

# The Harder Foundation Grant Report Checklist

We recognize that you are submitting a final report before the end of your grant period, but it is helpful to us to have reports before we invite a new proposal. Please report as thoroughly as possible and include this checklist with your final report. *All documents are to be submitted by hard copy and must meet our Postmark Deadline.* See your Grant Agreement Letter for your reporting deadline.

## 1. NARRATIVE REPORT (no more than 8 pages):

- Please address these questions in your report
  - a) Environmental outcomes are important to us. How well did you succeed in achieving the objectives articulated in your grant proposal?
  - b) We are also interested in what you learned from your experience. What challenges did you face? What went well and what went wrong?
  - c) Who were you trying to influence?
  - d) How has your work complemented and leveraged the work done by others, including key constituencies? With whom did you collaborate? Was that collaboration effective?
  - e) To what degree have you made progress toward strengthening your organizational effectiveness? During the grant period, were you able to improve staff and board leadership, fundraising ability, administrative and management capacity, and fiscal health?
  - f) What comes next in terms of this project's/ program's goals, and how are you positioned to raise funds to achieve them?

## 2. FINANCIAL REPORT:

All grant reports must include:

- Income and Expense Statement for the organization year to date, broken down by program if possible. Include all sources of funding, e.g. membership, major donor, foundation grants, and government sources.
- Please include information that describes how your actual expenses aligned with your original projected annual budget.

Project grants must *also* include:

- Your original budget projection (submitted with your grant proposal) and your actual revenue and expenses to date for the project.

- Any major discrepancies between the projected budget and the actual expenses for the project. We realize that you may not have spent your entire budget at the time you submit your report, but please let us know if you're on track.
- Revenue reporting should include a list of all other sources for this project, unless The Harder Foundation was the only source. Please indicate specific foundation sources as well as other revenue sources, e.g. membership, major donor, and government sources.
- If you incurred 501 (h) election-related lobbying expenses, and a portion of the project for which this grant was made involved lobbying, please confirm in your report that The Harder Foundation grant funds were *not in excess* of the non-lobbying portion of your project budget.