

MAY AND STANLEY SMITH TRUST

Guidelines for Grant Reporting

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

Depending on the size of the grant and the complexity of the project, **two to six pages of narrative should be sufficient** for most grants. Topics to be covered in the narrative report include:

Grants for General Operating Support:

- The amount of the grant and date awarded.
- The outcomes and results achieved related to the major goals and objectives of the grant as stated in the proposal.
- The demographics and numbers served by the organization.
- A narrative report detailing highlights of the organization's activities during the grant period.
- Any problems encountered and/or unexpected outcomes during the grant period.
- List other major sources of support secured for the organization during the grant period. 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).

Grants for Specific Projects or Programs:

- The amount of the grant and date awarded.
- The outcomes and results achieved related to the major goals and objectives of the grant as stated in the proposal.
- The demographics and numbers served by the project/program.
- How the May and Stanley Smith Trust grant helped advance the project/program.

- Any problems encountered and/or unexpected outcomes during the grant period.
- Plans for continuing the project/program.
- Any modifications to the project/program based on what was learned during the grant period.
- List of other sources of support secured for this project/program.
- Any noteworthy organizational changes (e.g., changes in leadership or staff, office location, organization name, tax status).

Financial Report

- If the grant was for a specific project or program, a financial statement listing the income and expenses of the **full** project – not just the Trust portion – during the grant period should be submitted.
- If the grant was for general operating support, the organization's financial statements that correspond to the grant period should be submitted.

Please do not include ancillary materials such as video tapes, electronic media, or publications unless the grant specifically funded the production or distribution of these items or their contents. ***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.