

Sample online Final Report form

This is a sample of the HMSTrust Final Report form which you will be asked to submit through our online gateway "My Account" which is accessed through our website. This sample form shows you the questions (in red in boxes) you will be asked to answer, and can be used to help you prepare your responses which can be copied and pasted into the online form. Some fields will be pre-populated with information that was contained in your original grant application. * = required before submission

Final 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 Final Report. The Final Report is due within two months of the scheduled project completion date which you provided to HMSTrust. Do not submit your Final Report until your project has been completed. If the date for completion has changed, please contact us immediately. Your report helps us to find out how the grant went and understand what difference it has made. 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 what you learned.

Please complete the following Final Report form to acquit your grant. Information included in the form below has been extracted from your original application to assist you with reporting back against the original project proposal you submitted.

Please refer to the Guide to HMSTrust Online Grant Reporting which is available on our website under Forms in the Resources section for technical and writing tips. This includes information on which browsers to use and how to save your work as you move through this form. A PDF sample of the Final Report form is also available to help you prepare your answers, taking note of word limits.

Your report should be based on your progress towards the key outcomes you aimed to bring about, or make progress towards, over the term of the grant. *We don't expect whole essays.* We just need sufficient information to understand how your work went practically and financially; and to identify useful lessons that will inform your ongoing 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 met with, and how that knowledge fed 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.

Financial Acquittal: 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 relevant Financial Acquittal template 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. Add additional headings to account for unanticipated costs or income if necessary.

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 Final Report.

If you have unexpended funds, please call us to discuss before submitting your Final Report

IMPORTANT: Your current grant record will remain open and you will not be eligible to submit further applications to HMSTrust until a satisfactory Final Report and financial acquittal is provided on completion of the project. Universities are the exception to the rule, with two active grants permitted.

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

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*

Total Grant Approved \$: *This field will be pre-populated* **Date Approved:** *This field will be pre-populated*
Report Due Date: *This field will be pre-populated*

Project Start Date: *This field will be pre-populated* **Actual Project Start Date**

Project End Date: *This field will be pre-populated* **Actual Project End Date**

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

- The new contact's name
- Position
- Telephone
- Email

Amount paid to date \$: *This field will be pre-populated*

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

Social need your project aimed to address: *This field will be pre-populated from your grant application*

Financial Reporting:

Using the relevant *Financial Acquittal template* which you can download from the Forms section of our website, please attach your Financial Acquittal showing total project income and expenditure. It should provide a comparison of the budget as stated in your original application and the actual income and final expenditure. Add additional headings to account for unanticipated costs or income if necessary.

This Acquittal is to be signed and dated by your organisation's CEO or equivalent, scanned and uploaded as a PDF to this final report.

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

*** Total Amount Expended \$:**

*** Unexpended Funds Amount \$:**

If you have unexpended funds, please call us to discuss before submitting your Final 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.

1. Key Objectives

In your original grant application, you matched your project to 3 or more of our Key Objectives. The original matching objectives as submitted with your application are pre-populated and included below. Please provide a brief one line sentence summarising how your project met our matched Key Objectives. **Only complete the sections against the relevant pre-populated project objectives.**

Please provide quantitative data where possible. You will have the opportunity to expand on this information under Q2 Key Outcomes.

■ **Rural and Regional Victoria:** Strengthening the capacity, resilience and potential of communities in rural and regional Victoria.

Your project objectives: *This field may be pre-populated from your grant application*

Your achievements against this objective:

Word count 0 of 30

■ **Indigenous Victoria:** Supporting initiatives that protect, restore, sustain and empower Indigenous communities, heritage and land.

Your project objectives: *This field may be pre-populated from your grant application*

Your achievements against this objective:

Word count 0 of 30

■ **Building Organisational Capacity:** Developing the skills and capacity of individuals, groups, communities and sectors that provide long-term benefits to Victorians.

Your project objectives: *This field may be pre-populated from your grant application*

Your achievements against this objective:

Word count 0 of 30

■ **Extending Opportunity:** Supporting projects that extend and protect basic rights and freedoms for all Victorians.

Your project objectives: *This field may be pre-populated from your grant application*

Your achievements against this objective:

Word count 0 of 30

■ **Collaboration and Partnership:** Maximising the impact of the Trust's social investments through collaboration and partnerships across community sectors. Partnerships include other service providers and/or other funders including government.

Your project objectives: *This field may be pre-populated from your grant application*

Your achievements against this objective: Please provide quantitative data where possible

Word count 0 of 100

2. Key Outcomes

* = required before submission

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

* 2.1 Provide a brief listing of up to 5 Key Project Achievements:

(Please include quantitative data, not generalised statements e.g. 14 employers engaged with resulting in increased understanding of the needs of culturally diverse workers and increased capacity to employ such workers)

Word count 0 of 100

* 2.2 What were the Actual Outcomes?

(What you achieved with the project, i.e. the effects on participants/beneficiaries from their involvement in the project and how you measured this)

Word count 0 of 500

2.3 What has been surprising?

*** 2.4 Did you meet 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. Dot points are acceptable):

Word count 0 of 100

*** 2.5 Have there have been any changes to the project from the original proposal that you did not advise 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):

*** 2.6 Provide brief details of Key Learnings:**

(e.g.: improvement areas, reasons for success or challenges and applying learnings to future projects. Dot points are acceptable)

Word count 0 of 150

*** 2.7 Were you 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.):

Word count 0 of 100

From Government sources \$:

From non-Government sources \$:

*** 2.8 What are the expected long-term social impacts of the project, and what plans do you have to measure these?**

*** 2.9 What is the future of the project?**

(If your project is ongoing, what are your plans and how will it be funded?)

Word count 0 of 100

2. Further Information

Please include other key project information you would like to share.

We encourage you to provide copies of project evaluation reports (if any), photographs and to share quotes and stories from project beneficiaries.

Project Evaluation Report attached

Photos attached

Documents attached

Attachments

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

Project Evaluation Report:

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:

Feedback

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.

Word count 0 of 100