

The Ralph M. Parsons Foundation **Report Guidelines**

Introduction

Reports provide a meaningful opportunity for reflection and communication between The Ralph M. Parsons Foundation and your organization. Through your report, the Foundation learns about the opportunities and challenges facing your agency and the broader nonprofit community. We hope to celebrate your successes and learn with you when things do not go exactly as planned.

Deadlines

Report deadlines are outlined in your Acceptance of Grant. Generally, reports are due on the date stipulated or one year from receipt of grant payment, whichever is later. In the event that the report deadline falls on a weekend or a holiday, reports may be submitted on the following regular business day. If you have questions about your deadline, please call the Foundation at 213-362-7600 and ask to speak with grants management.

Report Outline

Please structure your report as follows (we request that you be succinct and clear):

I. Narrative (no more than three pages)

- A. Name, title, and contact information of person to whom questions about this report may be directed.
- B. Changes in address, phone numbers, or significant staff members.
- C. Grant purpose, amount, and date awarded.
- D. Summary of grant activities during the grant period, including progress made toward goals and specific details on outcomes and number of people served. **For capital grants only:** Status of project.
- E. Any setbacks or challenges and how you addressed them.
- F. Lessons learned based upon the results, successes, and challenges you encountered.

II. Financial Accounting

- A. Statement of Financial Position (balance sheet) and Statement of Activities (income and expense statement) for *your* fiscal year that most closely aligns with the grant period. If the fiscal year has not yet closed, you may submit year-to-date financial statements.
- B. **For capital or program grants only:** income and expenses for the project and how Foundation funds were used. Please explain any significant variances between budgeted amounts and actual expenditures for the total project.

III. Feedback (optional)

- A. Any information you would like to share about your experience as a grantee.
- B. The Foundation's grant application process is conducted through an online portal. In the future, would you prefer to submit your grant report through this online portal as well?

Submitting Your Report

Please email your report as a single PDF file to grantsadmin@rmpf.org. We will email you to acknowledge receipt of the report.

Should you have any questions about completing your report, please call the Foundation at 213-362-7600 and ask to speak with a program officer.