**PERFORMANCE UPDATE**

**Part one: Summary information**

Partner name:

Project name:

Project ID:

Reporting period – Indicate which quarter and month below:

2020 – Q1 January/February/March

2020 – Q2 April/May/June

2020 – Q3 July/August/September

2020 – Q4 October/November/December

2021 – Q1 January/February/March

2021 – Q2 April/May/June

2021 – Q3 July/August/September

2021 – Q4 October/November/December

2022 – Q1 January/February/March

2022 – Q2 April/May/June

2022– Q3 July/August/September

2022 – Q4 October/November/December

**Attachments**

Tick **each** box to confirm that you have attached your:

Annex A – Payment Schedule

Annex B – Performance Update

Annex D - Changes

Annex E - Targets and Outcomes Schedule

Annex L - Participant Monitoring Spreadsheet

Annex O - Financial Monitoring Spreadsheet

Participant Zip Files (linked to Annex L)

Financial Zip Files (linked to Annex O)

Contract Variation Request Form

Copies of all Marketing Materials (fliers, social media, websites etc)

Part two: About your project

**What progress have you made?**

Describe the main activities you’ve started, continued or finished during this reporting period.Write up to 300 words including spaces.

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**What have you learned?**

Tell us about any achievements or unexpected outcomes you’d like to share with us along with any problems you’ve faced and how you’ve tackled them. Write up to 300 words including spaces.

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| **Please include details of:**   * **What has worked well this quarter** * **Why it has worked well/ what hasn’t worked well** * **What did you do to address things that were not working?** |

**Performance and project management**

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| **Please include details of:**   * **What your delivery priorities were this quarter** * **Any challenges faced** * **How did you overcome challenges?** * **What are your priorities for the next quarter?** |

**Part three: Your costs for this quarter**

Using the information you provided in Annex A, explain any major differences between your forecast and what you actually spent.

|  |  |
| --- | --- |
| Forecast Amount | £ |
| Actual Spend | £ |
| Difference | £ |
| **Please include details of:**   * **Any under/overspend this quarter and the reasons for this** * **What actions you are taking to resolve this for next quarter** | |

Part four: Your targets for this quarter

On your **target schedule** you told us the targets you actually met this quarter against the targets you forecasted. You must only report the outputs and results you have actually achieved, for which you have retained evidence in the participant file for each individual you have engaged on the project. This must be consistent with the information you have provided on the **participant monitoring spreadsheet.**

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| **Please include details of:**   * **Over performance in any outputs (male, female, unemployed etc.)** * **Under performance in any outputs (male, female, unemployed etc.)** * **Over performance in any results (into education or training, into employment etc.)** * **Under performance in any results (into education or training, into employment etc.)** |

Part five: Your project outcomes

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| **Participant figures**   * XX participants have formally withdrawn from the project * XX participants that have disengaged from the project but have not yet been formally withdrawn * XX participants are deemed to be at significant risk of withdrawing from the project * XX participants have Positively Progressed * XX participants have reached the point where a positive progression to jobsearch could be evidenced and claimed but have not been exited as you are continuing to support them to secure a higher-priority progression to education and training, or to employment * XX participants have reached the point where a positive progression to education and training could be evidenced and claimed but have not been exited as the partner continues to support them to secure a higher-priority progression to employment |
| **Please include details of:**   * **Why there is underperformance in outcomes** * **Why this has occurred** * **What actions you are taking to improve it** * **If you are over achieving in any outcomes how you have achieved this** * **Any unexpected outcomes that have been achieved** |

Part six: Cross-cutting themes

Provide a summary of actions taken this quarter, highlight any innovative activities.

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| Equal opportunities and gender equality |
| * **What you achieved against your plans** * **What has worked well** * **What still needs to be addressed and SMART targets for achieving them** |
| Sustainable development |
| * **What you achieved against your plans** * **What has worked well** * **What still needs to be addressed and SMART targets for achieving them** |

Part seven: Publicity

It is a condition of the grant that you acknowledge both the National Lottery Community Fund and the European Social Fund on any correspondence or materials used for the delivery of the project. This includes: job descriptions, promotional materials, event materials, paperwork and websites.

Provide a list or description of the publicity you have carried out.

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| **Please include details of:**   * **What publicity you have carried out** * **What has worked well** * **What you are looking at changing** * **What has the outcome been of the publicity you have carried** * **Number of participants engaged as a result** * **Increased awareness of the project** * **Value money** * **List any planned publicity for the next quarter** |

Part eight: Looking ahead

Summarise your plans and actions for the next quarter

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Part nine: Declaration

You confirm that:

* the information in this report is complete, accurate and true
* the money from The National Lottery Community Fund and the European Social Fund has been used exclusively for the project described in the original application, together with any changes you’ve agreed with us since then
* there haven’t been any significant changes to your project or the governance of your organisation or your partnership apart from any you’ve told us about and we’ve agreed in writing
* you haven’t received any duplicate funding for the activities, services or facilities that the Big Lottery Fund and the European Social Fund are paying for
* you have sought to achieve value for money by securing goods and services for your project at reasonable prices
* your organisation keeps full and proper accounts and records, including invoices and receipts, which show how the money from the Big Lottery Fund and the European Social Fund has been used
* your organisation has implemented its equalities policy and, if working with children, young people or vulnerable adults, a safeguarding policy. These policies are carried out and regularly reviewed to ensure they adhere to current legislation and regulations
* your organisation hasn’t disposed of any funded assets without getting permission from us in writing
* your organisation is following all current statutory requirements and other laws and regulations relating to the project and its working including: adherence to employers’ liability insurance; procurement regulations; the National Living Wage; the Working Time Directive; health and safety; safeguarding of children, young people and vulnerable adults; data protection, Freedom of Information and intellectual property rights legislation.

Please tick this box to agree the statements above are correct

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| --- | --- |
| **Name:** |  |
| **Job title:** |  |
| **Date:** |  |