



Arts Grants for Organisations

## Completion Report Help Notes

Training and Professional Development



The Arts Council of Wales is committed to making information available in large print, Braille, British Sign Language, Easy Read and on audio. We'll endeavour to provide information in languages other than Welsh or English on request.

We implement an [Equal Opportunities Policy](#).

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# Completion Report Help Notes

## Training and Professional Development

### Introduction

Welcome to the Completion Report Help Notes for organisations. You should use these Help Notes if you received funding through the Training and Professional Development strand of Arts Grants for Organisations.

Filling in a completion report for your project is the final stage in the application process and it's important that you submit a report that is as detailed and accurate as possible and supported by appropriate evidence.

The aim of these notes is to help you fill in your completion report using our online system. We'll explain how to do this as well as provide you with a guide to the information you must tell us about your finished project.

We'll also tell you why we're asking for this information and how we use the information you give us.

**Please submit your Completion Report within 1 month of the end of your project.**

### What's this Report for?

As a distributor of National Lottery Funding we're required to evaluate whether the grants we award are spent appropriately. The completion report helps us meet this monitoring requirement. It also provides us with valuable information that helps us understand the difference our grant made and what effect your project had. This is really important as it helps us assess the impact of our funding.

We're often asked to provide reports which show what we've funded, what activity has taken place and the difference our funding has made, so the completion report you return plays a crucial part on this too.

The information we collect from the completion reports also helps us to plan for the future. It ensures that our policy and strategy development is informed by accurate data and information which reflects the position of the arts in Wales. It can help us target where our

funding is needed the most. The completion reports also provide us with vital evidence so that we can advocate the value and importance of the arts.

### **What happens to the report?**

Your completion report and financial statement will be reviewed by officers. We'll contact you if we need more detailed information.

We know that projects don't always go to plan and we consider all completion reports on a case by case basis. When we've completed our reviews, we will, in most cases, be able to tell you the value of any final payment that is owing to you. We'll also tell you when you should receive it. We'll then be able to close the grant.

In some cases we may not be able to release, in full or in part, the final payment that you're expecting. Or we may request that you pay back some of the grant funding you have already received.

This may happen because you've not delivered your project as set out in your application, or because the amount you spent on your project or the amount of income you raised was significantly different from your project budget. Or there may be other reasons that have come to light in your completion report which mean we have to review the final amount of grant funding you're entitled to.

If you do not submit a satisfactory completion report, or do not comply with a request to pay back an amount of grant funding, you will be considered in default of your financial agreement with the Arts Council of Wales and will not be able to apply for funding from us in the future.

If you do apply to us again, we may use the information contained in your completion report as part of the assessment of your new application, as it contributes to our knowledge about your organisation, your previous activities and your track record.

Finally, we may use the information provided in your completion report for advocacy purposes. If necessary, we may get in touch with you to take this further.

### **How to fill in your Completion Report**

You can access our [online system here](#). You'll need your login details (your email address and password) to sign in.

Submitting a completion report is a requirement of your grant, so you will find it in the Requirements section. You'll find this tab in the top left-hand corner of your account page.

When you're working on your completion report online it's useful to remember:

- You can fill in your completion report in one go, or work on it at different times
- You can fill in the sections of the completion report in whichever order you prefer, but you'll only be able to submit your completion report when all of the sections are complete
- If you have your completion report open on your computer, but do not work on it for two hours, you'll automatically be logged out of our online system. Any work that you haven't saved by then will be lost

You'll need to refer to your original application and any changes you agreed with us as you fill in your completion report.

A copy of your application will always be available on our online system for you to see. You'll find it in the "submitted applications" section.

### **Alternative and Accessible Formats**

Sometimes there are particular reasons why people find it difficult to use our online system or to access our services. If you experience or anticipate any barriers with our completion report process, or require help accessing our services or information, please contact the Information Team to discuss the type of support we can provide. You can find our contact details [here](#).

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## Section 1: Your Project

In this section we're asking you to evaluate your project. It will help us understand what activity you delivered, what effect it had and what you've achieved. It's your opportunity to tell us about your project and to demonstrate how you used our funding.

You may find it useful to refer back to your original application and think about how your project compared with your expectations.

If you've completed your own evaluation of your project, you can use the findings to fill in this section. You should also submit your evaluation report as an attachment. You can do this in [section 6](#).

### Reviewing your project

**How well do you think your project developed the skills, competence and capability of those working in the arts in Wales?**

**Please explain your answer by telling us more about the key outcomes of your project**

We use the term "outcomes" to mean what happened as a result of your project, so

- Tell us briefly about the project you delivered
- Tell us if there were any changes from the project you proposed in your application form. Why did these changes come about?
- Tell us what went well and what went less well
- Tell us if you were satisfied with the quality of the project you delivered and with the quality of the experience enjoyed by audience members and participants
  - Tell us about any feedback you've received about the quality of your project

**Please tell us about the impact of your project**

We use the word "impact" to mean the effect of your project, so

- Tell us if you achieved what you set out to do:
  - Did your project meet the need / address the demand you had identified?
  - Did your project meet the aims and objectives you set out in your application?
- Tell us how you think the project went, both positive and negative, and what were your project's key achievements
- Tell us about the long term impact of your project.
  - What's your project's legacy?
  - Will you be able to sustain this in any way?
- Tell us about the environmental impact of your project:
  - What's your project's short term impact?
  - What's your project's long term impact?

## **Please tell us about the benefits of your project**

We use the word “benefits” to mean the positive changes and improvements that have happened as a result of your project.

We know that the projects we fund through the Training and Professional Development strand are about laying firm foundations for future development which will, in the longer term, impact on the quality of the work you, or other creative professionals deliver. So here we’re interested in how the project has benefited your organisation and others and how, as a result, it will benefit the public in the future.

- Tell us how your project has benefited:
  - Your organisation (if your project was about accessing training)
  - The intended beneficiaries (if your project was about providing training)
  - The arts in Wales as a whole / the arts sector in which your organisation works
- Tell us about the potential of your project to benefit the public in the future
- Are these benefits as you predicted?
- Have there been any unexpected benefits?

## **Please tell us how your project tackled barriers to engagement and reached out to the widest possible range of people**

We want the arts to be more inclusive and engaging, so we want the organisations that we fund to embed the principles of equality and diversity in all that they do. So,

- Tell us how well you reached everyone who could have benefited from your project. If it wasn’t as effective as you’d have liked, what would you do differently next time?

If your project provided training:

- Tell us how your project tackled barriers to engagement and reached out the widest possible range of people
- Tell us how you targeted certain groups, particularly those with “protected characteristics”. (You can read more about “protected characteristics in [section 2](#))

## **Please tell us what you’ve learned as a result of delivering this project**

- Tell us what you learned as a result of delivering your project
- Tell us if you encountered any difficulties and how you overcame them. These could be, for example, financial, creative or administrative difficulties, or problems related to marketing, personnel or programming issues
- What will you do differently in the future as a consequence of delivering this project?



Please tell us about any aspect of your project that you consider to be best practice -or ground-breaking (and that you would be happy to share more widely with the sector).

- Tell us why you consider your project to be an example of best practice or to be ground-breaking

## Reviewing your project's finances

Please explain any significant differences between the budget for your project and the actual income and expenditure figures.

How did you manage these changes? For example how did you cover the shortfall if the cost of your project increased or you didn't secure all of the partnership funding anticipated?

The more you can tell us when you send your form in, the quicker and easier it will be to calculate your final payment, or to close your grant.

### **Attachment: Financial Statement**

You must submit a financial statement with your completion report. This must be on our financial statement template, which you can download from the completion report.

Submitting a financial statement is mandatory as it forms an essential part of our review of your completed project.

Your financial statement must include the total cost of the project activity that we agreed to support and the income you raised in order to meet the cost of your project.

You'll be able to upload your financial statement in section 6 of the completion report.

## Using the Financial Statement Template

We use a financial statement template to help you present your financial information in a clear and structured way. It has the same structure and the same headings as the project budget you submitted with your application. Please make sure that you use the same headings for each figure that you used in your original project budget. This helps us compare your budgeted income and expenditure figures with your actual income and expenditure figures.

The template will guide you through filling in your financial statement. It has four pages (or tabs):

- A summary page
- An actual income page
- An actual expenditure page
- A checklist

The template will automatically calculate subtotals and will also display messages to offer advice, ask questions or to give reminders. If you see a red message you'll need to review your figures before you can upload your financial statement.

You can fill in the grey boxes in the spreadsheet with text and figures, but the white boxes can't be changed. Your figure should be rounded to full pounds (£). Some of the boxes will ask you to select from a dropdown menu.

If the template doesn't give you enough room or you'd like to provide further information about your financial statement you can upload this as **Other** information in section 6.

### **Acknowledging Arts Council of Wales funding**

In accepting our offer of a grant, you agreed to acknowledge our funding as widely as possible by meeting our requirements on accreditation. So please tell us here the ways in which you have acknowledged that your project was funded by the Arts Council of Wales.

#### **Attachment: Examples of how you acknowledged our funding**

You must submit examples of how you acknowledged our funding throughout the duration of your project. This could include either printed or online materials, such as a press release, but it must show that you acknowledged our funding and that you used the correct logos in the appropriate way.

Submitting these examples is mandatory as they form an essential part of our review of your completed project. You'll be able to upload your examples in section 6 of the completion report.

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## Section 2: Project Details

In this section we're asking you to tell us some facts and figures about your completed project. It's an important part of your completion report as it tells us some of the outcomes of your project, such as how many people benefited and how much activity you delivered.

We use this information to monitor what's happening across Wales and to report on the impact of our funding. Being able to demonstrate the impact of our funding helps us to advocate for the value and importance of the arts in Wales.

### Project Dates

This section is already filled in with the dates you've given us. If your project's actual start and / or end dates were different, please update the information here.

### Language

In your application you told us the language(s) you'd use to deliver your project. Please tell us here if there were any changes to the languages you used.

It's important you tell us as we often get asked to report on it.

### Artform

We collect and monitor information about how much funding has been awarded to each artform. This helps us report on how our funding is spent and helps us develop strategies and policies relating to different artforms.

In your application you told us the main artforms you thought your project would involve. Here we want to know what actually happened. Now that your project has finished, we'd like you to tell us about the artforms in more detail, by selecting the different disciplines, practices and activities that made up your project.

#### Artform: Examples

A small gallery received funding to stage a photography exhibition and an exhibition of paintings. In their application they selected Visual Arts as the main artform for their project. In their completion report they're selecting painting and photography from the list to show the artforms in more detail.

The table below will help you fill in this section.

Artform heading:	This includes the following sub-categories:
Cinema and video screenings	All screenings open to the public: Mainstream cinema, Art-house cinema, Specialist cinema, Live streaming of opera/ballet/theatre (such as The Met in New York) or other alternative content
Combined arts and multi-disciplinary arts	Carnivals, truly Multi-disciplinary festivals or events (single focus festivals should be coded to their particular artform)
Craft and applied art	Design, Applied Art, Ceramics, Textiles (including knitting or embroidery), Jewellery, Glass, Metal, Wood (including furniture), Multi or mixed media
Dance	Ballet, Community dance, Contemporary dance, Traditional dance, Youth dance, Culturally-specific (including traditional) dance – Welsh, Culturally-specific (including traditional) dance – other (for example Irish, Scottish, South Asian, African)
Drama and theatre	New writing, Contemporary play, Classical play, Welsh language theatre, Youth theatre and drama, Children’s and young people’s theatre, Theatre in education, Mime, Circus, Street theatre, Community theatre, Physical theatre, Experimental (including visual and digital theatre)
Film production	We don’t use any sub-categories for this artform
Literature	Youth literature, Poetry, Storytelling, Reminiscence, Library events, Publishing (print and web-based work), Literary talks
Music	Culturally specific (including traditional) music – Welsh, Culturally specific (including traditional) music – other, Jazz and improvised music, Classical music, Popular music, Youth music, Participatory community music, Experimental music
Opera	Opera, Music theatre
Public art (art in the public realm)	Visual art and craft (located in a public space), Landscape or environmental art (Public Art can be artworks on public or private property that have been supported by public or private funding.)
Theatre entertainment	Cabaret, Comedy, Musicals, Pantomime, Puppetry, Variety, Family entertainment
Visual arts	Fine art, Painting, Drawing, Print-making, Animation, Graphic art (including illustration), Live art, Moving image, New (i.e. digital) media, Computer-generated art, Multi-media, Sonic art, Performance art, Photography, Sculpture, Installation or site specific art

## Activity

In your application you estimated how much activity you would deliver and how many people would benefit from your project. Now that your project is complete, please tell us the actual number of events or activities delivered and the number of people who benefited from your project. Please be as accurate as possible and make sure that you include all of the activity you carried out as part of your project.

This information is really important as we use it to show the impact of our funding. It also helps us target our funding where it's needed most.

The table below explains the headings used on the completion report.

Heading	Definition (this is what we're asking you to tell us)
Number of training sessions delivered (1 session equals ½ day or less)	Tell us the number of sessions (a session is a half day or less) you delivered to trainees.
Number of training sessions attended (1 session equals ½ day or less)	Tell us the number of sessions (a session is a half day or less) that you or your staff accessed.
Total number of attendances at training sessions you delivered	Tell us the total number of attendances made to all the training sessions you delivered, or that you or your staff accessed.
Number of 'other' activities	Tell us the number and type of any other activities or events which don't fit into any of the categories above (you can put text and numbers in this box).
Other beneficiaries	Tell us the number and type of people who benefited from your 'other' activities who don't fit into any of the categories above (you can put text and numbers in this box).

## Employment

Please tell us how many weeks paid employment your project created. This is important as it helps us understand the economic impact of our funding.

## Equalities

We want the arts in Wales to be more inclusive and engaging, so we expect the organisations that we fund to embed the principles of equality and diversity in all that they do. We want to know how our funding is being used to target and reach people who are affected by inequality.

The Equality Act 2010 talks about people with "protected characteristics" and we are collecting information about projects that we're funding that deliver activities specifically for

these groups of people. The protected characteristics are age, disability, gender reassignment, marriage and civil partnership, pregnancy and maternity, race, sex, sexual orientation, religion or belief. The Act made it unlawful to discriminate against people on these ground.

In your application you told us if your project was specifically targeted at people with “protected characteristics”. If there were any changes to the way you targeted your activity, please tell us here.

You should also tell us in section 1 of your completion report how effective you were at reaching these specific groups.

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## Section 3: Project Location

We're frequently asked to report on where our funding goes. We use postcodes to monitor which parts of Wales are benefiting from our grants. We can use them to demonstrate the extent to which our funding is reaching out to priority areas for investment, such as Communities First areas.

In your application you told us where your project would take place. If there were any changes to the location of your project's activity, please tell us here.

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## Section 4: How did we do?

We want applying to *Arts Grants for Organisations* to be as straightforward as possible, and we welcome your feedback on how well we've managed your application.

Your comments will be reviewed and used to help us improve the ways we work in the future.

Please do not include specific comments relating to your grant, as we are unable to respond to them. In these cases please contact our Information Team by emailing [information@artscouncilofwales.org.uk](mailto:information@artscouncilofwales.org.uk) in the first instance who will direct your enquiry to the most appropriate person.

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## Section 5: Declaration

In this section we're asking you to read some important information about our responsibilities around Data Protection and Freedom of Information.

It's important that you understand how the information you submit will be used and stored by us. And you need to know what to do if you believe that any of your information is commercially sensitive or confidential.

We're then asking you to confirm a number of statements. This includes two important points about copyrighted material:

- by uploading your own copyrighted material you'll be giving us permission to publish any of it in order to help us celebrate the value and impact of the arts
- by uploading other people's copyrighted material (for example from a photographer or filmmaker), you'll be confirming that you've secured their permission for us to publish their work for the same reasons. You'll also have ensured that all such items are suitably credited.

By ticking the box you're signing the Completion Report electronically on behalf of your organisation.

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## Section 6: Attachments

It's in this section that you can upload your supporting documents. Our online system calls these attachments.

There are certain attachments that you must submit with your completion report. These are:

- Your financial statement
- Examples of how you acknowledged Arts Council of Wales funding

Remember that these are mandatory. They form as essential part of our review of your project and we won't be able to accept your completion report without them.

### How to upload your documents

Use the dropdown menu at the bottom of the screen to upload your documents. Each of the mandatory documents is included on the menu. There is also an "other" category.

Please note that there is a maximum total file size of 25MB for attachments.

If you need help with document formats or want further information on other technical uses please read our Applying Online [Information Sheet](#), or have a look at our attachments [trouble shooting guide](#).

### Other supporting information

It's important to support the information you've provided us in the completion report with appropriate evidence. This could be images, audio or video files, audience, participant or trainee feedback, reviews and press cuttings and evaluation reports. You should upload this evidence here, using the "other" category on the dropdown menu.

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## Section 7: Review my Completion Report

This section allows you to review the information you've filled in so far, and to make any changes. Our online system will also tell you if you've missed any questions.

If you're happy with your completion report you can click **Submit**. This forwards your completion report to us for review.

A copy of your submitted completion report will always be available on our online system for you to see, once you've clicked the button to submit it. You'll find it saved under the "submitted requirements" section on our online system, after you've logged in. You can also print a copy for your own files.

Once you've clicked **Submit** you'll receive an automatic acknowledgement by email. If you don't receive this please check it's not in your junk mail folder. If you still haven't received your acknowledgement email, please check your completion report and try clicking **Submit** again.

If your completion report isn't finished, click **Save and Finish Later**. You'll then receive an email containing a copy of your draft completion report. Please keep this email for reference.

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