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.

Please email your report to your program officer or program associate. If you have any questions email your program officer or program associate, 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** (in Word, preferred)
2. **Interim Financial** (in Excel, preferred) (N/A for general support grants.)

1. **Narrative Report**
   - **Project Activities and Goals**
     - Please briefly describe the main purpose(s) of your project and the time period that is covered by this report.
     - Are you on track based on your original plan? Compare your progress so far against the goals or activities that you included in your original proposal.
     - 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 has passed; new regulations in place; 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.)
   - 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 what sources, and for what purposes?