

LONG BEACH AIDS FOUNDATION

REPORTING REQUIREMENTS AND INSTRUCTIONS

Long Beach AIDS Foundation requires periodic reports of its grantees to ascertain the progress of supported projects and the results of its funding. Progress reports are due **every six (6) months** beginning from the date of the grant award and continuing through the entire grant term. A final report is due when all funds have been expended and the project, as proposed in the application, has been completed or prior to the upcoming grant cycle application due date, whichever occurs first.

Progress reports are an opportunity for you to document your achievements, challenges, and lessons learned. The Foundation recognizes that some grants, despite being well conceived and executed, will not achieve the desired results. Information about approaches that have not succeeded is also important and valuable to the Foundation. You may access the report form on the Long Beach AIDS Foundation home page at www.lbaidfoundation.org.

Below is an itemization of the information that should be included with each report. In addition, **be sure to note:**

- **your progress in meeting any conditions of the grant.**
- **If a payment installment is scheduled with a particular report.**

INTERIM REPORTS

- DESCRIPTION OF PROJECT
A brief description of the project for which the grant was made, including original project goals and objectives, as stated in your application.
- PROJECT ACCOMPLISHMENT(S)
Describe the progress you have made toward your original goals and objectives, including an assessment of the project's impact on those served, and the benefits derived from the grant by your agency. Include a comparison of actual versus original project goals. If the grant was awarded for construction, where does the project currently stand in relation to the construction timeline and budget?
- PROBLEMS ENCOUNTERED
List any problems, difficulties or challenges encountered and their solutions (planned or implemented), and lessons learned.
- STATUS OF MEETING GRANT CONDITIONS
If you were awarded a grant that has specific conditions (see Schedule B of the grant agreement), indicate whether you expect to meet all of the conditions of your grant by the date originally specified in the grant agreement. With each report, please let us know your progress and challenges. If you are encountering delays or challenges in fundraising, the Foundation would prefer to be informed well in advance of the scheduled payment date about the need for an extension or any other material changes in the project's implementation. If you anticipate not meeting a stated condition(s) in the time period originally projected:
 - 1) Explain the circumstances leading to this change, referring to which of the conditions you are describing
 - 2) State the new date by which you expect to meet the conditions

Matching grants require a list of names of grantmakers and the amounts and dates of their gifts to validate that all required additional commitments from other sources (in cash and valid pledges) have been secured.

- FUTURE PLANS

When appropriate, describe how the project will be sustained. If the project will continue past the grant term, how are you progressing in obtaining other sources of support?

ACCOUNTING SUMMARY

With every report, please include a line item accounting that lists the project expenses based on the budget as presented to the Foundation in the original grant application. Unless your organization has not yet received a grant payment, **please indicate the amount of Long Beach AIDS funds spent-to-date**. You may use your own financial report format that, at a minimum, provides the requested information.

FINAL REPORT (same form)

The final report should include the same information outlined above with one significant difference. This report should summarize your experience over the course of the **entire grant period**. The grant will be closed once all the Long Beach AIDS funds have been spent, and the project as proposed in the application has been completed.

MODIFICATIONS

In the event your organization wishes to make any changes that will materially alter the scope, timeline or nature of the project as originally proposed and for which the grant was awarded, **you must first submit a written request** for modification of the grant. Written approval must be obtained from the Foundation prior to the implementation of any changes or the grant may be rescinded. We also ask that you inform the Foundation of organizational changes, including changes in address, phone number, or key personnel.

Please do not send any publications and/or reports in lieu of this form. Please mail reports to:

Long Beach AIDS Foundation
c/o Beneficiary Grant Chairman
2630 E 4th Street
Long Beach, CA 90814-1225

PROGRESS REPORT TO LONG BEACH AIDS FOUNDATION

DATE: _____

REPORT DUE ON: _____

FROM: _____

FILE NUMBER: _____

NAME AND TITLE OF PERSON COMPLETING PROGRESS REPORT

TELEPHONE NUMBER AND E-MAIL ADDRESS

FOR SIX MONTH PERIOD _____ TO _____

FINAL REPORT _____ YES _____ NO

GRANT AMOUNT: \$ _____

DESCRIPTION OF PROJECT: (Briefly outline your original goals & objectives, as stated in your proposal)

PROJECT ACCOMPLISHMENT(S): (Describe the progress you have made toward your original goals and objectives including an assessment of the project's impact on those served and the benefits derived from the grant by your agency.)

PROGRESS REPORT TO LONG BEACH AIDS FOUNDATION

PROBLEMS ENCOUNTERED: (List any problems, difficulties or challenges encountered, and their solutions.)

**COMPLETE THIS SECTION ONLY IF YOU HAVE A CONDITIONAL GRANT
STATUS OF MEETING GRANT CONDITIONS:**

PROGRESS REPORT TO LONG BEACH AIDS FOUNDATION

FUTURE PLANS: (If appropriate, describe how the project will be sustained.)

ACCOUNTING SUMMARY

A line item accounting report should indicate the expenses related to the project, and it should be based on the project budget as presented in the original grant application submitted to the Foundation. Unless your organization has not yet received a grant payment, please indicate the amount of Long Beach AIDS funds spent-to-date. You may use your own financial report format that at a minimum provides the information requested. Significant variances should be explained.
