GRANT REPORT GUIDELINES

All Sunflower Foundation grants require formal reporting by the grantee to the foundation on the status and/or accomplishments of the grant, as compared to the approved grant proposal, including project budget and scope of work. These reports are classified as either the Progress Report (see this page) or the Final Report (see page 3). The number of Progress (i.e. interim) Reports required depends on the length and complexity of the grant project; one Final Report is required of each grant. Grant report requirements and due dates are specified in the Letter of Agreement (grant contract) issued to the grantee by the Sunflower Foundation. Details on the specific requirements of both the Progress Report and the Final Report are below. The Submission Instructions for all grant reports are provided at the end of this document (see page 5).

Progress Report

The Progress Report is an interim report on the status of your grant project. This report should cover the period from the beginning of the grant to the date of the Progress Report or, in cases where more than one Progress Report is required, the period since the last Progress Report. Note that all report requirements are specified in the Letter of Agreement.

The required components of the Progress Report are defined below. If you have questions regarding these instructions, please contact the program officer assigned to your grant or Cheryl Bean, the foundation’s finance director.

- **PROGRESS FINANCIAL REPORT** – An interim report on the approved Project Budget (a copy of the approved grant budget is attached to the Letter of Agreement). This financial report should compare, in the columns provided, the project’s approved budget by line item against the amount expended to date in each category, with a calculation of the balance. Please use the available Grant Financial Report Template for all financial reports. This report is available on the foundation’s Web site: [www.sunflowerfoundation.org](http://www.sunflowerfoundation.org) (see the Downloads & Forms tab), or by contacting the foundation office. Note: This form is updated from time to time and may vary somewhat from the format of your original Project Budget. Please include a narrative
(label as “Progress Financial Report Narrative”) with the Progress Financial Report that explains the expenditure of all grant funds during the time covered by the Progress Report.

Important Note: Be sure to review the provision in the Letter of Agreement regarding variances to the approved Project Budget. Additionally, if, at any point during the term of your grant, you become aware that you will have an unintentional grant balance remaining, please do not wait until submitting your required financial report(s) to notify us. Rather, we request that you immediately contact us with details as to what caused the situation and suggestions as to how the unspent funds could be used to further enhance the approved program or scope of work.

• PROGRESS NARRATIVE REPORT – An interim narrative report on activities to date related to the approved grant project scope of work. In a narrative format, please provide an overview of the progress of the grant project, including, but not limited to, answers to the questions below that apply to your funded project. Note: These questions are intended to relate to the components of your project Logic Model. Please label your responses numerically to match this outline. If your application did not require you to submit a Logic Model, we still request that you include responses to the questions outlined below in your report.

1. Objectives (should be concrete, specific, measurable and achievable)
   a. Describe the objectives for this project.

2. Resources (personnel, consultants, materials/supplies, etc. dedicated to or consumed by the project)
   a. What resources did your organization dedicate to your grant project during this report period?

3. Activities (steps necessary to achieve project objectives – include a timeline for each activity)
   a. What were your key activities for this reporting period (include a timeline)?
   b. How did these activities help you achieve or move closer to your project objectives?
   c. What activities to date have been most effective? Least effective? What, if anything, would you have done or do you plan to do differently?
   d. What problems or obstacles have you encountered in this reporting period?
   e. What constituencies did your project target during this reporting period?
   f. Describe the number of persons served by the project during this reporting period (staff, clients and/or users of project services; include as much demographical data as possible; also include partnering organizations involved, policy-makers informed, etc).

4. Outcomes (measurable changes in the condition, knowledge, attitudes, behaviors and/or skills of project participants or beneficiaries)
   a. What short-term outcomes has your project achieved to date (e.g. changes in conditions, knowledge, attitudes, behaviors, skills, etc.)?
b. If you told us your project would serve as a pilot, or would be replicable to other locations, what steps are you taking at this point in your project to plan for replication?

c. Is there anything else about your grant project and/or the grant process that you would like to share?

5. Impact (on the organization, community and/or system)

a. Though early in the project’s history, describe any indicators to date of lasting impact from the project.

b. Identify any factors or conditions that have changed over this reporting period that have had impact on your project, positively and/or negatively (e.g. staff changes, timelines, funding, etc.).

**Final Report**

The Final Report should be a cumulative report reflecting the entire grant period, not just the period since the last Progress Report. The due date for the Final Report is specified in the Letter of Agreement. Required components of the Final Report include the Final Financial Report and the Final Narrative Report, both explained in detail below. If you have questions regarding these instructions, please contact the program officer assigned to your grant or Cheryl Bean, the foundation’s finance director.

- **FINAL FINANCIAL REPORT** – A final report on the approved Project Budget (a copy of the approved grant budget is attached to the Letter of Agreement). This financial report should compare, in the columns provided, the project’s approved budget by line item against the amount expended in each category, with a calculation of the balance. Please use the available Grant Financial Report Template for all financial reports. This form is available on the foundation’s Web site: [www.sunflowerfoundation.org](http://www.sunflowerfoundation.org) (see the Downloads & Forms tab), or by contacting the foundation office. If a grant is awarded for a term of two or more grant years, please complete this form for each grant year and provide one form that reflects the entire (cumulative) grant project. *Note: This form is updated from time to time and may vary somewhat from the format of your original Project Budget.*

The Final Financial Report should also include a narrative (label as “Final Financial Report Narrative”) that explains the expenditure of all grant funds during the term of the grant. Additionally, grantees must attach copies of all receipts for expenditures for goods and services acquired through grant funds, if not previously submitted. *Note: Receipts for such items as payroll expenses are not required; for questions about receipt requirements, please contact the foundation’s finance director, Cheryl Bean (cbean@sunflowerfoundation.org).*

- **FINAL NARRATIVE REPORT** – A comprehensive final narrative report covering the entire term of the grant. Please respond to the questions below in preparing your Final Narrative Report; additional comments, observations or suggestions are also welcomed. *Note: These questions are intended to relate to the components of your
project Logic Model. Please label your responses numerically to match this outline. If your application did not require you to submit a Logic Model, we still request that you include responses to the outline below in your report.

1. Objectives (should be concrete, specific, measurable and achievable)
   a. Describe the objectives for this project.

2. Resources (personnel, consultants, materials/supplies, etc. dedicated to or consumed by the project)
   b. What resources did your organization dedicate to this project during the term of the grant?

3. Activities (steps necessary to achieve project objectives – include a timeline for each activity)
   a. What were the key activities involved in the implementation of your grant project (include a timeline)?
   b. How did these activities help you achieve your project objectives?
   c. What activities have been most effective? Least effective? What, if anything, would you have done differently?
   d. What problems or obstacles did you encounter during the term of the grant?
   e. What constituencies did your project target? Describe the number of persons served by the project (staff, clients and/or users of project services; include as much demographical data as possible), partnering organizations involved, policy-makers informed by this project, etc.
   f. Were consultants used in the implementation of this project? If so, were their recommendations implemented? Why or why not? Would you use the consultant(s) for a future project and/or recommend them to colleagues?

4. Outcomes (measurable changes in the condition, knowledge, attitudes, behaviors and/or skills of project participants or beneficiaries)
   a. What long-term outcomes are expected? Were there any unanticipated outcomes that have already become evident?
   b. What were the strengths of the project? The challenges?
   c. What changes in knowledge, attitudes, behavior and skills did you find among staff, clients, industry/field?
   d. If you told us your project would serve as a pilot, or would be replicable to other locations, what steps are you taking at this point to plan for replication?
   e. If your project was intended to be sustained beyond Sunflower Foundation funding, please list and describe any funding strategies you have developed to sustain your project (e.g. other grant applications, fundraising campaigns, new sources of revenues, etc.), and the extent to which each has been successful.

5. Impact (on the organization, community and/or system)
   a. What do/did intended users think about the project? What was most helpful to them?
   b. To what extent did the project meet the needs of the target population served by the organization?
c. To what extent did the project change economic, environmental, policy and/or productivity issues affecting your organization/target population?

d. To what extent and in what ways did the project improve your organization (consider ultimate goals of the organization, side effects, target population, social and economic consequences)?

e. To what extent did Sunflower Foundation support affect the implementation and outcomes of the project?

f. From your perspective regarding this experience, what are the most compelling reasons, if any, that the Sunflower Foundation should continue funding in this program area?

g. We recognize that the grantmaking experience is a continual learning opportunity for both our grantees and the foundation. We invite/encourage you to share anything about your grant project and/or the grant process that would inform our work and effectiveness.

Submission Instructions

All reports must include a completed and signed Grant Report Cover Page. This form is available on the Sunflower Foundation Web site: www.sunflowerfoundation.org (see the Downloads & Forms tab), or upon request from the foundation. Reports may be submitted in hard copy format, as email attachments or faxed. Note that, regardless of format, all reports require signatures; electronic signatures are accepted. If submitted in hard copy format, only one copy is required of each document.

Whether in electronic or hard copy format, please send all report documents to Alisa Browning, operations manager: abrowning@sunflowerfoundation.org; fax 785.232.3168; or Sunflower Foundation, 1420 SW Arrowhead Road, Suite 2N, Topeka, KS 66604.

For any questions about these guidelines or the reporting requirements, please contact the Sunflower Foundation staff at (785) 232-3000 (local) or (866) 232-3020 (toll free).