

Final Report Guidelines

Please identify your grant using the organization (grantee) name and the grant number. These can be found in the grant agreement with the Foundation.

Please email your report to your program officer or program associate. If you have any questions email your program officer or program associate, or call the Foundation at (650) 887-0277.

Checklist

Your report needs to contain the following components. Please do not combine documents.

1. **Final Narrative** (in Word, preferred)
2. **Final Financial** (in Excel, preferred)

For general support requests, a final financial is not required. Please just confirm that that all grant funds have been spent.

1. Narrative Report

- **Project Activities and Goals**

- Please briefly describe the main purpose(s) of your project and the time period that is covered by this report.
- Did you accomplish what you set out to achieve in your original plan? Compare your progress against the goals or activities that you included in your original proposal.
- What do you see as your successes in the project?
- What challenges did you encounter? How did you address them?

- **Personnel**

Were there any changes in personnel that affected the project?

- **Organizational Changes**

Were there been any changes in the organization (independent of the particular project for which you received funding from the Foundation) that you would like to share with us?

- **Changes in the Field**

Were there changes in the field that influenced your plans for this project or the organization (e.g., new legislation passed; new regulations established; steeper-than-expected budget cuts)?

- **Sustainability**

What are the prospects for sustainability of this project?

- **Reflections for the Future**

What do you think should be the next step for this work, based on lessons learned, emerging issues or changes within your organization, or new trends in the field? What would you like

to see your organization undertake? What do you think the Foundation should consider as next steps for its grantmaking in this area?

2. Final Financial

- Please include a financial accounting of funds spent over the whole project, comparing the budget included in your original proposal with actual funds spent.
- Did you raise additional funds for the project? If so, how much, from what sources, and for what purposes?
- For general support requests, a final financial is not required. Please just confirm that that all grant funds have been spent.

Note: if you have a balance at the end of your grant, please contact your program officer to determine the best next steps.
