

Josiah Macy Jr. Foundation
Macy Faculty Scholars Program
Scholar Reporting Guidelines
Annual Reports

During the two years of support under the Macy Faculty Scholars Program you will have several opportunities to report on both your career development and funded project. These opportunities will occur at each annual meeting of the program and after the completion of each year of support.

Annual Program Meeting Report

Each spring at the annual meeting of the program you will present to fellow scholars, the program's National Advisory Committee, and Macy Staff the **results of your funded project**. Prior to the meeting, we will provide you with details outlining the structure, format and length of your report. The report will be delivered in both written and oral presentations.

Annual Narrative Report

The Annual Narrative Report, due in the fall, is a progress report focusing on your **career development activities**. In this report you should describe what steps you have taken, or activities that have occurred to promote your career. These may include, among other things; new responsibilities, attendance and/or presentations at meetings and conferences, publications, and development of new course materials. You should also indicate key people whom you have engaged to provide guidance and advice. We are also interested in learning whether you believe you are on a solid trajectory and what more can be done to further enhance your career. If you have specific plans for the coming year please tell us about them. Finally, indicate any other information or activities that will impact your career.

Annual Financial Report

This is an official financial statement of expenditures under the grant. The Annual Financial Report must provide an accounting of expenditures that correspond to the line items in the budget submitted by the scholar and approved by the Foundation. Transfers of funds by the scholar among line items require prior written approval by the Foundation. In some instances, particularly during the first year, there might be a rationale for a carry forward of unspent funds. If so, please submit a letter as to why it is necessary and the amount of the carry forward. Any other unexpended funds remaining at the end of each grant period may revert back to the Foundation and/or may be deducted from the next installment due. At the end of the grant period or any extensions thereof, all unexpended funds will be returned to the Foundation.

For multi-year grants, subsequent payments will be issued after receipt and the satisfactory review of the annual reports by the Foundation. Annual reports are carefully reviewed by the staff of the Foundation and continuing support of the project is contingent on satisfactory progress toward meeting the original objectives in the approved grant.

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Final Reports

Final Narrative Report

At the completion of your scholar award we require a final narrative report of the project. The Final Narrative Report is considered a free standing report; a document from which any reader, without consulting other sources such as previously filed annual reports could understand the career development that has occurred, as well as, the funded project's design, implementation, results, and implications for the future. The Final Narrative Report provides you the single opportunity to record the entire story of your funded work, so approach it with care and thought. Your results are important to us and we may choose to assist you by further disseminating them on our web site and through other social media avenues.

The Final Narrative Report should be comprehensive, but ideally not exceed 20 pages in length. It should cover the entire period of your scholar award, including any extension if applicable. The report consists of two sections. The first section focuses on **career development** and should address what steps you have taken or activities that have occurred to promote your career. These may include, among other things; new responsibilities, attendance and/or presentations at meetings and conferences, publications, and development of new course materials. You should also indicate key people whom you engaged to provide guidance and advice. We are also interested in learning whether you believe you are on a solid trajectory and what more can be done to further enhance your career.

The second section focuses on the **funded project**. We ask that you structure this section of the report to include the following elements:

- a. A clear, concise statement of the objectives of the project as outlined in the original proposal;
- b. A brief statement of the work you initially planned to undertake to achieve the project goals; the activities you conducted throughout the project and how they compare to the original work plan. Be sure to include any changes you made due to any problems encountered along with lessons learned that will prove helpful to others in the field.
- c. Provide any other factors affecting your project results;
- d. A description of the information you have or products you have generated as a result of project activities with specific quantitative data where possible. Examples include papers, course materials, websites, and other tangible products. In addition, we ask that you submit copies of these products.
- e. It is important to indicate change(s) and impact that your project is creating with its original target audience(s).
- f. Report how this work will be sustained, if applicable, beyond the grant period.
- g. Report activities you are undertaking or plan to undertake around dissemination of products and/or results.

Lastly, please note, as a Macy Scholar we want to hear from you beyond our funding. We would appreciate if you would let us know if there are subsequent products or information generated from/about the project. You can submit them at any time as addenda to the final report.

Final Financial Report

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