



REPORTING GUIDELINES

HEALTH PROMOTION SPONSORSHIPS – OVER \$5,000

Your report should be in two parts.

PART A – PROJECT REPORT

Please provide a short report (in brief point form) on your Healthway sponsorship using the following headings.

1. OVERALL OBJECTIVE(S)

Identify which of the following Healthway Health Promotion Sponsorship objective(s) your project set out to achieve:

- i) Healthy Participation -
- ii) Health Message Promotion
- iii) Structural Reform
- iv) Reduce promotion of unhealthy brands or messages.

2. STRATEGIES

Outline what was done to achieve the objective(s) and comment on whether the strategies used were successful/unsuccessful and why.

For Healthy Participation sponsorships include specific reference to participation numbers and the strategies used to increase the involvement of Healthway priority population groups.

For Health Message Promotion Sponsorships also include comment on the suitability of the health message and the leveraging/promotion activities of Healthway/health agency.

Where applicable please include measures of reach such as print media, TV and radio coverage and electronic media usage.

3. HIGHLIGHTS, PROBLEMS OR OTHER COMMENTS ON THE SPONSORSHIP

Please also include relevant supporting documentation with your Project Report, such as photographs, videos, copies of electronic marketing and promotional materials (showing promotion of the health message if relevant) and any media publicity.

PART B – FINANCIAL REPORT

Please provide a financial report that provides the following information:

1. Statement of income and expenditure for the project comparing the budget and the actual income and expenditure.
2. Notes explaining variations (10% or greater) from the budget. Where there are significant variations the note must clearly make reference to Healthway's approval for the change.
3. Generally, for projects up to \$25,000, financial statements are to be certified by the President/CEO of the organisation, or equivalent. However, additional reporting requirements may be inserted in individual contracts.
4. For projects over \$25,000, please refer to your Healthway Sponsorship Agreement for financial acquittal requirements. **All** financial statements are to be certified by the President/CEO of the funded organisation, or equivalent. Where audited financial statements are required under the Healthway Agreement then these must be certified by by an independent auditor who is a member of a recognised body and is not an employee or otherwise affiliated with the funded organisation. Alternatively, the audit requirement can be fulfilled by submitting a copy of the annual audited accounts of the funded organisation clearly showing the sponsorship payment from Healthway as a line item in or as a note to the accounts.

Following is a sample layout for a financial statement and examples of certification statements to assist in the completion of the financial report required by Healthway.

FINANCIAL STATEMENT

Explanations are required where actual expenditure for an item is above or below the budget proposal by 10% or more. It is not necessary to report on variations less than \$100.

EXAMPLE:

PROJECT NO: _____

PROJECT TITLE: _____

EXPENDITURE ITEM	BUDGET (\$)	ACTUAL (\$)	VAR (\$)	VAR (%)	NOTES
Venue Hire	1500	750	-750	50	Expenditure for venue hire was reduced as the project was scaled down to four performance days instead of eight. Incorporating afternoon matinees on low performance days offset this reduction.
Guest Passes	1500	2250	750	50	The saving of \$750 in Venue Hire was used to provide complimentary entry to aged and unemployed at the afternoon matinees. This change was approved by Healthway's Program Manager <NAME> on <DATE>.

CERTIFICATION OF ACCOUNTS

Healthway requires that financial statements are to be certified by the President/CEO of the organisation, or equivalent as per Example 1.

EXAMPLE 1

The accompanying financial statements for the sponsorship of Project No. <0000>, Project Title <xxxxx>, have been prepared from proper accounts and records and fairly represent the financial transactions of the project. At the date of signing, I am not aware of any circumstances which would render the particulars included within the statements misleading or inaccurate.

Signed: _____ Date: _____

Position Title

Or Title of Office: _____

Healthway requires that the financial statements for projects over \$25,000 (or where specified in Schedule 1 of the Sponsorship Agreement), must be certified by a professional affiliated auditor who is not an employee of the organisation and who does not hold any office connections with the funded organisation (Example 2).

EXAMPLE 2

I have audited the accounts of the <NAME OF ORGANISATION> in relation to the income and expenditure for Project No. <0000>, Project Title <xxxxx>.

In my opinion

1. The receipt and expenditure (and investment) of moneys have been in accordance with the contractual obligations imposed by Healthway upon <NAME OF ORGANISATION> and
2. The Statement of Income and Expenditure and notes thereto are based on proper accounts and present fairly the financial transactions of the project.

Signed by Auditor: _____ Date: _____

Name of Auditor: _____ Tel. Contact: _____