



Interim Report Guidelines

Please identify your grant using the organization (grantee) name and the grant number. These can be found in the grant agreement with the Foundation.

Reports for fiscally sponsored grants need to be submitted by the fiscal sponsor or include a cover letter from the fiscal sponsor indicating its review and approval of the report.

Please submit your report via our online portal, or, if you have not been set up with portal access, email your report to your program officer (PO) and program associate (PA). If you have any questions email your PO or PA, or call the Foundation at (650) 887-0277.

Checklist

Your report needs to contain the following components. Please do not combine documents.

1. **Interim Narrative**
 2. **Interim Financial** *N/A for general support grants.*
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1. Interim Narrative

- **Project Activities and Goals** *N/A for general support grants.*
 - Are you on track based on your original plan?
 - What do you see as your successes in the project so far?
 - What challenges have you encountered? How have you addressed them?
- **Personnel**

Have there been any changes in personnel that affect the project?
- **Organizational Changes**

Have there been any changes in the organization (independent of the particular project for which you received funding from the Foundation) that you would like to share with us?
- **Changes in the Field**

Have there been changes in the field that have influenced your plans for this project or the organization (e.g., new legislation passed; new regulations; steeper-than-expected budget cuts)?
- **Requests for Changes**

Would you like to make any changes to your plans? For example, you might wish to request a no-cost extension, to propose new activities, and/or to recommend new goals.

2. Interim Financial

N/A for general support grants.

- The financial needs to be in the same format/based on the budget document submitted in the proposal.
- Please include a financial accounting of funds spent to date, comparing the budget included in your original proposal with actual funds spent.
- Have you raised additional funds for the project? If so, how much, from whom, and for what?