

Now that your project has been approved, you will be expected to provide periodic Progress Claims (a.k.a. Project Reports) to the Investment Agriculture Foundation of BC (IAF). These reports provide us with information about the progress of your project against the approved project plan as outlined in your application. The reporting requirements for your project are tied to your payment schedule and are outlined in Schedule A of your legal agreement with IAF.

We have provided you with a pre-filled Project Report template to make reporting easier. The Project Report consists of four sections: (1) Cover Page; (2) Report on Progress; (3) Project and Expenditures Report; and (4) Report on Project Funding. These guidelines are provided to assist you in completing all four sections for Progress Reports and Final Reports. If you have any questions, please contact your Program Manager at IAF.

Please ensure that the individual responsible for completing Project Reports receives a copy of the Project Report template and these Guidelines.

The Review Process

Every Project Report submitted goes through a thorough review process to check for compliance and performance at key stages as originally proposed in the project application. Any errors or omissions in your report will delay the review process and the release of further payments.

Interim and final payments will only be released once reporting requirements are met to our satisfaction. Please be advised that should a substantial surplus in funding be reported at any phase, we may elect to release further payment only at such time as demonstrated that additional funds are required.

TIP: If you plan to make any changes to your project's activities, timelines or budget, you must seek prior approval from IAF. Unauthorized changes to your project may be outside your legal agreement with IAF and may not be eligible or approved. Do not wait until you submit a progress report or final report to bring changes to our attention. Contact your Program Manager at IAF to discuss project changes as they develop. Once these changes are approved, your Program Manager will send you a revised Project Report template.

Section 1: Cover Page

Project # / Project Title / Recipient: These will be pre-filled in the template that is sent to you.

Report Type: This will be pre-filled for the first report that is required. For subsequent reports (for projects that require more than one), refer to the Payment Schedule (see Schedule A of your legal agreement) and select the appropriate report type.

Reporting Period: This will be pre-filled for the first report that is required. For subsequent reports (for projects that require more than one), refer to the Payment Schedule (see Schedule A of your legal agreement) and enter the corresponding dates.

TRANSMITTAL NOTICE:

- Before signing, please ensure the information provided in your report is complete and accurate.
- **Recipient's Designated Officer:** The report should be signed by a representative of your organization who is authorized to submit the Report on Progress and financial information on behalf of the recipient.
- For Progress Reports or Annual Reports: only the designated officer needs to sign.
- For the Final Report: additional signature(s) are required. See next section.

Program funding provided by:

For the Final Report Only:

- A Final Report must be submitted upon completion of the project together with a Verification of Project Completion.
- For a Small Project, the Verification of Project Completion must be signed by one duly authorized representative of the funding recipient.
- For all other projects, the Verification of Project Completion must be signed by two duly authorized representatives of the funding recipient.
- The person(s) who sign the Verification of Project Completion should match those who signed the legal agreement. If this is not possible, please provide an explanation and confirmation of the signing authority for the new representatives.

Section 2: Report on Progress

PROJECT SUMMARY:

Provide an executive summary of the key activities undertaken in the period, the main outputs and the results achieved to date. Describe how your project rolled out compared to your plan. If you already have a project report that was written for other purposes, you may attach it.

REPORT ON PROGRESS TABLES:

The Activities, Outputs/Deliverables and Results/Indicators of Success tables have been pre-filled with information from your project plan contained in your approved application. Do not change the “due date” or “proposed” sections without seeking prior approval from IAF. For projects with multiple phases, these tables will provide a summary of the project from the start of the project to the end of the current reporting period. Do not delete past activities from your report and do not include activities that occurred after the end of the current reporting period.

Activities: Use the “Deliverables” section to indicate what has been achieved against what was proposed. Mark one box to indicate the status of what was proposed (Not Started, In Progress or Complete). If activities have not been achieved as planned, use the “Comments” section to explain why.

Outputs/Deliverables: Use the “Deliverables” section to identify products/outputs that have been generated as a direct result of the project (e.g., published production guide). Mark one box to indicate the status of what was proposed (Not Started, In Progress or Complete). If outputs/ deliverables have not been achieved as planned, use the “Comments” section to explain why.

Submit samples of all physical outputs (reports, technical production guides, plans, surveys, maps, videos, etc.) and communications materials (advertising, presentation materials, articles, media releases, media clippings, web pages, etc.) with your report. Include project photos if available.

TIP: Project deliverables and communications materials must include appropriate acknowledgement of the funding provided by IAF through programs it delivers on behalf of its funders. Please refer to the Funding Acknowledgement Guidelines provided to you with your legal agreement and contact us if you have any questions.

Indicators of Success: Use the “Deliverables” section to indicate the results that have been achieved to date due to the project activities. Mark one box to indicate the status of what was proposed (Not Started, In Progress or Complete). If results have not been achieved as planned, use the “Comments” section to explain why.

REACH AND COMMUNICATIONS:

Reach: Provide a brief commentary on the following:

- Identify the target groups to which you planned to disseminate project information (e.g. all 36 fresh table grape producers in BC). Against these targets, report on the number of producers/ firms that you have reached/served to date and the communication tools used.
- Identify project partners you are involving to reach your target groups and how they are assisting.
- Indicate if there are any specific communications challenges in reaching the target groups (i.e., few have email, they are geographically isolated, and/or their first language is not English) and how you are addressing these challenges.

Communications: Submit samples of all communications materials with your report (see Outputs/Deliverables above). Provide a brief commentary on the following:

- What did you do to communicate about your project and the results of the project?
- How did your communication activities contribute to the overall success of your project?
- Is there anything you would do differently next time?

FINAL COMMENTS:

Provide a brief narrative commentary on the overall success/challenges of the project that considers:

- Your overall perception of project success.
- Challenges or obstacles you encountered and what you have done or are going to do to overcome them.
- Lessons learned and recommendations. Is there anything you would do differently next time?
- Anticipated and unanticipated benefits to your organization, sector or participants in terms of outcomes beyond the original goals or activities.
- Your next steps and plans for continuing or changing this project. Will this project be sustainable in the future?
- The importance of the IAF funding to the project and any successes that were achieved.

Section 3: Project and Expenditures Report

We require a detailed budget reconciliation. Please ensure your report shows how you have used the IAF funds specifically as compared to the original, approved budget. Explanations should be provided for any variations from the approved budget.

Please be advised that should a substantial surplus in funding be reported at any phase, we may elect to release further payment only at such time as demonstrated that additional funds are required.

TIP: Unauthorized changes to your project budget may be outside your legal agreement with IAF and may not be eligible or approved. Do not wait until you submit a progress report or final report to bring budget changes to our attention. Contact your Program Manager at IAF to discuss changes as they develop. Once these changes are approved, your Program Manager will send you a revised Project Report template.

Reporting Period: This will be pre-filled for the first report that is required. For subsequent reports, please update the dates to match those in Reporting Period in Section 1: Cover Page.

Project #: This will be pre-filled in the template that is sent to you.

Project Outputs / Expenditure Areas: This section will be pre-filled from your approved application. Do not make any changes to this section of the report without seeking prior approval from IAF.

Budget Cash Costs: This section will be pre-filled from your approved application. Do not make any changes to this section of the report without seeking prior approval from IAF.

Actual Cash Expenditures: Record the actual cash expenses to the end of the current reporting period for each expenditure area. The numbers should provide the totals for the project from the start of the project to the end of the current reporting period.

Budget In-Kind: This section will be pre-filled from your approved application. Do not make any changes to this section of the report without seeking prior approval from IAF.

Actual In-Kind: Record the actual in-kind expenses to date for each expenditure area. The numbers should provide the totals for the project from the start of the project to the end of the current reporting period.

Deviations from Budget: If spending in any project expenditure area is more or less than anticipated within the budget, indicate the reasons and describe the impacts on the project.

Section 4: Report on Project Funding Section

Reporting Period: This will be pre-filled for the first report that is required. For subsequent reports, please update the dates to match those in Reporting Period in Section 1: Cover Page.

Project #: This will be pre-filled in the template that is sent to you.

Contribution Source: This section will be pre-filled from your approved application. Do not make any changes to this section of the report without seeking prior approval from IAF.

Budget Project Contributions: This section will be pre-filled from your approved application. Do not make any changes to this section of the report without seeking prior approval from IAF.

Actual Cash Contributions to Date: Record the actual in-kind contributions received to date for each of the named sources. The numbers should provide the totals for the project from the start of the project to the end of the current reporting period.

Deviations from Budget: If any sources of funding are significantly higher or lower than expected for the period, or additional sources were received, indicate the reasons and describe the impacts on the project.

Submitting Your Report

Refer to the Project Report Checklist provided to you by your Program Manager. It provides a good last check to ensure your Project Report includes all the information we will need to process your progress claim.

Please reference the Project Number of all correspondence. We prefer to receive Project Reports and accompanying materials together in one email. If you need to send a number of large files electronically, these should be sent separately in consecutive emails.

If you submit your report by email, please ensure that a copy of the Cover Page – complete with all of the necessary signatures – is sent to us by fax, mail or as a PDF.

If copies of physical outputs and samples of communications materials are not available electronically, they can be sent to:

Investment Agriculture Foundation of BC
PO Box 8248
Victoria, BC
V8W 3R9

Fax: (250) 953-5162

Continued Support and Guidance

Your Program Manager is available to provide help beyond the application stage and will assist you with any questions you may have about the reporting process, reporting templates, funding acknowledgements, etc. To ensure a timely response, please contact your Program Manager prior to the due date indicated in Schedule A of your legal agreement.