

## FINAL REPORTING REQUIREMENTS FOR RRF GRANTEES

Grantees will submit their reports electronically via the Final Narrative and Financial Report form that is uploaded into the grantees' RRF Online Applications and Requirements accounts soon after grants are awarded. Grantees will receive an email notifying them when the report form has been uploaded into their account. In addition, they will receive instructions about how to access the form via an RRF Online Applications and Requirements Account.

The following provides guidance about preparation of the report.

The report is to be submitted by the due date specified on page four in the Grant Award Letter.

The report should be clear, concise, and well organized and should be double-spaced. Do not use gradient shading in charts, tables, or budget reports.

Final reports may be distributed to, or summarized for, a broader audience than the Foundation staff. Therefore, **grantees should not assume audience familiarity with the original proposal or other products**. There is no recommended length for final reports, but they should include the following:

1. Grantees will confirm that the cover sheet (shown in Tab 1 of the online report form) properly displays the following information:
  - Title of project
  - Sponsoring organization
  - Project start date
  - Project end date
2. Executive Summary: The Executive Summary should be three to five pages in length and should succinctly summarize the nature of the problem addressed, the final methodology undertaken, the most important findings/outcomes, and your sense of the project's value and its specific implications for:
  - Your organization
  - Your project's future directions, and
  - The field of gerontology (if applicable)
3. Grant Analysis Narrative
  - The names(s), address(es), phone number(s), e-mail(s) of Project Director(s) **and** the person completing the report, if different.
  - RRF Grant Award # (example: 2013-444)

- Identify any significant issues or problems during the grant period, evidence for them, how they affected progress toward objectives, and what corrective actions have been taken.
- Summarize significant project modifications, if any, for this final project period (e.g., to original objectives, planned strategies, timetable, evaluation design, budget, and personnel). Include resumes of any new personnel, if applicable.
- List and discuss any unanticipated results or products (items discussed in earlier report can be listed with a reference to the appropriate document).
- Discuss the most important substantive lesson(s) learned about the problem area you are addressing that extend knowledge in the field and/or will enhance your organization's future success.
- If applicable, describe any significant organizational changes that have occurred since the start of the grant period (e.g., changes in mission, management, partnerships, financial status, etc.).
- Describe the most important operational lessons(s) learned about how you implemented your project that others may benefit from knowing before implementing similar projects.
- List specific next steps your organization/project will take to build on the work completed to date.
- List specific, completed dissemination activities, including the nature of the audiences, materials disseminated to each, and estimated numbers of persons in each audience reached. List ALL products available to date (e.g., articles, papers for presentation, brochures, questionnaires or scales others might use, manuals, etc.) and include anything produced in the final project period as an attachment to this report.
- List specific additional dissemination activities planned for the coming months, if applicable.
- Describe all pending and current grants, if any, your organization/project has requested/received *that you can directly or indirectly attribute to the work done for/funding received from RRF*. List where the funding has/would come from and the amounts for each request/grant. Clarify if the funding is already in hand or pending. You may wish to put this information in the form of a table.
- List and discuss any new organizational connections, if any, you have made with advocacy, training, service, consumer, government or other groups as a result of this project, and how these have strengthened your capacity to extend this or similar work into the future. Include organization names, and describe your relationship with each.

#### 4. Financial Report

Include a financial report of expenditures for the entire project. It should include three components: the original approved budget, the amount actually spent, and the variance. Any major alterations in the budget should be explained.

The following sample report template is for illustrative purposes only and can be changed as needed. A grantee may use this format or any other that is appropriate for the project.

<b>Sample Financial Report Template</b>			
	<b>Funds Received from RRF</b>	<b>Actual Expenditure of RRF Funds</b>	<b>Variance</b>
<b>Personnel Expenses</b>			
Payroll	\$ 78,000	\$ 76,960	\$ 1,040
Benefits	\$ 7,020	\$ 7,110	\$ (90)
<b>Total Personnel Expenses</b>	<b>\$ 85,020</b>	<b>\$ 84,070</b>	<b>\$ 950</b>
<b>Direct Expenses</b>			
Postage	\$ 200	\$ 190	\$ 10
Printing	\$ 400	\$ 385	\$ 15
Licensing Fees	\$ 5,500	\$ 5,500	\$ -
Office Supplies	\$ 200	\$ 200	\$ -
Travel	\$ 811	\$ 1,150	\$ (339)
Program supplies	\$ 300	\$ 708	\$ (408)
<b>Total Direct Expenses</b>	<b>\$ 7,411</b>	<b>\$ 8,133</b>	<b>\$ (722)</b>
<b>Indirect Expenses</b>			
	\$ 9,243	\$ 9,243	\$ -
<b>Total Expenses</b>	<b>\$ 101,674</b>	<b>\$ 101,446</b>	<b>\$ 228</b>

If a grantee has questions about completion of the report, the RRF Program Officer assigned to the grant will be glad to answer the questions.

Alternatively, if the Program Officer is not available, contact RRF at 773-714-8080 or [info@rrf.org](mailto:info@rrf.org) and another staff member will help you.