final grant report guidelines: planning

A final 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.
* Detail the key achievements of the full grant period in relation to your SMART objectives.
* If applicable, list any other highlights from the full grant period that you feel are important to share (e.g., new opportunities discovered).
* What challenges—internal and external—did you face, and how did you address them?
* What are the most important things you learned? If you could start over, what would you do differently?
* 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? Tell us at least one thing that worked well in your engagement with the Foundation, and at least one thing that could’ve been 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/revised project budget figures, actual revenues/expenses, and variances
  + Notes on any variances of more than 10% from the original/revised 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:**
* Work products (e.g., plans, tools, reports, etc.)

**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.