

Guide for Grantee Final Report

The Morgan Family Foundation adopted this reporting format in order to monitor the progress of grantees and build greater consistency in how grantees report on their learning and accomplishments. Your candid responses to the questions below will help us better reflect on the impact of your work and our grantmaking.

Please complete the form below and on separate pages answer the reflection questions (Section III) in narrative form. Please limit your responses to the reflection questions to a maximum of four (4) pages.

Attach the financial information as specified in Section IV. If you have any questions please contact us.

I. Grant Information

Organization Name _____

Grant Purpose (2-3 sentence description from award letter) _____

Date of Grant _____ Amount of Grant _____

II. Contact Information

Signature of contact person regarding this report _____

Print Name _____ Title _____

Phone _____ Email _____

III. Reflection

1. Describe the progress you have made towards achieving the original goals of your grant. Include the impact it made on your organization, community, and population served.
2. Describe unanticipated outcomes, benefits, or challenges that you encountered in the course of completing your goals.
3. What are the most important results/lessons you have learned?
4. If you were to undertake this project again what would you do differently?
5. What are your future plans for sustainability? Briefly describe your rationale for expansion, replication, or termination.

IV. Financial Reporting

1. Using the original budget included with your proposal, provide an itemized account of actual expenses and income for this period. Provide narrative on any variances of 10 percent or greater from the original project budget.
2. Who else has funded this project, and at what level?

Please email report to info@morganfamilyfdn.org or mail two copies of this report (including two copies of the financial documentation) to the address below.

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