Final Year Grant Report: INSTRUCTIONS

NOTE: To complete your report, please use the Final Year Grant Report Form, not this instructions document.

Project #: Use the HCTF project number identified in your Grant Agreement. Example: 0-123. In addition, copy the project # into the document header.

Project Name: The name should be exactly the same as the name used in your Grant Agreement.

1. GRANT INFORMATION

Grant Agreement Year: This is the fiscal year of your report. Example: 2014-15

Conditional Grant Agreement (Contract) #:   CAT_____. Example: CAT15-0-123

Year Status of this Grant. For multi-year projects, identify which year this report covers, out of the total planned years of the project. This should be consistent with what you identified in the proposal for this year's project. Example: Year 2 of 3

Contract Extension: Identify if this project is a Contract Extension that was approved by HCTF. Note that your project and report are still identified by the original Grant Agreement Year, even if the activities undertaken were extended into the following year.

Project Leader: Name of project proponent / leader.

Organization: Project leader's organization or affiliation.

Contact Information: If HCTF has any questions about this report, provide an email address and phone number of the individual we can contact.

Report Author: Name of person writing this report, if different from Project Leader.

Organization: Author's organization or affiliation.

2. EXECUTIVE SUMMARY

Please keep concise; one page recommended maximum length.

Include 1 or 2 sentences on the overall project, for context:

- Project rationale – why are you doing this project;
- Purpose or goal including benefits to ecosystems or populations;
- Problems to be addressed and expected outcomes of this project;

Include 2 or 3 sentences on this year's work:
- Project objectives addressed this year;
- Brief summary of the current grant year accomplishments.

The Executive Summary is important because it provides context for the report – the report should be a stand-alone document so a reader can understand what the project is about without having access to any other information on the project. Readers include HCTF technical reviewers looking for progress on a project while reviewing proposal submissions for subsequent years of the project. It may also be used to assist HCTF in preparing articles on this project for newsletters, website, etc.

3. ACTIVITIES (Methods) COMPLETED

Referring to the "Objectives and Activities Summary" table in your approved proposal for this grant year, use the same objective/activity numbers and one-line descriptions to identify each objective addressed.

For each objective, provide a summary list of the specific activities that were undertaken and completed or partially completed.

4. MEASURES OF SUCCESS ACHIEVED

The outcome of each activity or deliverable should be measurable (i.e., performance indicators) to determine whether the activities undertaken have been successful and whether the objectives have been met. For each activity, report on the measures of success achieved. Again refer to your proposal for the measures that were identified, but if additional measures have been identified, include these.

Note that quantitative measurements are preferred for describing results of enhancement activities.

5. RESULTS AND DISCUSSION

Describe how the activities related to the objective(s) and the results of the activities in the above list (i.e., how they resolved or contributed to the resolution of the identified problem). If there are new activities added, please explain.

Were there any problems or unforeseen issues? How were these addressed? Explain how future activities will deal with them.

Indicate how the year's activities built on previous year's activities. Were your objectives for the year met, and how does this relate to the overall objective of your project?

Note regarding the submission of a technical report: Some projects (e.g., monitoring or assessment) may require an annual technical report that includes methods, results and discussion. If this is the case, you may submit the technical report and you don't have to fill out the "Results and Discussion" (section 5) of this Grant Report. However, **you still must submit a Grant report with all the other sections completed**.

6. COMMUNICATIONS/OUTREACH RESULTS

a. Project Outreach Activities

How were results of the project communicated to resource managers, community organizations, local governments, general public, etc.?
Briefly describe any public reaction to project objectives or activities. Include both positive and negative reactions.
List any publications (e.g. reports, brochures, pamphlets) that resulted from the project. Provide one copy to HCTF or a link to an on-line copy. Provide copies/links for press clippings, if available.

b. Communicating about HCTF

Describe how HCTF was acknowledged in the extension activities above. Identify any other opportunities this project provided to increase HCTF's profile in your region.

c. Communicating to HCTF about Your Project

This is an opportunity to "tell the story" about your project and to reach general non-technical audiences through HCTF's communication program. Check the HCTF website for example stories about projects we fund. Summarize what your project is about and what you accomplished this year (maximum 250 words) – this should not just be a repeat of your executive summary.

7. LITERATURE CITED

List any literature cited in this report. Avoid an exhaustive list of references that is not directly related to the activities carried out in this Grant year.

8. PHOTOGRAPHIC RECORD

Each report must include original, high quality photos (digital images are preferred; otherwise slides or prints and negatives) of any fieldwork components of your project. Digital photos must be at least 5-megapixel quality.

Particularly useful are "before and after" photos of habitat that is being enhanced. In addition, high quality photos depicting fish and wildlife in associated habitats are being sought for inclusion in HCTF Project Reviews and on the website. Project leaders are encouraged to keep this in mind when photographing their projects.

Note, all submitted photo images are to be made available free of charge to HCTF for the non-exclusive use in promoting HCTF.

9. FINANCIAL REPORT

Fill in all project expenditures in the appropriate section. The Financial Report has been designed to mirror the format of the budget section in your proposal as much as possible, for easy comparison of what was budgeted vs. what was spent – so, **it is important to review the project budget in your approved proposal.** At this time, there are no calculated fields in the report template. You will have to do all the arithmetic yourself, so please check this section carefully!

At the end of Section D (HCTF Expenditure Summary) there is a text field for "Additional Comments on Project Costs." Use this comment field to explain any significant variances between what was budgeted in this year's proposal and actual expenditures that you have documented in this Financial Report.

Similarly, at the end of Section E (Other Funding Partners) there is a text field for Additional Comments on Partner Funding." Where you can explain any variances between what you had requested from partners as identified in the proposal, and what you actually received or have had confirmed. Also, please explain how you have defined and monetized the estimate of in-kind contributions.

If you have questions on any part of the financial reporting, please refer to the HCTF On-Line - Application Instructions for additional guidance on specific budget lines, or contact the HCTF Finance Officer.

Final Invoice: Ensure the final invoice submitted balances to the total amount spent in the Financial Report.

10. Multi-Year Summary Report GUIDELINES

Introduction

***Purpose**:*
While Grant Reports provide information on results for the individual grant year, the Multi-Year Summary Report is a roll-up of all years of the project's current funding cycle. It is intended to be a stand-alone report that, for most audiences, may be the only information on the project's results and outcomes.
***Audiences**:*
1. *HCTF Board – to understand how HCTF funding contributed to conservation through this project.*
2. *HCTF Staff – for various program and information management needs.*
3. *HCTF contributors – to provide accountability for HCTF expenditures.*
4. *Other Project Leaders –to access references, lessons learned, recommendations from this project.*
5. *Public – this report will be made available on a publicly accessible publications list, such as EcoCat.*

Multi-Year Summary Report Content:
HCTF funds a wide variety of projects from on-the-ground enhancement activities to population and habitat inventory/monitoring activities. Projects that are very technical in nature will have different reporting requirements than other projects. In general, there will be two situations for HCTF reporting:
1. *Technical report produced – a technical report describes in detail the overall multi-year project methods, data analysis, results, discussion, and conclusions and may be one of the project's products. In this case, the Multi-Year Summary Report is intended to be adjunct to – and an overview of – the technical report findings. Technical reports may require more time to complete and are therefore not tied to the final payment. HCTF requires a copy of the technical report once it is completed. Ideally, HCTF would receive a copy of the project technical report attached to the Final Year Grant Report.*
2. *No technical report produced – the Multi-Year Summary Report should provide sufficient detail on the project techniques/methods used and the results for all years of this funding cycle, not just the final grant year that is reported on in sections 1 to 9.*

***Project Payment Holdback**:*
Previously, project leaders had a 6-month window to complete the final Multi-Year Summary Report. Now, by including it with the project's final year Grant Report, it is also due March 31st of the final year and it is now also subject to the 10% holdback associated with the final project payment.
*Some projects are more technical in nature and may require more time for data analysis – **contact HCTF if this is the case.***

Peer-reviewed journal articles:
Some projects may produce information that will be published in a peer-review journal. These articles do not constitute a final report, but are of interest to HCTF. We recognize that published journal articles take time for publication. Please send us a PDF copy of the published article or a link to the article, once it is available.

10. MULTI-YEAR SUMMARY REPORT (Instructions for Report Content)

A. Project Results and Outcomes:

i.   Provide a summary of the results for the overall project. Begin with a brief statement of the methods or techniques used to achieve the results. Relevant graphs summarizing data collected can be included, but as this is not a technical report, these should be limited in number and detail and pertain directly to the summarized results.

ii. Technical Report – If a technical report is produced for this project, please attach a PDF of the report. If not yet available, provide an expected date available in the Citation text box. Occasionally, the HCTF Multi-Year Summary Report cannot be adequately completed until the technical analysis and report is finished; in that case, please contact HCTF for an extension.

B. Lessons Learned:

i.   Describe any problems or challenges that arose during the project, especially those relating to the techniques used, the resources required or timing issues. How did you address these challenges in order to proceed with the project? Was a Project Change Request or a Contract Extension required to overcome the problem?

ii. What have you learned from this project that would be valuable for others doing this type of project to know about?

C. Conclusions and Recommendations:

i.   Provide a summary statement of goals and objectives achieved as well as those partially or not completed.

ii. Describe the mid- and long-term conservation outcomes expected to be achieved from this project. What would have to happen in order for these outcomes to come to fruition? In some cases the conservation outcomes may take years to achieve or understand. However, the original project proposal identified the issues and the problems to be addressed – in this report, describe how well the project has dealt with those issues. Provide a final statement: what difference did this project make for fish and/or wildlife conservation?

iii. Briefly list any recommendations resulting from the project.

D. Communications/Outreach Results:

i.   How were overall results of the project communicated to resource managers, community organizations, local governments, general public, etc.? Briefly describe any public reaction (positive or negative) to the project.

ii. Describe how HCTF was acknowledged in the extension activities above. Identify any other opportunities this project provided to increase HCTF's profile in your region.

iii. This is an opportunity to "tell the story" about your project and to reach a general non-technical audience through HCTF's communication program. Check the HCTF website for example stories about projects we fund. Summarize what your project is about and what has been accomplished overall.

iv. Provide a list of media articles that you have attached to this report.

E. Partner Contributions:

How much leveraging has HCTF achieved throughout this project? The information you provide on partner contributions in this table will help us determine how effective HCTF funding is in maximizing conservation outcomes for every dollar invested. For this reason, we also ask that you provide a reasonable estimate of in-kind contributions from project partners and define how you have monetized this estimate for the budget.

F. Other Comments

This is your opportunity to provide feedback to HCTF.

11. Submit your Final Year Grant Report

Final Invoice:

Note that if you do not submit your final invoice and this report together, there will likely be delay in payment – the report must be reviewed and approved by HCTF before the invoice can be paid, so we will hold back final payment until both documents have been received and approved.

We encourage you to contact HCTF if you have any questions about this Final Year Grant Report and your final invoice.

Submit your report to reporting@hctf.ca.