



Fred A. and Barbara M. Erb Family Foundation Reporting Requirements

We have attempted to develop a practical approach to program evaluation. While most programs likely will not require a formal, outside evaluation, we do expect a thoughtful process and written report. Program evaluation provides ongoing, systematic information that strengthens projects during their life cycle and provides outcome data to assess the extent of change. Evaluations should include both Process and Outcome components, meaning that they will document the development and operation of the program (Process) as well as measure the program's impact (Outcomes). The purposes of our Reporting Requirements are therefore: (1) Grant Monitoring – to assure that funds are being spent as planned, (2) Measurement – to help assess the impact of the grant (3) Organizational Learning - careful collection and use of data should help ongoing program development and refinement.

New grants must submit a Progress Report after 6 months and a Final Report 2 months after the conclusion of the grant. Renewal Grants and Multi-Year Grants instead submit annual Progress Reports, due 10 weeks before the Board reviews the grant, and a Final Report 2 months after the conclusion of the grant. *Final Reports should be cumulative, covering the entire Grant Term.* We will send you an email reminder approximately 4 weeks before your Report is due. The email will include a web-based link to submit your Report. We will only accept Reports submitted through that link. We also encourage regular, ongoing communication.

The Progress and Final Reports should answer the following questions:

- What **activities** have taken place/services have been provided and which of the **results or outcomes** identified in your proposal as flowing from those activities have occurred (recognizing that it may take a full year or longer before some of these are observable)? Please be sure to specify the number of people served, the units of service provided and/or any other relevant quantifiable data. Please cumulate your data for us where possible.
- What challenges or disappointments did you encounter?
- What changes, if any, have you made or do you anticipate making and why?
- What specific steps have you taken towards securing additional and ongoing funding for the project or organization, and what steps do you plan to take over the next year?
- List program expenditures and revenue to date, following the original budget submitted with your proposal, showing variances if any (remember, you must request prior approval from the Foundation for material changes to your program or budget). General operating support grantees should instead submit the organization's internal (unaudited) financial report for their fiscal year-to-date.
- Attach a copy of your most recent audited financial statement if we do not already have it. Also include links or references to publicity and other materials regarding the program that would be helpful in improving our understanding of the program and/or that include recognition of the Foundation.