

Living Well Foundation

Grant Report Guidelines for Interim and Final Reports

Please Check one: **Interim Report** **Final Report**

SECTION A

Name of Organization: _____

Name of Executive Director: _____

Address: _____

Phone: _____ Fax: _____ Email: _____

Contact Person: _____ Title: _____

Name of person completing the report: _____

SECTION B

Project/program name: _____ Grant amount: _____

Purpose of grant: _____

Grant period: __/__/__ to __/__/__ Period covered by this report: __/__/__ to __/__/__

Signature of Executive Director: _____ Date _____

Typed or printed name and title: _____

NARRATIVE

SECTION C

1. Results – **Complete this section for both Interim and Final Reports**
 - a. List the original goals and objectives of the grant and tell how they were met during this reporting period. Please include specific outcomes included in your grant application. Charts, tables and/or other graphics may be helpful in communicating specific outcomes. Include the number of unique clients served during the reporting period.

- b. Describe current status on meeting any special terms of this grant as listed in the grant agreement document.
 - c. Variance from the original project plan often occurs. In what way(s) did the actual project vary from your initial plan? Describe how and why.
 - d. Describe any unanticipated benefits or challenges encountered with this project.
2. Lessons Learned – **Complete this section for the Final Report Only**
- a. What are the most important outcomes and “lessons learned” from this project?
 - b. How will you use what you learned to inform future work?
 - c. If you were to undertake this project again, would you do anything differently? If yes, please explain.

SECTION D – FINANCIALS - Complete this section for both Interim and Final Reports

1. Using the original budget included with your proposal, provide detailed expenses and income for the project for this period. If there have been approved budget changes, please include an updated budget form. Provide narrative on any variances from the original project budget.
2. Include a detailed, complete narrative accounting of how the specific grant dollars from this grant were spent.
3. Include a copy of the agency’s latest unaudited financial statement with the interim report (must be no older than 3 months).
4. Remember that yearly audited financial statements are due to the foundation based on your fiscal year.

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