

The Assisi Foundation of Memphis, Inc.
Grant Report Guidelines

Please submit one (1) copy of the report by the date on your Grant Agreement Letter.
Staple or clip pages of the report. Please do not place in any type of folder or notebook.

Please Check One: **Interim Report** **Final Report**

SECTION A

Name of Organization: _____

Name of Executive Director: _____

Address: _____

Phone: _____ Fax: _____ Email: _____

Contact person: _____ Title: _____

SECTION B

Project/program name: _____ Grant Amount: _____

Purpose of grant: _____

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

- General operating Project support Challenge grant
 Capital/endowment

Signature of Executive Director: _____ Date: _____

Typed or printed name and Title:

NARRATIVE

SECTION C (1)

Complete this section if you are reporting on a general operating grant.

1. Describe organizational and/or programmatic achievements and setbacks.

2. Provide list of changes (if any) to: Board membership, key staff, program project personnel, populations served, relationships/arrangements with other agencies.
3. Explain how you measured the effectiveness of your activities against your goals and objectives.

SECTION C (2)

Complete this section if you are reporting on a project, challenge or capital grant.

All:

1. Results

- 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.
- b. Describe current status on meeting any special terms of this grant (for example, challenges, contingencies, etc.)
- c. Variance from original project plans often occurs. In what ways did the actual project vary from your initial plans? Describe how and why.
- d. What difference did the grant make to your organization, in your community and for the population you are serving? Provide statistics (as appropriate) for numbers of people served, programs provided, services rendered.
- e. Describe any unanticipated benefits or challenges encountered with this project.
- f. Describe how collaborative or cooperative efforts with individuals and organizations affected outcomes. This could include planning, implementing, funding and/or evaluating this project/grant.

2. Lessons Learned

- 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. Are there recommendations you can make to funders or others working in this field? If so, please describe.
- d. If you were to undertake this project again, would you do anything differently? If yes, please explain.

3. Future Plans

- a. What is your plan for this project in the future? Briefly describe rationale for ongoing funding, expansion, replication or termination.

SECTION D—FINANCIALS

1. Using the original budget included with your proposal, provide detailed expenses and income for the project for this period. Provide narrative on any variances from the original project budget.
2. Include a detailed, complete accounting of how the specific grant dollars from this grant were spent.
3. Who else funded this project, and at what level?

4. If you are reporting on a general operating grant, submit actual end-of-year income and expenses for the organization for the year in which grant was used.

SECTION E—COMMENTS

Please share any thoughts about how our Foundation could have been more helpful, either in the funding process or in other ways beyond additional funding.