

## REPORTING GUIDELINES

Every grant is a learning opportunity, both for the grantee and for the Foundation. The final report is an opportunity to reflect upon the project's challenges and successes. Our greatest interest is in learning about the insight the organization has gained from receiving support for operations, capital, or from undertaking the project/program we have funded. Few projects/programs go exactly as planned, but any project/program can strengthen an organization if learning occurs. Your candor will help us to increase our understanding of the current and evolving challenges facing our grantees and the strategies they are using to overcome them.

We look forward to learning from your progress, challenges and successes. Following is the information required for both an **Interim Report** (Page 1) and **Final Report** (Page 2), whichever is applicable.

**If the report does not follow the format and addresses each numbered item, the report will not be accepted.**

Reports are to be emailed to us. Feel free to contact us if you have questions or require further clarification of our reporting procedures. Contact information can be located on Page 2.

### **Interim or Final Reports are to begin with the following information (list in order):**

Name of Foundation/Trust  
Type of Report (Interim or Final)  
Name of Organization  
Address of Organization  
Contact Name for Organization  
Contact Phone Number  
Contact Email Address  
Date of Award Letter  
Grant Amount  
Project Period (Indicated on Project Budget or in Award Letter)  
Grant Purpose (Indicated in Award Letter)  
List of Objectives (as stated in proposal)

### **INTERIM REPORT (if applicable):**

1. What challenges are you facing as you move forward with this project/program or support for operations? How are you approaching these challenges?
2. Have you revised your original objectives and/or projected budget since the project began? If so, why? What are your new objectives and/or budget?
3. What progress have you made toward achieving your objectives? Please address each stated objective.
4. Do you anticipate any difficulties in completing your project/program in the time frame outlined in your proposal?
5. Include with your report a detailed financial accounting of **ALL** funds received and expended, thus far, for operations or for the project/program; along with a financial accounting of how the Foundation's funds have been expended thus far.
6. **Report must be signed by the Executive Director and Board Chair/President.**

***(See Reverse <Page 2> for Final Report & Contact Information)***

## **FINAL REPORT:**

1. What was accomplished in connection with this project/program or support with operations? Address each stated objective separately. If any of the objectives or projected budget were changed, please explain the circumstances leading to the modification of the changes.
2. If your project/program involved people, teams, groups, etc., provide **UNDUPLICATED** “numbers” as to how many participated. Be specific.
3. What challenges did you face in connection with this project? How did you address these challenges?
4. What were the most important lessons learned?
5. What has changed within your organization as a result of this project/program; or as a result of operational support?
6. What unexpected benefits were gained as a result of the project/program/support?
7. Evaluation of the project/program – Provide information that addresses the following measures:
  - a. What method was used to evaluate the project/program? What was the effectiveness and ease (or difficulty) in the evaluation method used?
  - b. Process Measures – Assesses the extent to which the project/program as described is **actually** implemented.
  - c. Outcome Measures – Assesses the effectiveness of the project/program in meeting goals and objectives in terms of expected changes in the participants and/or community.
8. If you worked with a consultant or independent contractor what were the benefits and challenges? Did the value justify the expense?
9. If the project/program involved schools, name the schools, grade levels and number of students involved.
10. What advice would you offer to help another organization that is thinking about undertaking a similar project/program; or requesting support for operations?
11. Include with your report a detailed financial accounting of **ALL** funds received and expended for operations or for the project/program supported; along with a financial accounting of how the Foundation’s funds were expended. Any unexpended funds must be reported.
- 12. Report must be signed by the Executive Director and Board Chair/President.**

## **Contact Information:**

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