This reference is meant to help you prepare your Online Grant Report. Any questions about reporting should be directed to Colin Jones at cjones@collinsfoundation.org or 503-471-2225.

ORGANIZATION DETAILS

* Organization name as it appears on your IRS determination letter
* Organization DBA/Project Name *(optional)*
* Organization EIN
* Contact Person for the Grant: Name, Title, Email, Phone
* Date of Award
* Report Type: Interim/Final
* Were there any changes to your legal name, tax status, or organizational structure?
* Did you have a change in executive leadership, program leadership, or grant contact?

NARRATIVE

* If you have submitted a grant report to another foundation within the last 90 days covering roughly the same information for the same work, you may attach that here in lieu of completing these narrative questions. **[ATTACHMENT],** OR
* Describe your major goals for the funded project and your progress toward those goals.
* What challenges did you encounter? Did you make changes to your original plan? Were there significant (more than 10 percent) adjustments to your budget or funding plan?
* What did you learn over the course of the project?
* How have you advanced equity within your organization over the course of the project?
* Was the community you served, or the number of people you served, different from what you estimated in your application? Why?

PROJECT BUDGET

* If this grant was made for a specific project, including capital projects, attach a year-to-date report of ***actual*** revenues and expenditures for the funded project. **[ATTACHMENT]**

FOR INTERIM REPORTS ONLY

* What are your plans for the coming year for the project?
* If there have been changes to your budget or funding plan since your application, please attach a pro forma budget for the coming year. **[ATTACHMENT]**
* Most recent year-end statement of financial position (balance sheet) **[ATTACHMENT]**
* Most recent year-end statement of financial activities (profit & loss) **[ATTACHMENT]**
  + If your year-end financials are more than six months old, please attach year-to-date financials from within the last 60 days **[ATTACHMENT]**
  + If you had a surplus or deficit of more than 10 percent, or if your current liabilities exceed your current assets, please share any causes and your plans for addressing deficits/using a surplus.