Sample Report Guide

The Colorado Health Foundation has created a sample progress/final report and guide for grantees. The sample report was created to help give grantees an idea of the types of information and the appropriate level of detail needed through example responses. The Foundation wants to learn about the status of the intermediate milestones and measurable results (if applicable) outlined in your grant agreement, the organization's successes and challenges, and the status of the funds awarded through the grant. **We have included example responses where appropriate**. Here are a few items to keep in mind when completing a progress report or final report:

1. Use your Signed Grant Agreement as a reference when filling out your report:
   - Keep in mind any amendments that have been approved during the timeframe of the report
   - Expected Intermediate Milestones can generally be found on the first or second page of grant agreement and are listed within the online report form for your project

2. Reporting Timeframe:
   - All Progress and Final Reports should report on work for the current period since your last report (unless otherwise noted)
   - For grants that have grant terms of 12 months or less, you will generally only have one Final Report to submit

3. If an Intermediate Milestone was not met at time of report, please be sure to explain how your organization plans to meet that milestone during next period or address if the milestone will no longer be met

4. Reports should be concise and include only relevant information (1-2 paragraphs per question)

5. **DO NOT** include client health information/data – results reported should be aggregated.

6. We encourage you to provide an honest assessment of how your organization and program are doing in your responses. We're here to learn from you and provide any support that we can!

7. We recommend writing the sections in a word-processing document and copying and pasting them into the appropriate sections of the online report form. Remember to save your work frequently.

* Not all reporting templates will look like this. Some reporting templates will be specific to your grant type (Example: Healthy Schools and Rapid Response) and will have added or less fields that what is listed here.

Grant Summary

In this section, please review the organizational and grant information displayed for accuracy. If information requires updating, please update the information in the "Update Organization Contact Information" section of the portal.

Milestones

In this section, a narrative response will be provided by the grantee on the status of the grant milestones.

- Example below of Milestones listed (per the grant agreement) and a narrative response example that specifically address the Milestones

> What are the intermediate milestones?
>
> - Recruit and hire program director in July 2018
>
> - Purchase curriculum and confirm site participation for September 2018
>
> - Program director and support staff will attend training in October 2018
>
> - Begin implementation of Making CO Healthy intervention in November 2018
>
> - Provide Making CO Health Intervention to 500 low-income Coloradans during year one of grant to increase the number of individuals who eat adequate amounts of fruit and vegetables daily.

Give an update on the intermediate milestones as specified in your organization's grant agreement, focusing on the milestones that relate to those in this reporting period.

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>
> • Recruit and hire program director in July 2018
>
> Milestone Met (Response Example): Hired program director, Holly Fake, in August 2018. Holly Fake has several years' experience implementing health interventions in low-income communities. The recruitment and hiring process took longer than anticipated; however, the program implementation plan is still on track for the first year of the grant.
>
> • Purchase curriculum and confirm site participation for September 2018
>
> Milestone Met (Response Example): Curriculum was purchased in August 2018. Three community sites confirmed participation in intervention and provided space to hold classes by September 2018. The community sites also provided in-kind childcare and healthy meals for families who attended classes.
>
> • Program director and support staff will attend training in October 2018
>
> Milestone Met (Response Example): Holly Fake and 3 support staff attended Making CO Healthy training in Denver in October 2018.
>
> • Begin implementation of Making CO Healthy intervention in November 2018
> Milestone Met (Response Example): Implementation of Making CO Healthy began on NOvember 10, 2018 as scheduled.
>
> • Provide Making CO Healthy intervention to 500 low-income Coloradans during year one of grant to increase the number of individuals who eat adequate amounts of fruit and vegetables daily.
>
> Milestone Met (Response Example): 576 low-income Coloradans successfully completed the Making CO Healthy curriculum. The in-kind meal and childcare helped to make the program successful at each of the community sites.
>
> Milestone Not Met (Response Example): 300 low-income Coloradans successfully completed the Making CO Healthy curriculum. Prior to program implementation one community site closed due to lack of funding. Also, the organization experienced staff turnover which resulted in losing two curriculum-trained employees. The program director is recruiting and interviewing applicants, as well as looking for a new community site.

Measurable Results

In this section, the grantee will provide an update on the measurable results as specified in the grant agreement (if applicable), focusing on those measurable results that relate to this reporting period. **Should the grant not track Measurable Results, this section will not be included on the report.*

- The agreed upon Measurable Results will be displayed. The *anticipated measurable results* for the year of the report will be listed for reference according to the grant agreement. Please report on the *actual measurable results (quantity) achieved during the current reporting period.*
    - o Example 1:

    Measurable Results (Progress Report)

    2. Increase number of children and adults who eat adequate amounts of fruits and vegetables daily

    Request MR 2 Year 1 Anticipated Quantity: 500

    MR 2 Year 1 Actual Quantity: 576

    - o Example 2:

    Request MR 2 Year 1 Anticipated Quantity: 500

    MR 2 Year 1 Actual Quantity: 300

    - o
- In the narrative fields, specifically address the method of tracking and any deviations.
    - o Example 1:

    Describe the method used to track and calculate these results.

    Response Example: Attendance data is tracked and stored in an excel database and is updated after each class by staff. A person is considered to have successfully completed the program if they have attended 90% of the classes (14 of the 16 classes). Only those who successfully completed the class are reported.

    Describe any deviations from the initially predicted results as specified in your grant agreement.

    Response Example: No deviations to report from the initially predicted results. However, the impact of the program exceeded what was anticipated by 76 participants. The program gained popularity within the communities due to word of mouth praises and referrals from participants. Also, in-kind meals and childcare helped to make the program successful at each of the sites.

    - o Example 2:

    Describe any deviations from the initially predicted results as specified in your grant agreement.

    Response Example: The closing of one of the community sites and staff turnover resulted in serving fewer participants than anticipated by 200. Due to the staffing and training needs, funds for the next grant year may need to be reallocated, which we will follow up with the Foundation. The program plans to extend hours and days that the program is available at the remaining two sites to help meet the projected numbers served as well as meet the community need.

Successes and Challenges

In this section, the grantee will provide information on the successes and challenges the organization has experienced related to the grant.

- Example:

Success and Challenges

Please describe the significant successes the organization experienced related to the grant:

Response Example: The Making CO Healthy program was well received by the community and partners. The three community sites were supportive by providing the classrooms, as well as healthy meals and childcare for participating families. Approximately 90% (270 out of the 300) of those who signed up for the program successfully completed the program and showed in their pre and post surveys statistically significant increases in knowledge about nutrition. At pretest nutrition knowledge was at 2.21 and at post-test 4.19, p<.01.

Those who participated in the focus groups provided useful feedback that will be used to help tailor the curriculum to specific community needs. Lastly, neighboring communities have requested to participate in the curriculum. The program director is working with these communities to help assess what resources are needed to implement the curriculum.

Please describe the significant challenges the organization experienced related to the grant.

Response Example: The organization faced a few challenges during the first implementation year of the Making CO Healthy program. The initial challenge the project experienced was the recruitment and hiring of a program director. However, the organization accomplished this milestone only one month later than anticipated. The greatest challenge faced was one of the community sites closing due to lack of funding and staff turnover at our organization, which resulted in our organization only being able to serve 300 individuals during this first year.

Please describe what the organization has learned based on the results, successes, and challenges.

Response Example: The need of the Making CO Healthy program has been confirmed by the community through the interest and great feedback received. The focus groups helped to gather valuable information about how participants perceived the program, as well as gauging particular needs. Many participants stated that they now understand the importance of nutrition and the type of impact it can have on their families. Participants in the community are interested in learning more about nutrition guidelines and how to incorporate those into everyday meals for their families.

The closing of the community center has reinforced the need in this low-income community. Community members do not have many places to gather. Our organization is working with partners to help figure out plans for a new site or to find funding to help restore the closed site. The staff turnover has also taken a toll on our program. Our organization has taken this challenge as an opportunity to

Please address all programmatic, evaluative, or organizational changes that may or will be made based on the lessons learned.

Response Example: As mentioned, program participants were much more interested in learning about nutrition guidelines and ways to incorporate those into their daily living. The information received from the focus groups has helped us to tailor and expand the nutrition portion of the curriculum.

The focus groups will continue to be implemented at the end of the curriculum to help gauge interests, perceptions and needs in the community. Also, the pre and post measure will continue to be used for each program implementation to help measure program effectiveness.

The challenges our organization experienced were used as an opportunity to reevaluate staff needs and community need. The organization has decided to only hire for one new staff member and will expand the hours/days that the program is available for community at the two available sites. The new staff member will need to be trained in the curriculum. Through the expanded program hours and new staff our organization is confident that we will be able to meet the projected people served as agreed upon in the grant agreement.

Additional Information

In this section, the grantee will provide any positive or negative impacts to the organization during the reporting period as well as any recommendations and feedback for the Colorado Health Foundation. This section is not required.

- Example

If applicable, please share anything else that happened during the grant period that impacted the organization positively.

Response Example: The organization has made great strides in building relationships and partnering with other organizations within the community. The community partnerships have been very positive for our staff and the community members we serve. Staff is better able to make referrals for participants to help get them better connected to other types of services they need. Also, one of our community partners has helped us with our Spanish translation needs of materials which has helped us better serve the community.

If applicable, please share anything else that happened during the grant period that impacted the organization negatively.

Response Example: Our organization would like the opportunity to have access to other grantees that are doing similar work to discuss lessons learned and share ideas.

Please share with us any recommendations you have for our grant making or reporting process.

None at this time.

Please report anything else you would like to share, as it relates to the progress and outcome of the grants.

Response Example: We have attached additional evaluation work that we are proud of and would like to share with you on the quality of our program and its continued successful outcomes. Also, our program was featured as part of our local newspaper's "Making a Difference" series, which helped our organization reach new donors and exceed our fundraising target.

Finance

In this section, the grantee will report on the organization's financial position and the use of grant funds.

  - Example:

Finance

Referring to your organizations financial statements for the year(s) in which the grant was used, please explain any significant changes in your financial position.

Response Example: See attached our balance sheet and income and expense statement for the year in which the grant was used. The income and expenses statement will show that our organization has had a net loss over the last year, due to the fact that we did not receive a federal grant we had original expected. We are currently seeking replacement funds from a variety of sources, including donors and a new signature event.

Please list your total project budget. (If you are receiving general operating funds from the Foundation, the total project budget should be the annual expense figure of your operating budget.)

$165,000

Please provide a brief summary of how Colorado Health Foundation grant funds were spent for this reporting period.

Response Example: To date half of the grant funds spent have been put towards salaries and benefits. We experienced a delay in hiring, which is why our expenditures are lower than expected. We did, however, hire an individual with notable experience and years in the field - as a result the starting salary amount was higher. The other half of grant funds went towards project costs in the form of materials, curriculum, instructor stipends, site rental and participant workbooks. This training allows us to participate in a"train the trainer" model and ensure long-term sustainability of our program implementation plans.

Considering all Colorado Health Foundation funds received to date for this grant, what amount of funds remain unspent at this time?

$21,217

Percent of unspent funds (this is the percent of unspent funds as compared to the funds received from The Colorado Health Foundation to date.)

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If funds remain unspent, please briefly describe why and your specific timeframe for fully expending funds.

Response Example: We are underspent at he time due to a delay in hiring, which took two months longer than anticipated. Now that we are fully staffed, and because we hired our coordinator at a higher salary than anticipated, we expect to spend these remaining funds within two months.

Documents

In this section, the grantee will attach financial statements and the actual expenditure report. Additionally, should the grantee wish to provide additional documents (ex: amendment request, evaluation reports, pictures, etc…) they may do so here.

- The required Attachments are:
    - o Income and Expense Statement - most recent available statement that captures the organization's income and expenses
    - o Balance Sheet - most recent available statement that captures the organization's assets and liabilities
- Uploading instructions and Sample Document View:

Documents

The following documentation is required:

- Organization's most recent Income and Expense Statement
- Organization's most recent Balance Sheet

Uploading Instructions:

- Click the "+" next to each document type
- Select "Add Files," choose the document from your computer and select "Open"
- Click "Start Upload"
- Once uploaded, close the document window

Should there be any additional documents relevant to your report that you would like to share, please do so here by following these instructions:

- Click the "+" next to Documents
- Select "Add Files," choose the document from your computer and select "Open"
- From the drop-down select "Additional Attachment"
- Click "Start Upload"
- Once uploaded, close the document window

Income-Expense Statement - Progress Report ⊕

Balance Sheet - Progress Report ⊕

Documents ⊕