

Edyth Bush Charitable Foundation, Inc.

Progress and Final Report Guideline

In accepting a grant from the Edyth Bush Charitable Foundation, your organization agreed to provide the Foundation with progress and final reports of information. It is helpful to us to receive a progress report at least every six months, or when you may experience a substantial change in the program or in key personnel. Your organization should provide a final report within three months of expending all grant funds, or when the project is completed, and no further payments are provided under the terms of the grant. We offer the following as a guide in preparing these reports.

Progress Report Guideline

1. A description of what has been done under the grant and what state of completion has been reached with respect to the projects set forth in the grant request, and the overall project.
2. What remains to be done on the specific grant request, and on the overall project?
3. How much money has been spent, and for what, listed by general expenditure categories? This can be consistent with the manner in which you keep your books or preferably broken down more in detail so it would be informative to a reader not familiar with your operations.
4. If there are any funds remaining to be spent, how soon do you expect to spend them, and whether there will be any funds left over to be reimbursed to this Foundation?

Final Report Guideline

1. A full financial report on the use of the grant funds. This should be a breakdown by categories useful to a person not familiar with your operations, together with a check-by-check listing of the disbursements charged against the grant. Please list the check number, date, payee, and purpose, and the amount, giving a total. This should balance with the total shown in the category financial report.
2. A description of what has been done under the grant and what state of completion has been reached with respect to the projects set forth in the grant request, and the overall project.
3. What remains to be done on the specific grant request, and on the overall project?
4. A summary of results obtained, and an evaluation report on what the grant funds accomplished in your opinion, including any negative remarks or constructive self-criticism which you may feel is appropriate. The purpose of this evaluation is to help both your organization and this Foundation in analyzing the value of this type of grant for future reference and to assist us in making a post-grant review of the grant.