

Community Foundation of Greater Chattanooga, Inc.
Instructions for Preparing an Interim Grant Report

Progress reports are an opportunity to think about your program, your successes, and changes you might like to make to improve your program. Your reports not only inform us of your grant progress, but provide Community Foundation Program Staff with valuable learning experiences that enable us to grow, improve our funding process, and help other non-profit organizations at the same time. When appropriate, we share results and lessons learned. We rely on your candid responses to assist us in program planning. Please give us your honest thoughts about both the short-term results and the longer-term potential of the project for which funds were granted. We are as interested in what did not work as what did work – we all benefit by reflecting on lessons learned.

Recipients of grant support from the Community Foundation may be required to complete an *Interim Grant Report*, or a status report on projects in progress, before subsequent grant applications will be considered. Please keep in mind that Program Staff may request a post-Interim Grant Report site visit prior to completion of the Final Grant Report.

While there is no mandatory format, the Interim Report should include the following information:

Grantee Agency Name:

Program or Project Name:

Grant Purpose: (as it is stated in your Grant Contract)

Grant Amount and Date Approved:

Grant Contract No.: (as it is stated on your Grant Contract)

Organization Contact Person and Phone Number:

Date: (date report is submitted)

Grant Period covered in the Interim Report (specific dates (mm/dd/yr to mm/dd/yr))

Signature of person preparing the report

- A financial accounting using the budget from the original Grant Application. The financial accounting should compare proposed and actual project revenues and expenses. With respect to the actual revenues, include both the sources and the amounts. If actual expenses and revenues differed from the proposed amounts, explain the cause(s) of the difference(s). Finally, the financial accounting should itemize expenditures from the specific Community Foundation grant award for the reporting period. This report is a valuable guide for you to determine if your project is progressing according to plan or if you might need to make adjustments.
- One copy of any printed publicity about this grant
- Other attachments or anecdotes you feel are important

Then, the Interim Report should generally include a narrative discussion of the following points:

- Briefly restate your project description, community need being addressed, goals and measurable objectives. If the funds were for a capital project, please also include an explanation of the project status and provide copies of receipts, photographs, renderings, drawings or other appropriate documentation which will demonstrate progress toward completion of the capital project.

- For each objective, discuss progress made during the interim period towards achieving each objective. For this discussion you might consider, and if appropriate, include in your discussion the following:
 - the tools used to measure this progress
 - any problems encountered to date, and their solutions (planned or implemented)
 - lessons learned during the interim period
 - internal and external usage of the lessons learned during the interim period
 - impact of the outcomes achieved during the interim period on your efforts toward the long-term goals you identified in your Grant Application
 - audience served to date (include information on geographic area, gender, age, ethnicity and socioeconomic class)
 - collaborations or partnerships formed during this interim period and your plans to sustain those collaborations or partnerships

- Identify and explain the following:
 - the next phase of your efforts
 - whether the total proposed budget was raised, and if not, the adjustments made to project goals or process as a result
 - progression toward funding and sustaining project past the grant term

Keep in mind that a final grant report will need to be completed by the date indicated on the Grant Contract.

If you have any questions, please contact the Program Staff at 423.265.0586.