

COVERYS COMMUNITY HEALTHCARE FOUNDATION

Reporting Guidelines

January 28, 2019

In order to track progress and address any challenges faced in grant execution, the Coverys Community Healthcare Foundation (“CCHF”) offers these Reporting Guidelines for your consideration when determining if your organization will submit a grant request and to outline reporting responsibilities upon grant approval. The guidelines are a way to provide guidance. They may be changed without notice or amended due to, but not limited to, the specifics of the grant approved and/or the organization receiving a grant. You will be responsible for complying with our reporting requirements as stated and/or as amended in the future.

Grantees shall provide CCHF Interim and Final Reports as set forth below. Grantees may, at their option, provide CCHF with additional reports or updates on the progress of the grant work (“Project”). CCHF reserves the right to suspend and require the return of funds for delinquent or unsatisfactory reporting.

All reports should be submitted via email to foundation@coverys.com. If you are uncertain about the timing of your organization’s reports, please contact CCHF staff via email to ascertain specific dates. We typically provide a reporting schedule with the approval letter for your convenience.

Reports need not follow a particular form, but must contain the following information:

Interim Reports

Grantee shall submit an Interim Report to CCHF to provide an update on the execution of the Project. An Interim Report shall be provided no less than every six (6) months from the date the grant is approved and funding provided, or from an agreed upon commencement date of the Project (“Commencement Date”). These written reports shall, at a minimum, include the following information and be limited to no more than five (5) pages, including the cover page.

- a. **Cover Page:** The cover page shall identify the Grantee, Grantee Contact and associated contact information, name of person responsible for preparing the report and contact information (if different than Grantee Contact) , name of Project, Commencement Date, reporting period, as well as the amount of grant funds approved and received from CCHF.
- b. **Narrative Summary of Progress:** The narrative shall be no more than three (3) paragraphs that will summarize progress on the Project during the reporting period.
- c. **Setbacks/Problems:** The Interim Report shall identify any material setbacks as to how the Project will be executed and reasons, actual or anticipated problems or delays in Project execution, impact to the Project, and actions or plans to resolve these.
- d. **Project Milestones:** The Interim Report shall identify the milestones achieved towards meeting the originally stated aims, goals or objectives of the Project in the reporting period and all milestones to be met in the future for Project completion. This section should be cumulative for all Interim Reports after the first such report.
- e. **Percentage of Project Completed:** The Interim Report shall estimate the percentage of the Project completed, based on the Project milestones achieved during the reporting period and any prior reporting periods, as well as future milestones.
- f. **Interim Budget Reconciliation:** The Interim Report shall briefly describe how the grant funds received have been used during the reporting period and for any prior reporting periods. Expenditures should be noted using the same expense categories set forth in the Project budget.

Final Report

Grantee shall submit a Final Report to CCHF that will detail the execution of the Project to conclusion ("Completion Date"). The Final Report shall be provided within sixty (60) days of concluding the Project. This written report shall, at a minimum, include the following information and be limited to no more than twelve (12) pages, including the cover page.

- a. **Cover Page:** The cover page shall identify the report as the Final Report and include the name of the Grantee, Grantee Contact and associated contact information, name of person responsible for preparing the report and contact information (if different than Grantee Contact), name of Project, Commencement Date, Completion Date, and grant funds received from CCHF.
- b. **Executive Summary of Project Execution:** This summary shall include a summary of progress made toward the achievement of the originally stated Project aims, goals or objectives and a list of significant results (positive or negative).
- c. **Project Outcomes:** Grantee shall provide a concise summary of the outcomes of the Project, written for the general public in clear and comprehensible language, without including any proprietary, confidential information or trade secrets.
- d. **Project Milestones:** Grantee shall identify the milestones achieved in all reporting periods and any unmet milestones. If any milestone was not achieved, Grantee shall indicate the reason and any impact it had on the Project.
- e. **Percentage of Project Completed:** Grantee shall indicate the percentage of the Project completed, referring to all Project milestones, both achieved and unmet and referring to any measures or outcomes described in the grant application materials.
- f. **Collaboration:** Grantee shall identify any individuals and organizations that were used as collaborators on the Project and the specifics of the collaborative efforts.
- g. **Communication of Project results:** Grantee shall provide a list of conferences, forums or similar meetings where Grantee has presented or has/will apply to present Project results. Similarly, please list any journals or other publications where the Project has been featured or mentioned, and where Grantee will submit the Project results for future publication.
- h. **Final Budget Reconciliation:** Grantee shall provide a detailed budget reconciliation identifying how the CCHF grant funds received were used from the Commencement Date to the Completion Date. Expenditures should be noted using the same expense categories set forth in the Project budget. In the event all funds provided by CCHF are not used in connection with the Project, Grantee will notify CCHF to discuss final disposition of the balance of the funds.
- i. **Sustainability:** Describe how the essential elements of the Project will be supported by your organization going forward.
- j. **Transferability/Scalability:** Describe how this Project might be adapted for use by other similar entities and be scaled to provide a broader impact, as applicable.
- k. **Photos:** While not required, we appreciate receiving photos depicting project work.