

PROGRESS REPORT

Congratulations on making it to this point in your grant! We are interested to learn how your grant is going--both the successes and the challenges. This progress report (and financial statement) is required as part of your grant conditions, but it is also an opportunity for us to communicate. Your honesty is very much appreciated.

Payment of each grant instalment is contingent upon receipt of this information.

Please refer to the [online grant reporting guidance](#) to help you to more easily complete your report.

As we encourage excellence but also seek to support innovation, we do not expect success in every aspect of every project, and appreciate your honesty and transparency in reporting.

Reference number

Progress report due date

Organisation

Please confirm whether or not the organisation address has changed since the grant was awarded.

Name of the person completing the progress report.

If the primary contact for the project has changed since the grant was awarded please include:

- the new contact's name
- position title
- telephone
- email

Grant amount

Project title

Project Description - as in your original application

PROJECT PROGRESS AND OUTCOMES

Project Goals

Here are the projects goals outlined in your application:

Goal 1

Grantee: KPI1

Goal 2

Grantee: KPI2

Goal 3

Grantee: KPI3

Goal 4

Grantee: KPI4

Goal 5

Grantee: KPI5

- 1. Please describe how the project is progressing against the above goals.**
Note: If you have revised your goals with your program manager, the new goals should be listed above. If not, please note this in your response.
- 2. If there have been any changes to the project (including the timeframe, budget, staffing) please describe these changes, and explain the reasons for them.**
- 3. What has been surprising?**
- 4. Please outline future plans/actions for your grant project. Please include any challenges (reduced funding, difficulty recruiting) that your project or organisation are currently facing.**

FINANCIAL STATEMENT

Please attach a statement of project income and expenditure to date, and include comment(s) on any significant changes in the budget items from the original budget proposed. It **must** be signed and dated by the relevant authorised person (e.g. CEO, CFO, Research/Grants Management Accountant) with itemisation of:

- the amount received from The Ian Potter Foundation
- the cash financial contribution received from your organisation
- other funding sources and amounts received from them
- amounts expended to date
- the balance (if any) remaining at date of the report
- and a forecast of upcoming costs.

In order for us to get a complete understanding of how your project is going, we need a financial report in the same format as the budget you submitted in your application. Please include in the income and expenditure sections columns titled "*estimated*" and "*actual*" (as in the report template).

If you used your own budget template when you applied, please use the same cost headings, adding additional headings and rows to account for unanticipated costs.

If you used the Foundation's budget template when you applied you may like to use the [IPF FINANCIAL REPORT TEMPLATE](#). You should add additional headings and rows where necessary in order to provide as complete an itemised financial report as possible.

Print a copy of the completed financial statement and arrange for it to be **signed and dated** by the relevant authorised person (see above). Then scan it and upload it as an attachment.

Upload Financial Report