

**Intake Form Title:** IPF Progress Report  
**Request:** Koala conservation South West Victoria  
**Organization:** Test Organisation - Pro Koala World

# Project overview

Please provide an overview of the project’s progress over the past year. Consider its successes, challenges, changes and surprises.

**Word limits** are indicated for each section of the report. Please aim to stay within the limit.

**\* Project Overview**

Provide an update, including any highlights to date.

Word limit 300

**\* Have there been any challenges delivering the project?**

Word limit 300

**\* Future plans / actions for your project**

Please outline any future plans/actions for your project, including any challenges (e.g. reduced funding, difficulty recruiting) that your project or organisation currently faces. Please also let us know how we can help you thrive.

Word limit 300

**\* What has been surprising? Please comment.**

Word limit 300

**Attachments**

Please upload any relevant attachments that you would like to share with us.

# Goals update

**For each goal** select the rating most appropriate to its **current** progress.

In the text field provide a high-level overview of progress towards the goal identifying any highlights to share with the Foundation, including:

- any challenges or revisions that you would like to discuss with your Program Manager
- any key upcoming next steps

**\* Project Goal assessment**

- GOAL 1.**
- GOAL 2.**
- GOAL 3.**
- GOAL 4.**
- GOAL 5.**

# Activity and Measures tracking

In this section, you need to provide an update on the Activities and Measures for each goal. If you would like to revise any of these, please advise your Program Manager.

## Note:

- **Download the attached Excel file**, which contains your identified Activities and Measures. If the file doesn't open directly, open it from your Download folder.
- **Save a copy of the file, update and upload** it to the system. The system **will not automatically save changes to these documents within this portal**.
- The first tab of the spreadsheet contains detailed instructions
- Provide a concise snapshot of progress against the Activities and Measures
- Include any explanatory text in the Goals update section.

**Each successive progress report will use this template for Activities and Measures updates.**

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## \* Activities and Measures update

Please upload the updated activities and measures file.

*File not uploaded*

## Evaluation assistance request

If you would like to discuss evaluation, please select this option. Once your report is submitted the Research & Evaluation team will contact you.

You can also refer to these resources available on our website:

- TIPFEP – The Ian Potter Foundation Evaluators Panel
- Learnings – Learnings from other IPF grantees

No

# Budget Update

To understand how your project is going, we need a financial report outlining income and expenditure to date, including comment(s) on any significant changes in the budget items from the original budget proposed.

**If you have not spent the forecast amount, please contact your Program Manager before completing this report.**

- **Download** the attached Excel file. If the file doesn't open directly, open it from your Download folder. Refer to the Instructions tab for further information.
- **Save a copy of the file**, as the system **will not automatically save changes to these documents within this portal**. Add additional headings and rows where necessary.
- Provide a complete and itemised financial report and update the following as required:
  - Amount received from The Ian Potter Foundation
  - Financial (cash) contribution received from your organisation
  - Other funding sources and amounts received
  - Amounts expended to date
  - Balance (if any) remaining at the date of this report

- A forecast of upcoming costs.

- **Upload an unsigned copy** of the updated financial report in the Financial Acquittal section.
  - **Print** a copy of the completed (unsigned) financial report and arrange for it to be signed and dated by the relevant authorised person e.g. CEO, CFO, Director of Research.
  - **Scan** it and upload it in the Signed Financial Acquittal section.
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### Budget update

Please include a brief overview if you have any significant delays in expenditure or changes to the budget allocation.

### \* Financial report - unsigned

Please ensure you save the file once downloaded. This document will remain on your grant record and be used for your next progress report.

*File not uploaded*

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### \* Financial report - signed

This file is attached to your grant record and is required for audit purposes.

*File not uploaded*

## Authorised Signatory

Once your progress report has been reviewed and the Foundation has approved the release of a grant payment to your organisation, the Authorised Signatory will be requested to complete and confirm your organisation's bank account details in order for the payment to proceed.

Please confirm or add the contact details of your organisation's Authorised Signatory e.g. CFO, Finance Manager. The authorised person cannot also be the Request Primary Contact. The Director of Research may complete the details for Universities.

If the Authorised Signatory person is not listed below, please click *Select Contact* and *Add New Contact* to add their details.

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### \* Authorised Signatory Person

## Contacts Submitted in Grantee Portal