

# WEINGART FOUNDATION

## REPORTING REQUIREMENTS AND INSTRUCTIONS

As a Weingart Foundation grant recipient you are expected to submit reports that document the progress made toward achieving the results targeted in your original application. Progress reports are **required** to be submitted **every six (6) months** beginning from the date of the award and continuing through the period grant funds are being utilized, with a final report due once **all** funds have been used **and** the project as proposed in the application have been completed. If the grant was awarded for the purchase of equipment or property, reports are due **one month after the purchase**. Your report to the Foundation is due on or before \_\_\_\_\_.

The Foundation recognizes that some grants, despite being well conceived and executed, will not achieve the desired results. Information about approaches that have not succeeded is also important and valuable to the Foundation.

Below is an itemization of the information that should be included with each report. Please use the attached form in writing your progress reports.

### **Interim Reports:**

- *Description of Project:* A brief description of the project for which the grant was made, including original project goals and objectives, as stated in your proposal.
- *Project Accomplishment(s):* Describe the progress you have made toward your original goals and objectives, including an assessment of the project's impact on those served, and the benefits derived from the grant by your agency. Include a comparison of actual versus original project goals.
  - If the grant was awarded for construction, where does the project currently stand in relation to the construction timeline and budget?
- *Problems Encountered:* List any problems, difficulties or challenges encountered, and their solutions (planned or implemented).
- *Future Plans:* If appropriate, describe how the project will be sustained. If the project will continue past the grant term, how are you progressing in obtaining other sources of support?

### **Accounting Summary:**

A line item accounting report should list the expenses related to the project, and it should be based on the project budget as presented in the original grant application submitted to the Foundation. **Please indicate the amount of Weingart funds spent-to-date.** You may use your own financial report format that at a minimum provides the information requested.

- If the grant was awarded for the purchase of equipment or property, provide a summary accounting for the expenditures, including copies of invoices relating to the grant. Indicate the percent of Weingart Foundation grant funds spent to date.

### **Final Report:**

Your final report should include the same information outlined above, summarizing your experience over the course of the **entire** project, as proposed in your application.

### **Modifications:**

In the event your organization wishes to make any changes that will materially alter the scope, timeline or nature of the project as originally proposed and for which the grant was awarded, **you must first submit a written request** for modification of the grant. Written approval must be obtained from the Foundation prior to the implementation of any changes or the grant may be rescinded.

# PROGRESS REPORT TO WEINGART FOUNDATION

DATE: \_\_\_\_\_

REPORT DUE ON: \_\_\_\_\_

FROM: \_\_\_\_\_

FILE NUMBER: \_\_\_\_\_

---

NAME AND TITLE OF PERSON COMPLETING PROGRESS REPORT

TELEPHONE NUMBER

FOR SIX MONTH PERIOD \_\_\_\_\_ TO \_\_\_\_\_

FINAL REPORT \_\_\_YES\_\_\_ NO

GRANT AMOUNT: \_\_\_\_\_

INSTALLMENT OF \$ \_\_\_\_\_

INTENDED PURPOSE OF GRANT:

---

**DESCRIPTION OF PROJECT:** (Briefly outline your original goals & objectives, as stated in your proposal)

---

**PROJECT ACCOMPLISHMENT(S):** (Describe the progress you have made toward your original goals and objectives including an assessment of the project's impact on those served and the benefits derived from the grant by your agency.)

# **PROGRESS REPORT TO WEINGART FOUNDATION**

---

**PROBLEMS ENCOUNTERED:** (List any problems, difficulties or challenges encountered, and their solutions.)

---

**FUTURE PLANS:** (If appropriate, describe how the project will be sustained.)

## **PROGRESS REPORT TO WEINGART FOUNDATION**

### **ACCOUNTING SUMMARY**

A line item accounting report should indicate the expenses related to the project, and it should be based on the project budget as presented in the original grant application submitted to the Foundation. If the grant was awarded for the purchase of equipment or property, please include copies of invoices. **Please indicate the amount of Weingart funds spent-to-date.**

You may use your own financial report format that at a minimum provides the information requested. Significant variances should be explained.

---