



GRANT REPORT GUIDELINES

This document contains guidelines for reports that are due as a condition of grants and contracts awarded by The California Endowment (The Endowment). Grant reports are a grantee obligation and report completion is considered when reviewing scheduled payments and new funding proposals. The maximum length of a report is ten (10) pages. Please complete Parts I, II and III in a separate Word document. Part IV should be completed using the expenditure report template.

Your answers to the questions below are designed to help The Endowment understand your progress made toward outcomes of the grant, how it was important to you and what you learned through implementing this grant. This information is important to The Endowment, and we encourage you to take the time to provide thoughtful responses.

Part I: Narrative (Interim and Final reports)

1. What progress has been made (activities, resources, evidence) during the reporting period toward the achievement of each outcome listed in the Grant Agreement? If progress was not made, please indicate why not.
2. Have you encountered any unexpected successes and/or challenges during this reporting period?
3. Are you requesting changes to any grant outcome or workplan? If yes, please list.
4. Have you identified or developed any additional materials (e.g., media, tools, surveys) that are helpful in communicating the value or context of the work? If yes, please list (do not submit materials unless requested by an Endowment Program Manager).

Part II: Narrative (Final reports only)

1. Did you meet the desired outcomes of this grant? If no, please explain.
2. Do you have any additional comments on, information about or highlights from your work and its impact on The Endowment's mission?

Part III: Organizational Information (Interim and Final reports)

1. Have you reconciled your bank accounts currently? If no, please explain.
2. Are you current on your payroll taxes? If no, please explain.
3. Have you made any changes to your board, staff or nonprofit status? If yes, please explain.



Part IV: Grant Expenditures (Interim and Final reports)

1. Have you attached an expenditure report (*use only The Endowment expenditure report template*) detailing the use of grant funds during the reporting period and listing expenditures for each line item in the approved budget? If no, please explain.
2. Was any interest earned on grant funds? If yes, were the funds applied to the approved project/program?
3. Are there are anticipated budget variances exceeding 20 percent of any line item in the Personnel or Non-Personnel categories, or under- or over-expenditures of any amount in the Other Cost category? If yes, please explain. [Applies to progress reports only]