

VICTORIA FOUNDATION

Instructions for Interim Grant Report

Victoria Foundation requires all grant recipient organizations to submit an Interim grant report as outlined below. The Foundation is interested in the implementation of your program as well as your impact on the targeted community. **Your report should correspond to the information provided in your proposal, as well as the benchmarks listed in the Foundation's award letter.** For instance, the financial report should use the same line item names as the proposal budget and the report on accomplishments should refer to the goals set forth in your proposal or in the Foundation's award letter.

Please see your grant letter for the due dates for your Interim grant report.

Your **heading** should include:

Organization name, address, etc.	Month/year grant was received.
Contact Person	Grant amount
Purpose: (from your proposal)	

Your **narrative report** should give the history of the grant over the course of the reporting period, including any pertinent statistics. The following points should be addressed:

- List the benchmarks delineated in the Foundation's current award letter.
- Describe the activities conducted in achieving your listed benchmarks. Please describe any challenges you faced in meeting these benchmarks. What steps did you take, or plan to take in the future, to address these challenges?
- How did your program impact your targeted population? How do you measure these impacts?
- Did you secure enough funding to implement your program as you originally intended? If not, how did your program design change? Please list your other funding sources for this project, including specific amounts from each source.
- Based on your experiences to date, what changes, if any, do you anticipate moving forward?
- Please describe any significant organizational changes that occurred during the reporting period, for instance, staff changes, relocation, etc.

Your **financial report** must use the line items of the budget presented in your proposal and use the "budget vs. actual" presentation style. (See our sample budget on the Foundation's website www.victoriafoundation.org/How to Apply/ Sample Agency Operation Budget or Sample Non-Profit Project Budget) Your financial report must include income as well as expenses for the reporting period.

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Audited financial report (for your entire organization, not for this grant separately) are required for each fiscal year in which your organization holds funds from this grant in its accounts. For instance, if the grant check were cashed in December, and your fiscal year ended December 31, we would require an audit for that year. Assuming the project proceeded to unfold during the following year, we would require an audit for that following year as well. Normally, grant funds would have been exhausted in that following year, but if there were funds that were carried into the next year after that for some reason, an audit would be required for that year as well.