interim grant report guidelines: PLANNING

An interim report must be submitted by the date specified on the grant agreement, as described below.

**report elements**

* **Narrative report:** Address the following, in a sequence and with headings of your choosing. Note that there is no need to repeat yourself, should any of these questions encourage redundancy.
* List your stated objectives for this grant, and detail your progress against each objective.
* Explain any proposed adjustments to your stated objectives for this grant going forward. *Note: be sure to detail any proposed adjustments to the budget in the financial report, per below.*
* If applicable, list any other highlights from this period that you feel are important to share (e.g., new opportunities discovered).
* If applicable, how has the context for your work changed since this grant was awarded, and how has this affected the way you are thinking about or approaching this project?
* What challenges—internal and external—have you faced, and how are you addressing them?
* How do you expect the Foundation’s sunset to affect your organization/program/project? What, if anything, are you doing to prepare?
* What feedback/advice do you have for the Foundation? Please tell us at least one thing working well in your engagement with the Foundation, and at least one thing that could be better.
* **Financial report:** Provide the following. Your program officer will advise as to whether it is necessary to use the Foundation’s Project Financial Report Template.
	+ A detailed table of original project budget figures, actual revenues/expenses and variances to date, and if applicable, proposed budget adjustments and variances going forward
	+ Notes on any actual or proposed variances of more than 10% from the original budget
	+ If applicable, list of additional funds secured for the project
* **Additional required attachments:**
* Organization budget for the current fiscal year
* Audited financial statements for the most recent fiscal year
* **Other attachments that may be requested by your program officer, if appropriate:**
* Updated work plan

**formatting instructions**

* Use standard serif or non-serif fonts (e.g., Times New Roman, Calibri) and font size (10-12).
* Include page numbers and the date in the footer.

**SUBmISSION INSTRUCTIONS**

Please submit your report and attachments through the grants portal.