

Josiah Macy Jr. Foundation
Grantee Reporting Guidelines
for President's Grants
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.