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Reporting Guidelines for Grantees

As indicated in the Grant Agreement, upon the Foundation's request narrative and financial reports must be submitted. When preparing reports, grantees may be directed to review the Foundation's website and FAQ's.

Grantees also shall provide the Foundation, upon request, with all information relating to such things as the results, findings or methods, and/or publications developed under the grant. The Foundation may withhold any future payments of the grant if it has not received all reports required to be submitted by Grantee. Any reports may be disseminated by the Foundation without the prior written consent of the Grantee unless otherwise agreed in the AAA-ICDR Grant Agreement.

If unusual circumstances arise that may occasion delays, grantees should promptly inform the Foundation. The Foundation may suspend and require the return of funds for delinquent or unsatisfactory reporting. All reports should be submitted electronically as MS Word and Excel documents, or as searchable PDF files, as instructed by the Foundation.

Reporting Components

During the grant term, grantees may be required to submit financial and narrative reports that are reviewed by the Foundation for compliance with the terms of the grant. Grantees also shall provide the Foundation, upon request, with all information relating to such things as the results, findings or methods, and/or publications developed under the grant. The Foundation may withhold any future payments of the grant if it has not received all reports required to be submitted by Grantee.

Any reports may be disseminated by the Foundation without the prior written consent of the Grantee, unless otherwise agreed in the AAA-ICDR Grant Agreement.

Depending on the size of the grant and as may be agreed upon in the Grant Agreement, grantees may be requested to describe and evaluate the activities undertaken and account for the use of grant funds during the reporting period using all or some of the following.

- a.** Description of the activities during the reporting period that sets forth:
 - a summary of the project and purpose of the grant;
 - progress made toward the expected outcomes of the grant and any other significant accomplishments;
 - any setbacks or challenges;
 - significant board, management, or staff changes;
 - plans and goals for the upcoming reporting period or, in the case of the final report, of the period subsequent to the grant;
- b.** List or description of any recent evaluations, publications, news articles, or other materials related to the grant;



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- c. Narrative explanation of any significant variances between proposed spending and actual spending in each category; and
- d. Signature of the Grantee or highest ranking individual responsible for the report, including date of execution.
- e. The financial accounting should include:
 - 1. The original amount of the grant, interest income earned, and the current remaining balance;
 - 2. The full project budget as originally proposed, or as agreed in an approved modification;
 - 3. Expenditures for the reporting period using the same expense categories set forth in the proposal budget; and
 - 4. The signature of a financial officer, including date of execution.

Grantees may be required to use the same budget categories and template used in the grant proposal for line-by-line comparison.

If a grantee determines that a change of grant terms is needed, it should consult with their Foundation Grants Administrator about the modification before submitting a report. After the initial inquiry, a written report will be required including progress to date, rationale for the request, details of changes against original agreement and financial accounting of project. **If the request is approved, the grantee is required to submit a revised Exhibit A to grant agreement to be signed by both parties.**

Collaborative Grants and Matching Funds

Grantees may be requested to report on the activities and expenditures of all collaborating organizations.