Progress Report

At HMSTrust we maintain a continued interest in the projects that we support and, in accordance with your Grant Agreement, we require you to submit a Progress Report. Your report helps us to find out how the grant is going and understand what difference it is making. It provides a useful prompt for you to get feedback on, and analyse and understand the impact of your work, and gives you an opportunity to reflect on progress and what you've learned.

We don't expect whole essays. Your report should be based on the past year's progress towards the key outcomes you aim to bring about, or make progress towards, over the term of the grant. We just need enough information to understand how work is going practically and financially; and to identify useful lessons that will inform your work, and that informs us as grant-makers in this sector.

We don't just want to hear about your successes. While many projects develop as anticipated, we also understand that some don't always proceed according to plan. We are particularly interested to learn why projects may not have proceeded as planned, what your organisation has learnt from any challenges you have met with, and how that knowledge will feed back into the development of this project and your broader organisational activities.

Through you, we learn how to better support organisations, their beneficiaries and the wider sector going forward and appreciate your honesty in reporting back to us.

The information included below is extracted from your original application to assist you with reporting back against the original project proposal as submitted.

Please refer to the *Guide to HMSTrust Online Grant Reporting* which is available on our website under the Grantees and Resources sections in Forms for technical and writing tips. A PDF sample of the Progress Report form is also available to help you prepare your answers, taking note of word limits.

Payment of your next grant instalment is contingent on receiving this report. You will be asked to upload your invoice.

Please contact HMSTrust on 03 9999 3000 or grants@hmstrust.org.au if you have any questions or require an extension.

Key Grant Details

Organisation Name: *This field will be pre-populated from your grant application*

Project Title: *This field will be pre-populated from your grant application*

Grant ID: *This field will be pre-populated*   **Report Due Date:** *This field will be pre-populated*

Project Contact: *This field will be pre-populated from your grant application*

If the primary contact for the project has changed since this grant was awarded please include:
 - The new contact's name
 - Position
 - Telephone
 - Email

Total Grant Approved $: *This field will be pre-populated*   **Date Approved:** *This field will be pre-populated*
Amount paid to date $: *This field will be pre-populated*

Project Description: *This field will be pre-populated from your grant application*

Progress and Outcomes

1. Annual Milestones

Have you achieved your annual milestones for the past year as submitted in your grant application? Only select the appropriate year you are reporting on. Please provide specific numbers and facts where possible. For example, if one of your annual milestones was "Interactive education with young people in sports clubs", the achievement against this milestone should be as specific as possible e.g. "15 education sessions provided to 489 participants aged 15-23yrs".

Annual Milestones Year 1:
This field will be pre-populated from your grant application

> *** Achievements against milestones Year 1:**
> Include the dates you are reporting on as Year 1.
> *If you submitted a Year 1 Progress Report already, this field will be pre-populated with your answer.*

Annual Milestones Year 2:
This field will be pre-populated from your grant application

> *** Achievements against milestones Year 2:**
> Include the dates you are reporting on as Year 2.

Outcomes

How is your project tracking to meet its intended outcomes? Please give us an overall description. We ask you to be as succinct as possible. Dot points are acceptable. Please provide as much data to support your answers as you can, rather than generalised statements. If you have documents you would like to share that illustrate your progress, you can attach these at the end of this report.

Key Expected Outcomes: *This field will be pre-populated from your grant application*

> *** 2. Progress so far:**

> **3. What has been surprising?**

> **4. Have you met any challenges which have affected the delivery of your project?** (Consider external or internal issues e.g. difficulty recruiting, partnership challenges, government funding changes, lower than expected participation) (max 100 words):

> **5. Have there have been any changes to the project from the original proposal that you have not advised HMSTrust about?** For example, changes to partnerships, key staff, and timeframes or budget allocations. Please describe the changes and explain the reasons for them. You may be required to submit a grant amendment. (max 100 words):

> **6. Have you been able to leverage HMSTrust funding to secure further support?**
> (e.g. such as grants from other sources, ongoing funding, other forms of support or benefits.) (max 100 words):

Financial Reporting:

In order for us to get a complete understanding of how your project is going, we require a financial report to be provided. Please download the *Financial Acquittal template-Multi-year Grant Report* (Excel) from the Forms section of our website and include the budget as stated in your original grant application and the actual annual income and expenditure as comparison.

The financial acquittal is to be signed and dated by your organisation's CEO or equivalent, scanned and uploaded as a PDF attachment to this Progress Report.

Paid Amount $: *This field will be pre-populated*

*Total Amount Expended $:

Unexpended Funds Amount $:

If you have unexpended funds exceeding more than 10% of the last grant payment, please call us to discuss before submitting your Progress Report.

* Attached Financial Acquittal:
To attach the PDF of your signed financial acquittal, click the browse button to locate the document on your hard drive, then click Upload. It may take a while to upload.

* Attached Invoice:
Please upload your invoice for the next instalment of your grant (exclusive of GST). If your bank account details have changed, please include the scanned header from a bank statement or deposit slip showing proof of bank account and include this with your invoice.

Support Materials

If you would like to share copies of documents, e.g. literature review, internal or external evaluation, reports, media articles or other material relating to your project from the past year with the Trust, please upload them here.

Photos attached   ☐

Documents attached   ☐

Attachments
To attach documents, click the browse button to locate each document on your hard drive, then click Upload.

Photographs

You must ensure that all rights, consents, licenses and permissions have been obtained prior to submitting images and quotes. For images provided, please include below any captions, names of any people pictured and acknowledgements if required. The provision of information and images will be taken as permission to reproduce and publish.

Photo 1 ☐

Photo 2 ☐

Photo 3 ☐

Other documents ☐

Acknowledgement ☐

Formal acknowledgement of HMSTrust support is not a general requirement. However, if HMSTrust has been acknowledged for its support of this project, please indicate the type of acknowledgement provided.

Annual Report ☐

Promotional material ☐

Website ☐

Signage ☐

Speeches ☐

If other, provide details

Do you have any suggestions of ways in which we could improve our processes? Please be honest, we won't take it personally or hold it against you. We are seeking to continuously improve our grant making processes and welcome your feedback. (max 100 words):