

# **Lavelle Fund for the Blind, Inc.**

## **Grantee Reporting Guidelines**

### **Introduction**

Grantee reports provide both the grantee and the Fund the opportunity to reflect on the funded project's accomplishments, challenges, and lessons learned.

The Fund requires annual reports on the progress of each Fund-supported project: interim reports for multi-year projects and final reports at the end of all projects. Double-spacing and 12-point font are preferred.

Interim reports should be submitted 11 months after the beginning of the grant period on which the report is focusing – a schedule that facilitates timely payment of the next year's grant installment, if applicable. (The grant period is here understood to start when the Fund's grant check for that year is dated. For example, if the grant check were dated January 15, the grant report would be due on December 15.)

Final reports should be submitted not later than two months after the grant's end date, with the end date being defined as occurring one or more years after the date of the first Fund grant check earmarked for the project.

In writing the reports, please use the attached reporting guidelines. We ask that you respond concisely, using the format that is most convenient for you (for example, conventional narrative, bullet format, or short responses to each question). In addition, if the contact person for the Fund-supported project or any of your organization's other contact information has changed, please include a cover letter stating the changes.

Subsequent payments of multi-year grants are contingent on the grantee having achieved satisfactory progress toward project goals in previous grant year(s). Both the Fund's staff and Board read the reports.

The Fund knows that writing complete, accurate, and thoughtful reports takes considerable time and effort, and we very much appreciate your cooperation.

**Lavelle Fund for the Blind, Inc.**  
**Guidelines for Interim and Final Grant Reports**

**Project Summary**

Please restate the project's goals and objectives, as stated in your proposal.

**Progress Toward Objectives**

*A. Implementation and Results*

1. For each objective listed above, summarize your accomplishments, including project outcomes and (if known) project impacts. Describe the nature and size of the population served – and how this population was affected. Please discuss progress made as defined by the self-assessment criteria and measures indicated in your proposal.

Note: “Outcome” is used here to mean the result(s) of the project, as observed and documented by the project staff. For example, two outcomes might be that: (1) 20 people complete a training program for vision para-professionals and (2) 16 of these 20 obtain vision rehabilitation jobs in schools and community-based agencies. The word “impact” is used here to mean a change in the target population that is directly attributable to the project (over and above any change(s) that would have been expected even without the project).

2. Based on your experience in implementing the project, were the expected project outcomes realistic? If not, why?
3. Have there been any unanticipated outcomes? What are they?
4. Were the planned strategies for each objective appropriate and effective?
5. What significant changes, if any, occurred in the project's staffing pattern (e.g., change in project leader)?
6. If you have requested or are requesting any changes in project objectives, activities, and/or budget, please describe the changes and explain why they are needed. (The Fund will then review and decide on the proposed changes.)

*B. Context*

1. As necessary, describe major factors (either within or outside your organization) that either helped or impeded you in achieving the project goals. Examples might include a change in agency leadership or a change in the economic or funding environment.

2. As necessary, please indicate what your organization has done to overcome any impediments.

*C. Project Financial Summary*

1. Provide an accounting of the expenditures on your Lavelle Fund grant over the past year. Please utilize the four-column format shown on the attached financial report form. The first column should contain the project's approved budget for the year, using the same categories as in your approved proposal budget. In the second column, please list the expenditures to date in those categories. In the third column, list projected expenditures for any remaining months of the project year. The fourth column should contain a total of columns three and four.
2. If there are any major discrepancies in planned vs. actual expenses, please explain.

**Project Director's Critical Analysis**

- A. What do you think are the most important outcomes, impacts and lessons learned from this project?
- B. As necessary, please comment on how these lessons influenced your organization's work.

**Other**

- A. Please attach to the report the following appendices:
  1. Any evaluation or assessment reports bearing on the project.
  2. Your most recent audited financial statement. If the audited statement is not available at the time of report submission, please note when the audit will be ready and submit it within 30 days after completion.
  3. For interim reports, an explanation of any material changes in cash flow or outstanding liabilities, either current or anticipated.
  4. Any press coverage and/or promotional or educational materials related to the project.
- B. In the case of final reports, please also indicate what structure and funding have been established for the continuation of this project and/or related program activities, if appropriate.