

Josiah Macy Jr. Foundation
Grantee Reporting Guidelines
for Board Grants
Annual Reports

The Josiah Macy Jr. Foundation requires for each year of funding an annual report of the project by its grantees. The report consists of two sections: a narrative program report of the project and an official financial statement of expenditures of the grant.

The annual narrative program report ideally should not exceed 10 pages in length and should address the specific elements of the program described in the proposal. This report should concisely include the following:

- State the objectives of the project as outlined in the original proposal;
- Briefly restate the work you initially planned to undertake to achieve the project goals; the activities you conducted and how they compare to the original work plan. Include any change you have made or need to make due to any problems encountered. Indicate whether you are on schedule, ahead of schedule or behind schedule.
- Describe and submit information you have or products you have generated as a result of project activities with specific quantitative data where possible, for example, papers, course materials, websites, and other tangible products.
- Indicate change(s) your project is creating with its original target audience(s). What change(s) do you project will occur by the time the project is completed.
- Report how this work will be sustained, if applicable, beyond the grant period.
- Report activities you are undertaking around dissemination of products and/or results.
- Report your goals and milestones for the coming year and how they compare to what you originally planned.

For multi-year grants, subsequent payments will be issued **after** receipt and the satisfactory review of the annual report 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.

Official Financial Statement of Expenditures

The financial report must provide an accounting of expenditures that correspond to the line items in the budget submitted by the grantee and approved by the Foundation. Transfers among line items of each approved budget are limited to a maximum of \$2,000 or 15% of the approved line items, whichever is greater. Transfers of funds by the principal investigator among line items in excess of these amounts 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 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, all unexpended funds will be returned to the Foundation.

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Final Reports

Final Narrative Report

At the completion of your grant funding 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 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 grant period including any grant extension if applicable and should address the specific elements of the program described in the proposal. In preparing the Final Narrative Report we ask that you structure it 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, for example, 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 grantee 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

This is an official financial statement of expenditures under the grant. The Final Financial Report must provide an accounting of expenditures that correspond to the line items in the budget submitted by the grantee and approved by the Foundation. Transfers among line items of each approved budget are limited to a maximum of \$2,000 or 15% of the approved line items, whichever is greater. Transfers of funds by the principal investigator among line items in excess of these amounts require prior written approval by the Foundation.

At the end of the grant period, all unexpended funds will be returned to the Foundation.