



What is expected from grant recipients?

The expectations of grant recipients are different depending on the nature of the organisation, the project, and the grant funding. Exact details of what our expectations are will be outlined in the grant offer letter.

However, broadly our expectations for all recipients are:

- **engagement:** you will appropriately engage with the Pets Foundation ('The Foundation') to celebrate the donation with your followers and our own
- **evidence:** you will return evidence demonstrating that the funds have been spent as per the grant terms and conditions
- **self-evaluation:** you will complete and return a form evaluating the grant and its outcomes

All grants are provided on a restricted basis and must only be used for the purpose specified in the grant offer letter. Grant recipients must provide regular updates to The Foundation on the progress of the project and inform us promptly of any changes which may impact how or when the grant is used.

Engagement

The Pets Foundation relies on engagement from its beneficiaries so we can thank our donors and encourage future donations. The level of engagement depends on the nature and value of the grant and will be detailed in the grant offer letter; however for all recipients we ask for:

- a social media post, tagging The Foundation
- the sharing of any posts published by The Foundation, into which your charity is tagged
- photos and case studies of pets or clients helped
- an article in your newsletter (if you produce one)

In addition:

- *if receiving funds towards a large capital building project*
 - an invitation to the opening of the new/refurbished building for The Foundation and local Pets at Home colleagues
 - the display of at least one Foundation plaque (provided by The Foundation)
- *if receiving funds towards a vehicle*
 - two Foundation logos to be displayed on the vehicle as per the Foundation's design (to be provided); an additional donation of £350 will be made to cover the costs of sign-writing

For large value or multi-year grants we may also ask for:

- additional social media posts

- updates throughout the year on the progress of the application, including photos and videos
- contribution towards a press release
- acknowledgement of our support on your website and in your annual impact report

Evidence

See Annex 1.

Self-evaluation

Small, one-off grants

At a point when it can be reasonably expected the grant has been spent in full (minimum six months after the donation) The Foundation will provide you with a self-evaluation form to complete and return. This form will ask for information on:

- **outputs:** what has the funding actually been spent on
- **outcomes:** what difference has been made
- **blockers:** any internal or external challenges which have affected the outputs or outcomes

For example, if you have received a grant funding vet bills, you will be asked:

- to confirm that the grant has been spent on vet bills, and whether it has been spent on a particular element (e.g. neutering)
- how many animals have been helped by the grant
- to provide case studies of several animals helped
- to explain any problems which may have prevented you from using the grant in full (e.g. lack of volunteers impacting the volume of TNR work)

Large, one-off grants

Larger grant recipients will also be provided with a self-evaluation form to complete and return; however the recipients of larger grants are expected to keep in touch with The Foundation throughout the year, updating us on the progress of projects and alerting us to any delays or problems. This includes (if relevant) sending us photos or videos of work in progress.

Forms will be issued when it can be reasonably assumed that the funding has been spent and the project is complete (e.g. the kennel build is complete and dogs have moved in).

This evaluation will also cover:

- **outputs:** i.e. what the funding has actually been spent on
- **outcomes:** what difference has been seen
- **blockers:** any internal or external challenges which have affected the outputs or outcomes

We may also ask to visit your organisation to see completed building work or observe funded projects in action.

Multi-year funding: programme evaluation

The Pets Foundation invites applicants who meet our 'Helping People Through Pets' criteria to apply for funds for up to a three year period. Where multi-year funding is agreed, The Foundation will award funds for Year One, and will pledge funds for additional years, with funds to be released each year once the terms of the pledge have been met.

The exact terms of the pledge will be different depending on the nature of the organisation, the project, and the grant; however it will focus on two areas:

- the level of engagement with The Foundation assisting us to celebrate the grant (see above)
- an evaluation of the previous year, demonstrating that the project is on track to achieve its desired outcomes

These terms will be detailed in the grant offer letter and must be met by the end of a funding year in order for funds to be released for the following year.

Towards the end of the first year, grant recipients will be provided with a self-evaluation form to complete and return; however this is considered a prompt, and organisations are encouraged to do their own self-evaluation throughout the year to ensure they can assess the impact of the grant and demonstrate the difference it is making.

This evaluation will cover:

- **Outputs**

The grant recipient must outline what the funding has been actually spent on, including whether it has been spent in its entirety, and provide documentation evidencing the spend (as detailed in Annex 1).

- **Outcomes**

The grant recipient must describe the outcomes of the grant funding on its activities and its beneficiaries. An evaluation of outcomes should include:

- quantifiable figures on the numbers of pets or people helped
- quantifiable figures on any positive change in circumstances for people helped
- evidence from beneficiaries gathered through surveys, interviews or focus groups
- evidence from stakeholders, including volunteers
- case studies (anonymised where relevant)

- **Blockers**

If applicable, provide information on anything which has not worked as well as planned, and whether you intend to make any changes as a result.

For example, The Foundation provides a grant to a charity to fund an animal-assistance learning programme whose aim (outcome) is to help excluded young people return to

education. Funds are provided for Year One, with additional funds pledged for Years Two and Three. At the end of Year One The Foundation issues a self-evaluation form to the charity which asks:

- what has the money been spent on
- how many programmes were held, and how many young people attended
- how many young people returned to education following their attendance
- feedback from the young people on the programme
- feedback from any relevant stakeholders on the programme
- case studies
- has anything prevented outcomes from being achieved
- have you gained any learnings which will affect the way the programme is delivered going forward

The content of this self-evaluation form, together with updates you have provided to The Foundation throughout the year, will be used by our Trustees to review whether the terms of the pledge have been met and if funds for the following year should be released.

You will be asked to complete a similar assessment at the end of Year Two, before funds are released for Year Three.

We may also ask to visit your organisation within the first year, so we can talk about your work and the project, and see the impact first hand. This may, where appropriate, include observing funded projects in action.

Annex 1

We ask for evidence that the funds have been spent as per the terms and conditions of the grant. This evidence should be included with this form and returned to the Foundation.

All invoices or receipts must relate to payments made after the grant was awarded.

Direct activity costs / core costs

Where funds were used for direct activity costs or a contribution to core costs, please provide a financial breakdown of how the funds were used below (you may wish to use as reference the budget originally provided with the application).

Where related expenditure has been included and can be identified in your audited annual accounts, no invoices or receipts are required.

Vet bills

- A statement from your vet(s) showing the grant payment credit to your account, **or**
- Copies of any recent invoices or receipts relating to veterinary treatment

Boarding costs

- A statement from your boarders showing the grant payment credit to your account, **or**
- Copies of any recent invoices or receipts relating to boarding fees

Food/equipment

- Copies of invoices or receipts relating to purchases

Salaries (if PAYE)

- A payroll report for the period(s) since the grant was awarded, showing gross pay, deductions made and net pay, and
- A sample of payslips dated within the same period, with names and addresses redacted, and
- A P32 summary report for the 2020-21 YTD

Salaries (if sessional worker)

- Copies of invoices relating to payments

Vehicles

- Copies of invoices or receipts relating to purchases
- Photo evidence that the vehicle has been sign-written as per the Foundation's design
- Photos and/or video showing the vehicle in use

Learning and development opportunities for staff/volunteers

- Copies of invoices or receipts relating to the training course(s)

Building work

- Copies of invoices or receipts relating to the *majority* of the building work
- Photos of the completed building
- A video of the completed building (with pets in situ)