

The Roger Kresge Foundation

Uniform Grant Report Interim Report*

ALWAYS refer to the Grant Agreement and the report letter for reporting requirements PRIOR to submitting the UGR.

GRANTEE: _____

GRANT NUMBER: _____ **DATE:** _____

Specify the time-frame of the Interim Report (e.g. 6-month, annual, etc.) _____

TYPE OF SUPPORT GRANTED:

_____ **operating** _____ **capital** _____ **special project** _____ **program**

PROJECT/PROGRAM NAME (if applicable): _____

NAME & TITLE OF PERSON REPORTING: _____

TELEPHONE NUMBER: _____ **E -MAIL ADDRESS:** _____

FINANCES:

TOTAL BUDGETED INCOME FOR PROJECT FROM ALL SOURCES: _____

TOTAL INCOME PLEDGED OR PAID FROM ALL SOURCES TO DATE: _____
(Include any information about requests for funding which have been postponed, denied, or have had no response.)

TOTAL BUDGETED PROJECT EXPENSES: _____

ACTUAL EXPENSES INCURRED TO DATE ON THE ENTIRE PROJECT: _____

WILL THE BUDGET SUBMITTED WITH THE PROPOSAL REQUIRE REVISION? _____
(If so, please tell us how this is being addressed.)

INDICATE BUDGET BY CATEGORY AND ACTUAL EXPENSES BY CATEGORY TO DATE.

SCHEDULE:

PLANNED TIMELINE FOR PROJECT: FROM: _____ **to** _____

IS PROJECT PRESENTLY ON SCHEDULE? _____ (If not, please indicate reasons.)

***Grantee keeping Grantor informed of significant changes to the funded project in a timely manner is required, and receipt of future funding is dependent on such timely reporting.**

**** Please answer the questions on page 2 that apply to your specific grant.**

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Interim Report**

Please answer *only* the questions that are related to the type of funding that your organization has been awarded.

FOR PROGRAM, CAPACITY BUILDING AND SPECIAL PROJECT GRANTS:

1. Provide a brief overview of the primary accomplishments of your project to date, and the activities undertaken to carry it out.
2. What were the original goals and measurable objectives of your funded proposal?
3. Report on the specific outcomes of your proposals' original objectives to-date. What methods were used to measure your original objectives? (Use quantitative data when available)
4. What unanticipated problems and or changes have you encountered to-date in carrying out the project and how are you managing these problems?
5. Is your project on-schedule? If not, how are you revising the time-line of deliverables?

FOR CAPITAL GRANTS: (equipment, construction, capital campaign, etc.)

1. Update the status of fundraising and loans related to your project during the reporting period.
2. Describe any changes in costs of the project and how they affect plans going forward.
3. Describe any challenges faced and how those challenges were addressed.
4. Is your project on-schedule? If not, how are you revising the time-line?

FOR OPERATING SUPPORT:

1. Briefly restate the plans outlined in your original request for operating support.
2. Describe the impact of the granted operating support on the organization's long-term sustainability to-date.
3. What changes has your organization made to-date in the way it operates to ensure its long-term sustainability?
4. Has this grant for operating support been instrumental in attracting additional resources in the form of people, money, goods, services, or publicity? If so, please describe.
5. List other funding sources and amounts received (over \$1,000) during this period that have contributed to the long-term sustainability of your organization.

OPTIONAL:

You may include press releases, recent newspaper/magazine articles, photographs, brochures, or other materials highlighting the grant-funded activities and accomplishments.