

MAY AND STANLEY SMITH TRUST

Guidelines for Grant Reporting for Tuition Assistance Grants

The May and Stanley Smith Trust requires a report from each grantee which confirms that the funds granted were used for the intended purpose. Reports should be prepared and signed by the individual who requested the grant or the Executive Director. The report must **also** be signed by another senior level staff member; a member of the Board of Directors; **OR** the organization's certified public accountant. **A total of two signatures must be included on the report.**

Reports should be submitted no later than the date specified in the grant transmittal letter. If the term of a funded project extends beyond this date, the grantee should submit a brief update to the Trust with a request for an extension of the grant period. Should the extension be approved, a full report will be due at the conclusion of the revised grant period.

Grant reports are narrative and financial summaries – there is no required format or form.

Narrative Report

Two to six pages of narrative should be sufficient for most tuition assistance grants.

Examples of topics to cover in the narrative report include:

- The amount of the grant and date awarded.
- **For the tuition assistance program, the total amount of tuition assistance/scholarships awarded and the total number of students assisted, as well as those assisted by the grant from the May and Stanley Smith Trust.**
- The outcomes and results achieved related to the major goals and objectives of the grant as stated in the proposal.
- The demographics served by the project.
- How the May and Stanley Smith Trust grant helped advance the tuition assistance program.
- How success of this project is measured.
- Any problems encountered and/or unexpected outcomes during the grant period.
- Plans for continuing tuition assistance.
- Any modifications to the tuition assistance program based on what was learned during the grant period.
- List other sources of support secured for tuition assistance. For each source, please include the funder's name and grant amount.
- Any noteworthy organizational changes (e.g., changes in leadership or staff, office location, organization name, tax status).

Financial Report

- A financial statement listing the income and expenses of the **full** tuition assistance program – not just the Trust’s portion – during the grant period.

Please do not include ancillary materials such as video tapes, electronic media, or publications. ***Reports should not be bound or placed in folders or binders of any kind.***

Please mail only **one copy** of your report. Faxed and electronic reports are not accepted. It is generally not necessary to send a report via messenger or overnight carrier service.

You will receive notification confirming that your report has been received and approved, or additional information may be requested.