

PROGRESS REPORT

GRANT DETAILS

This document is for reference only. Reports will only be accepted via our online system.

* Required before final submission.

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

Progress report due date

Organisation name

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

PROJECT PROGRESS AND OUTCOMES

Changes or Issues

*If there have been any changes (including any issues resulting from bushfires, COVID-19, the timeframe, budget, staffing), please describe them, and explain the reasons for them.

Word count 300

Project Goals

The goals outlined are from your application except if you have revised them with your program manager. If the goals were revised the new goals should be listed. If not, please do not begin, please email/ring the Foundation and we will update the form.

Goals 1-5 will be listed with your: Timeline of the actions/KPIs necessary to achieve the goal and; the Measurements to be put in place to determine if you have achieved your goal.

*Describe how you are progressing against each goal - Word count 300

*What has been surprising? Word count 300

*Please outline future plans/actions for your grant project.

Please include any challenges (reduced funding, difficulty recruiting) that your project or organisation is currently facing. Please also let us know how we can help you thrive.

Word count 300

If applicable, please upload any additional project information relevant to your progress.

FINANCIAL STATEMENT

In order for us to get a complete understanding of how your project is going, we need a financial report. 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 this report
- And a forecast of upcoming costs

Please use the Foundation's [FINANCIAL REPORT TEMPLATE](#). In each of the income and expenditure sections you should include both 'estimated' and 'actual' (as in the 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.