

# Hawai'i State Foundation on Culture and the Arts

## Instructions for Completing Final Project Report

---

*Revised Instructions - Please read through carefully*

### Forms enclosed are:

- Final Project Report Form
- Request for Payment (Invoice)

### Check List

The final project report is due thirty (30) days after the project End Date in your contract and must include:

- A completed Final Project Report form (original only)
- A completed, itemized Request for Payment (Invoice) requesting final payment (original only)
- Program documentation
- A current tax clearance obtained from the State Tax Department and IRS stamp.
- Profiles of artists/professionals not included in contract proposal

### Request for Payment (Invoice)

Only the original, signed Request for Payment (Invoice) is needed. Be sure to itemize expenses as requested.

### Program Documentation

Submit adequate documentation to affirm that all activities took place in the manner and to the extent proposed. Include program materials such as printed programs, synopses of presentations, or schedules of classes/events; promotional materials such as public service announcements, press releases, and flyers; news articles; etc. Copies of publications or films funded must be submitted.

### Tax Clearance

Obtain tax clearance form from the State Department of Taxation, Taxpayer Services Branch, 830 Punchbowl Street (ground floor, center courtyard). A separate tax clearance is required for each project. Tax clearance must also include IRS stamp. Stamp is obtained from IRS office in the Federal Building across from the State Department of Taxation.

**Important** - *The tax clearance certificate is valid for only sixty (60) days from the date of issue. To prevent its expiration during the payment process, we suggest you wait until you are ready to mail all other final report materials before obtaining the tax clearance.*

### **IMPORTANT**

Contracts will not be prepared for organizations with overdue Final Project Reports.

Any errors in calculation or omitted information will result in the forms being returned to you for correction, thus delaying final report and payment processing. Any missing forms and documents will also delay processing.

Payment procedures will begin on the day all forms and documents have been verified by the Contracts Officer as complete and satisfactory, and payment will be mailed no more than thirty (30) days after.

If there are any questions, please call the Contracts Officer at 586-0302.

# Instructions

## HSFCA Final Project Report, Page 2

---

The instructions provided below correspond to numbered sections of the Final Project Report form.

### A. SFCA Project Code.

Enter the SFCA Project Code as indicated on the front page of your contract. This is the identification code you should use when calling or writing the SFCA about this project.

Project Title. Enter the title as indicated in your SFCA contract.

### B. Name of Organization.

The name of the organization provided here must be identical to that on your SFCA contract.

### C. Budget – Actual Expenses.

List the cash expenses for each item in the column “Total Cash Expenses,” and the portion of that billed to the SFCA in the column “SFCA Share.” Attach additional sheets if necessary.

#### 1 Personnel Costs (Employees)

- a Administrative.** Payments for employee salaries, wages, fees, and benefits specifically identified with the project, for executive and supervisory administrative staff, program directors, managing directors, business managers, press agents, fund raisers; clerical staff such as secretaries, typists, bookkeepers, and supportive personnel such as maintenance and security staff, ushers, and other front-of-the-house and box office personnel.
- b Artistic/Professional.** Payments for employee salaries, wages, fees, and benefits specifically identified with the project, for artistic directors, conductors, dance masters, composers, choreographers, designers, video artists, filmmakers, painters, poets, authors, historians, archivists, curators, sculptors, graphic artists, actors, dancers, singers, musicians, teachers, instructors, puppeteers, etc.
- c Technical/Production.** Payments for employee salaries, wages, fees, and benefits specifically identified with the project, for technical management and staff, such as technical directors; wardrobe, lighting and sound crew; stage managers; stagehands; video and film technicians; exhibit designers and fabricators; etc.

#### 2 Outside (Non-Employee) Fees and Services

- a Artistic/Professional.** Payments to firms or persons for the services of individuals who are not normally considered your employees, but who are consultants or the employees of other organizations, whose services are specifically identified with the project. Include artistic directors, directors, conductors, dance masters, composers, choreographers, designers, video artists, filmmakers, painters, poets, authors, historians, archivists, curators, sculptors, graphic artists, actors, dancers, singers, musicians, teachers, instructors, etc., serving in non-employee/non-staff capacities.
- b Other.** Payments to firms or persons for non-artistic services of individuals who are not normally considered your employees, but who are consultants or the employees of other organizations whose services are specifically identified with the project. These individuals serve in non-employee/non-staff capacities.

#### 3 Other Expenses

- a Space Rental.** Costs specifically identified with the project for rental of office, rehearsal, theatre, hall, gallery, and other such spaces.
- b Travel.** Costs of travel for individual(s) specifically identified with the project. Include number of persons and their travel destinations to and from, per diem payments, fares, hotel and other lodging expenses, taxis, gratuities, toll charges, mileage, car rental costs, ground transportation, etc.
- c Marketing (Promotion).** Costs of marketing/publicity/promotion specifically identified with the project. Include costs of newspaper, radio, and television advertising; printing and mailing of brochures, flyers, and posters; and space rental when directly connected to promotion.
- d Remaining Operating Expenses. Supplies and materials.** Costs of supplies and materials not entered in other categories and specifically identified with the project. May include scripts and scores, lumber and nails, paints and brushes, sets and props, costumes, and equipment rental.

# Instructions

## HHSFCA Final Project Report, Page 3

---

### D. Budget – Actual Revenue

#### 1 Fees Collected

**a Admissions and Fees.** Revenue received from the sale of admissions, tickets, subscriptions, memberships, etc., for events of the project.

**b Contracted Services.** Fees collected from the sale of services. Include the sale of workshops, etc., to other community organizations, government contracts for specific services, performance or residency fees, tuition, etc. Do not include SFCA share here.

**2 Private Corporate or Foundation Support.** Contributions received for this project by businesses and corporations or private foundations or a proportionate share of such contributions allocated to this project.

**Other Private Support.** Revenue received from cash donations to this project or a proportionate share of general donations allocated to this project. Do not include corporate, foundation, or government contributions.

**3 Federal Grant or Awards.** Revenue received from grants given for this project by agencies of the federal government or a proportionate share of such grants allocated to this project.

**4 State/Regional/County Support.** Support for this project received from agencies of the state, city, county, and/or multi-state consortium of state agencies or a proportionate share of such grants allocated to this project. List each source separately. Do not include SFCA share or SFCA share of another project here.

**5 Other Revenue.** Revenue received from sources other than those listed above. Include catalog sales, advertising space in programs, gift shop income, concessions, parking, sales of products, posters, T-shirts, etc.

**6 Applicant Cash.** Funds from accumulated resources, such as trust funds and savings, used for this project.

**SFCA Funds for This Project.** Enter here the amount you will be receiving from the State Foundation on Culture and the Arts for this project.

#### E. In-Kind Contributions

Volunteer services, donated supplies, etc., contributed to the project by outside parties at no cash cost to you and essential to the project's completion. Use categories corresponding to budget expenses (eg. Personnel-Administrative: Press Agent).

#### F. Project Period

Enter the dates that are indicated either on the SFCA contract under "Time of Performance" or on an approved amendment.

#### G. Description of Services Performed.

Use additional sheets, if necessary, to complete this section.

**1 Project Summary.** Provide a narrative summary of the project: what the activities were, who the artists or other professionals were, types of audience(s) (children, general, special needs, etc.), whether changes were made in the description of services as written in the contract. One or two sentences is an unacceptable description.

**2 List the activities** carried out with funds provided under the SFCA Contract, the dates and locations of the activities, and the audience size.

**3 Project Evaluation.** Evaluate your project based on the evaluation criteria given in your original proposal.

**a Evaluation Measures.** Indicate your evaluation measure and planned and actual figures.

**b Explanation of Variances and Evaluation Narrative.** Explain any differences between planned and actual. You may describe your evaluation in this section.

## Instructions

### HSFCA Final Project Report, Page 4

---

- 4 Number of Individuals Benefitting.** The total audience participants, students, etc. (excluding employees, contractors, and/or paid performers that directly benefitted from this project.
- 5 Number of Artists Participating.** The total number of artists directly involved in providing artistic or professional services specifically identified with this project.
- 6 Number of Professionals (Non-artists) Participating.** The total number of historians or other professionals directly involved in providing professional services specifically identified with this project.
- 7 Project Variance.**
- a Total Cash Expenses.** Identify planned and actual amounts.
  - b Total SFCA Share.** Identify planned SFCA share and actual SFCA share spent.
  - c Total Revenue.** Identify planned and actual amounts.
  - d Project Period.** FM in the dates for the planned project period and the actual project period.
  - e Explanation of Variances.** Explain any variances for parts 7a through 7d.
  - f Target Group(s).** List your project's target group(s) and the planned and actual numbers.
  - g Explanation of Target Group Variances.** Explain any variances that are more than 20%.
  - h Program Activities.** List your project's program activities and the planned and actual numbers.
  - i Explanation of Program Activities Variances.** Explain any variances that are more than 20%.
- 8 Additional information requested for federal reporting.**
- a** International Program
  - b** Traditions/Culture
  - c** Arts Education
  - d** Presenting/Touring
  - e** Number of Youth Benefitting

**Certification.** This should be signed by the director or administrative head of your organization with the full knowledge and approval of your board.