

Local Grantmaking Reporting Guidelines¹

In your grant award letter, we indicated that you would be required to submit a report (or reports) on specifically designated due dates. Please email the following materials to local@packard.org with the subject: “Interim or Final Report for Grant 200#-#####.” It is important that you refer to the specific grant number.

In no more than three pages, please include a brief narrative of your organization’s most significant accomplishments achieved as a result of the Packard Foundation’s funding. Please note the ways in which the outcomes were or were not congruent with the objectives you described in your proposal. Alert us of any significant events that have brought about organizational changes or have had an impact on your program. Lastly, please note if the primary contact person for your organization has changed.

In addition to the narrative, we would like to review your organization's financial activity for the most recently completed fiscal year. Please attach:

- Statement of activities (also known as an income statement) for your most recently completed fiscal year,

AND

- Statement of financial position (also known as a balance sheet) for your most recently completed fiscal year,

*AND, if it is a **final** report,*

- Audited financial statements for the year(s) covered by the grant, if available.

If funds have not been expended during the grant period, please send a letter describing the circumstances and the date you believe you will complete spending the funds.

If you require further information or have any questions, please do not hesitate to contact the Local Grantmaking team at local@packard.org or (650) 917-7234.

¹ Please note: If you are a grantee in Pueblo, Colorado, please read the “**Pueblo Subprogram Reporting Guidelines**” which can be found in “How To Get Support” under the **Pueblo, Colorado** page.