

Reporting Guidelines

Informal Updates

During the funded period, we welcome occasional informal updates when there is something of note, especially with good news about your work or success stories that we may wish to share on our social media channels. Do also let us know should you encounter any challenges in delivering the work.

Formal Reports

We require an annual Grant Report one month after the end of the grant period. If a grant is for more than one year, please submit an Interim Report each year at the 10-month mark, allowing time to address any questions about continued funding. Future payments in multi-year grants are conditional on receipt of a suitable report. The reporting deadlines will be confirmed in the payment email (along with an email link to the report form) once we have confirmation of the grant start date.

You will receive report reminders one month before the deadline with the relevant weblink. Alternatively, if you wish to provide additional detail or have the requested information ready in one document, we can accept an emailed report, but this should answer all the questions in the monitoring form and provide the necessary information requested. Please send this to your Grant Officer.

Report Questions

Below is the typical information requested in grant reports:

- Brief summary of the funded work, including details about the location/s and type/groups of beneficiaries that benefited.
- Details of activity and outputs delivered, including numbers of things. Please also make reference to how this compares with your anticipated numbers at the start of the project/reporting period.
- Details about the impact, including number of beneficiaries, that your work has had and how you measured this impact. Please also make reference to how this compares with your anticipated impact at the start of the project/reporting period.
- Details about anything that worked very well or difficulties that needed to be overcome along with any changes made to the project as a result
- What difference did the grant from JRT make? (e.g. did it leverage any additional funding?)
- Case study: please write an anonymised case study of the impact the project has had on a beneficiary.
- Grant Financial Report: please upload a financial report showing expenditure against budget. Please give explanation for any underspend or any significant change to the budget.
- Images: please provide image files (jpegs) that illustrate how the funds were used, which we can use for our website/social media channels/publications.

For multi-year grants, Interim Reports should also include the following additional information:

- Organisational projected Income/Expenditure for current financial year.
- Whether, over the past 12 months, your organisation:
 - has reported any serious incidents to the Charity Commission.
 - has suffered any significant financial issues/loss of income.
 - is currently considering any merger, take-over or liquidation.
 - has had any change in leadership (Chair or CEO) or multiple trustee changes or any plans for such changes (outside of expiry of fixed term appointments).
 - has been the subject of any negative publicity.

Should you have any queries or issues, please contact your Grant Officer as noted in your Grant Agreement.

Note that the Julia Rausing Trust has shared administration with the Julia and Hans Rausing Trust.