

## PROGRESS REPORT

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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.

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**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**

The project goals, timelines and measurements outlined in your application or those updated and agreed with the Foundation will be included here.

**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 do not begin, please email/ring the Foundation and we will update the form.

Word count 0 to 300

**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.**

Word count 0 to 300

### 3. What has been surprising?

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### 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. Please also let us know how we can help you thrive.

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## ATTACHMENT

If applicable, you may 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 the 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.