

**HOFFBERGER FOUNDATION
REPORTING REQUIREMENTS**

Hoffberger Foundation grantees must submit both interim and final narrative and financial reports. We want to know about your successes and challenges, and how you may be thinking about adjusting your approach or project implementation in the future. All outcomes provide useful information as we strive to learn from the work of our grantees and understand the impact of the programs that we fund. We hope these reports will also be a useful tool for you as you assess the effects of your efforts.

Appropriate reports must be submitted and approved before new proposals will be reviewed. If you are a current grantee, you are still eligible to submit a new proposal the following grant cycle even though your current grant period is not yet complete. Interim reports must be submitted by the deadline below and approved by staff before the new proposal will be reviewed.

If you received a grant award in the past and do not currently have an active grant, report requirements must be met before a new proposal will be reviewed.

If you have any questions about the reporting process or requirements, do not hesitate to contact us. Outside of the regular deadlines, we welcome updates. And if you have thoughts about how the Foundation might be more helpful to its grantees, we encourage you to share them with us in writing.

DEADLINES

Interim Report: January 15*
Final Report: September 15*

** If the deadline falls on a weekend or holiday, the report is due the next business day.*

An automated notification about the report deadline will be emailed to the primary contact associated with your application three weeks before it is due. However, you are responsible for all deadlines regardless of receipt of this notification. If you wish to change the contact person associated with your application, please contact us.

HOW TO SUBMIT A REPORT

Log in to your application at <https://www.grantinterface.com/hoffberger/Common/LogOn.aspx>. Look for the reports assigned to you under follow up forms. Click "edit" to complete the report.

TIPS ON THE FINANCIAL REPORT

The **financial report** should compare the original budget (income and expense) that was presented as part of your application to the actual program expenditures and revenue. You should provide the complete program budget with all line items, including but not limited to details on how the Foundation grant was allocated. Include an annotation to the financial report to describe any items which are not self-explanatory as well as significant variances. *(See examples on next page.)*

Example 1. Interim Financial Report

Include, when necessary, an additional column describing how and when the remaining grant funds will be expended.

Organization X				
Project Name				
Report Period: 00/00/0000 – 00/00/0000				
Line Item	Original Program Budget	Budget To Date		
INCOME				
XYZ Foundation	\$25,000	\$20,000		
Hoffberger Foundation	25,000	20,000		
Government Grant	40,000	40,000		
General Operating Funds	9,000	9,000		
Total Income	\$99,000	\$89,000		
EXPENSES				
			<i>Hoffberger Foundation Grant Allocation</i>	<i>Remaining Hoffberger Foundation Grant to be expended by xx/xx/xx</i>
Salaries	\$76,000	\$70,000	\$10,000	\$5,000
Supplies	16,000	13,000	5,000	
Transportation	7,000	6,000	0	
Total Expenses	\$99,000	\$89,000	\$20,000	\$5,000

Example 2. Final Financial Report

Organization X			
Project Name			
Report Period: 00/00/0000 – 00/00/0000			
Line Item	Original Program Budget	Actual Program Budget	
INCOME			
XYZ Foundation	\$25,000	\$20,000	
Hoffberger Foundation	25,000	20,000	
Government Grant	40,000	40,000	
General Operating Funds	9,000	9,000	
Total Income	\$99,000	\$89,000	
EXPENSES			
			<i>Hoffberger Foundation Grant Allocation</i>
Salaries	\$76,000	\$70,000	\$15,000
Supplies	16,000	13,000	5,000
Transportation	7,000	6,000	0
Total Expenses	\$99,000	\$89,000	\$20,000

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GRANT AGREEMENT REMINDER

Per the terms of your grant agreement, you have agreed to the following:

- No significant changes to the program or to the submitted budget will be made without the Foundation's prior written approval.
- The Foundation's Executive Director will be notified via email as soon as possible about changes in program staff and transitions in senior management at the organization.
- Any grant funds not expended for the purposes of the grant within the stated grant period will be returned to the Foundation.
- Requests for an extension to the grant period must be made via email to the Foundation's Executive Director.