



FINAL MULTI-YEAR REPORT 2021 (2020 intake)

General Instructions

- Final reports must be submitted **on or before 4:30 pm Feb. 15th 2022** to the South Okanagan Conservation Fund.
- Acceptable forms of delivery include hand delivery, courier, or mail to: C/O South Okanagan Conservation Fund 101 Martin Street Penticton BC V2A 5J9 OR, email to **brynwhite@telus.net**
- The final report should not exceed the areas allotted. If submitting by email, entire report and supporting attachments should not exceed 7 MB in size.
- Supporting documentation and materials from this project are required (photos, brochures, designs, media, reports).
- All sections of the final report must be answered.
- Final payments and new applications will not be processed unless final reports are complete.

Section A – GENERAL INFORMATION

1. **Project Title** (as indicated in application): _____

2. Proponent

a) Legal Name: _____

b) Organization Registration #: _____

c) Mailing Address: _____ Postal Code: _____

d) Contact: _____

e) Telephone #: _____ f) Fax #: _____

g) Email: _____

3. Partner (if applicable)

a) Legal Name: _____

b) Organization Registration #: _____

c) Mailing Address: _____ Postal Code: _____

d) Contact: _____

e) Telephone #: _____ f) Fax #: _____

g) Email: _____

Section B – PROJECT INFORMATION CURRENT YEAR

1. Project Location: _____

(ie: municipality, electoral area, direction from major centre, etc.)

2. Total Project Value: _____

3. SOCF Contribution: _____

4. Non-SOCF actual cash and in-kind matching contributions: _____

5. Multiple year: _____

indicate how many years of funding- 2 or 3

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Section C – PROJECT SUMMARY FOR ENTIRE MULTI YEAR PROJECT

SOUTH OKANAGAN
CONSERVATION FUND

1. Please summarize what your project is about and what you accomplished over all years of the project.

Briefly describe the rationale, overall goals, conservation benefits, approach/methods to address the issue, as well as your multi -year accomplishments/results and how they contribute to the overall project objectives. Approx. 300 words (Without line breaks).

Section D – PROJECT DELIVERABLES FOR CURRENT YEAR ONLY

1. In the left hand column, identify the deliverables and activities of your project including any proposed targets/outcomes. In the right hand column, list the project accomplishments/results associated with each activity, including performance measures compared to proposed targets or outcomes identified in your proposal. Approx. 150 words per box (Without line breaks).

Deliverables	Results



Section D cont'd

Deliverables	Results

Deliverables	Results

Section E – FURTHER COMMENTS

1. Please provide any further comments including any changes to your proposed work plan, deliverables or accomplishments that occurred during the project (including what you may not have been able to complete). How did this project or this year’s work contribute to the overall project? Identify any problems or unforeseen issues and explain how they were addressed, not addressed or may be addressed in future. Approx. 300 words (Without line breaks).

Section F – FINANCIAL REPORT FOR CURRENT YEAR

Please fill in all expenditure information in the appropriate section below. For comparison, refer to the budget in your approved proposal.

APPROVED SOCF BUDGET = \$

TOTAL PROJECT COSTS AND REVENUES

Total Project Costs	Total Partner Amount	Total SOCF Amount

REVENUES: Other Funding Partners

To compare proposed to actual, refer to the Other Funding Partners section in your approved proposal.

Name of Organization	Proposed Cash	Proposed In-Kind	Actual Cash	Actual In-Kind	Total Actual Cash and In-kind
TOTAL All Funding Partners =					

EXPENDITURES

A: Labour Costs – account for all costs of the project *Human Resources:*

Labour, Contractor and Consultant Items

Position or Contractor i.e: Coordinator, qualified experts, consultants, subcontractors	Total Days on Project	Rate/Day	Cash	In-Kind	Total Exp (cash and In-kind)	Total SOCF Amount
SUBTOTAL ALL LABOUR COSTS (Cash and in-kind) =						

EXPENDITURES

B. Site/Project Costs – account for all costs of the project

Project Item	Description	Total Cash	Total In-Kind	Total Exp (cash and In-kind)	Total SOCF Amount
Travel					

Project Item	Description	Total Cash	Total In-Kind	Total Exp (cash and In-kind)	Total SOCF Amount
Capital Expenditures / Equipment Purchase					
Site Supplies & Materials					
Rentals (equipment, vehicle, helicopter)					
Work & Safety Supplies					
Repairs & Maintenance					
Other					
SUBTOTAL ALL SITE/PROJECT COSTS (cash and in-kind) =					

EXPENDITURES

C. Overhead/Administration – account for all costs of the project

Overhead and Admin. Items	Description	Cash	Total In-Kind	Total Exp (cash and In-kind)	Total SOCF Amount
Office space, utilities etc.					
Office supplies					
Printing/photocopying					
Administration fee*					
Sub-contractor admin fee (if not included in labour cost)					
Repairs & Maintenance					
Other					
SUBTOTAL ALL OVERHEAD/ADMIN COSTS (cash and in-kind) =					

Explain how you calculated the monetary value of in-kind contributions for all expenditures (e.g., for professional services identify how many hours or days and at what rate). Approx. 150 Words - Without line breaks

Explain how you calculated the Administration Fees* | Approx. 150 Words - Without line breaks

- Administration fees cannot be charged on equipment or capital purchases
- If direct overhead costs are being charged to SOCF (phone, office supplies, etc.), then there should not be an administration fee (% of eligible costs) charged.
- It is assumed that contractor/consultant overhead costs are included in their day rate. If their costs are billed separately, please outline this in the financial report.
- Applicants are encouraged to keep administration fees within the range of 10-13.5% against eligible costs, and provide an explanation of how the admin fee was calculated.

Capital Expenditures and purchases over \$1,000

Item Description	Serial Number	\$\$ Value	Location Stored	Contact

EXPENDITURES

D: Summary

Item Costs	Total Project	Total SOCF Amount
Labour Costs		
Project/Site Costs		
Overhead Costs		
TOTAL:		

Additional Comments on Project Costs:

Explain any significant variances or differences from the approved proposal budget (e.g., unspent funds, ap-proved budget changes). Approx. 150 words - Without line breaks

TOTAL ACTUAL PROJECT COSTS AND REVENUES

E: Multi-Year Finance Reporting: Report out on the total amounts for all years of the project added together.

Total Project Costs	Total Partner Amount Cash	Total Partner Amount In-kind	Total SOCF Amount

NOTE: Please include high quality photos (jpg - 300dpi) or other supporting materials (designs, media coverage, brochures,) as attachments.

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