

Jewish Foundation of Greater New Haven

Community Grants for the Jewish Elderly

POST-AWARD PROCEDURES Mazel Tov on your Grant Award!

I. Items to Note

1. These Procedures are necessary in order to allow the Foundation to track the progress of the grant recipients and provide the required fiscal and programmatic oversight.
2. The Grants Committee wants each grantee organization to succeed and we want to partner with each organization to help insure that happens.
3. All grantees are welcome to seek advice and/or provide feedback to the Grants Committee at any time.
4. If any problems arise and/or a Grantee organization encounters trouble meeting its goals they should notify the Grants Committee immediately.

II. Terms of Acceptance of Grant by Awardee

1. The Grants Committee will provide oversight for the duration of all grant projects which may include a visit to the grantee organization and/or the appointing of liaisons from the Grants Committee to the grantee organization.
2. Any changes to the Project Team (from that which was provided in the organization's grant application) must be reported to Lisa Stanger.
3. Semi-Annual Progress Reports and a Final Report (note, depending on timing, a Final Report may be combined with a semi-annual progress report) must be submitted to the Grants Committee. The Semi-Annual Progress Reports are due beginning 3 (three) months from the date of the award, and again, six months thereafter (unless a final report has been submitted). Once a Final Report is submitted, reports are no longer required. The Final Report is due 60 days following the completion of the grant.
4. An awardee must inform its membership and the community of its receipt of funding from the Community Grant Program.
5. All public relations material relating to the funded project must include reference to the Jewish Foundation of Greater New Haven.
6. In the case of equipment or capital improvements, there should be prominent and permanent notation or plaque that the purchase/project was made possible by a grant from the Jewish Foundation of Greater New Haven.

III. Distribution of Funds

1. No distribution of funds will be made until all requested paperwork is submitted.

2. Grant funds may only be used as described in the budget. Re-allocation of funds must be approved by the Grants Committee.
3. The Financial Director listed on the funded grant must sign off on all Progress Reports and the Final Report.
4. The Grants Committee will work with the grantee to determine the best way to provide documentation and payments.

COMMUNITY GRANTS SEMI-ANNUAL/FINAL REPORT

I. INSTRUCTIONS

- These guidelines are provided to help you articulate and evaluate your grant activities. The report allows us to track the progress of our grantee organizations and to provide the required fiscal and programmatic oversight.
- Reports should be prepared by the Project Director as specified on your grant application and signed off by your specified Financial Director.
- DISBURSEMENT OF FUNDS IS DEPENDENT ON COMPLETE REPORTING AND TIMELY SUBMISSION OF PROGRESS REPORTS.
- Semi-Annual Progress Reports and a Final Report (note, depending on timing, a Final Report may be combined with a semi-annual progress report) must be submitted to the Grants Committee. The Semi-Annual Progress Reports are due beginning 3 (three) months from the date of the award, and again, six months thereafter (unless a final report has been submitted). Once a Final Report is submitted, reports are no longer required. The Final Report is due 60 days following the completion of the grant. Note, if any of these days fall on a Federal or Jewish holiday or weekend, the report is due on the following business day that is not a holiday.
- If a section or question is not applicable to your grant, write “not applicable”. Please number the pages of your report.
- Please add any additional information that may be helpful to our understanding of your progress.

Name of Organization:

Individual Completing Form:

Position of Individual at Organization:

Phone Number:

Email:

Project or Program Name:

☐ Semi-Annual Report

☐ Final Report

Date_____

II. GRANT FINANCIAL SUMMARY

| | |
|---|----|
| Dollars requested | \$ |
| Dollars awarded | \$ |
| Dollars raised | \$ |
| Dollars raised that have been collected | \$ |
| Dollars remaining to be raised | \$ |
| Dollars actually spent | \$ |

III. PROJECT INFORMATION

1. Briefly list the original objectives of your proposal.
2. In what manner have you informed your membership and the community of your Grant Award?
3. Is your Project Team the same as listed in your grant application? If not, please indicate any changes and provide information concerning any new team member's role on the project, position at your organization, skills brought to the position, and why the change was made.

4. Is your vendor(s) the same as specified in your grant application? If not, please discuss the change.
5. Briefly describe your organization's activities during this reporting period to raise matching funds. If you have not yet raised the full match, briefly discuss how you will raise the funds and/or any issues that have arisen.
6. Briefly describe the major activities your organization conducted during this reporting period to meet your project objectives. Please be specific.
7. Is the project/program on schedule? If not, why, and what effect will this have on the project?

8. Have your project costs changed from that provided in your application? If so, please discuss.

9. Please detail any additional difficulties or unexpected obstacles not described above that you have encountered. How did you address/overcome them?

Questions 10-14 for Final Reports ONLY.
Semi-annual Reports continue at question 15.

10. Were your original objectives realized? (yes/no)

a. If objectives were not realized, discuss why.

b. How were the objectives assessed and measured? (attach copy of assessment/evaluation/survey)

11. What are the most important outcomes/results from the project?

12. Were any unanticipated outcomes (good, bad, or neutral) or challenges encountered with the project?

13. What are the most important “lessons learned” from the project?

14. What are your organization’s future plans for the project/program? How will it be funded?

PUBLIC RELATIONS

15. Please attach press or news items, brochures, letters of support, photographs, etc. concerning the project. If possible, provide a “human interest story” that illustrates the success of the project.

ADDITIONAL FUNDING

16. Have you received any other funding for this project/program (other than that which was listed in your grant application)? If yes, please list sources and amounts (note, it is not necessary to provide donor names).

BUDGET

17. Please attach an updated budget including sources and uses of funds.
18. Provide a detailed list of all expenses incurred during the duration of this project which have been paid with the Foundation grant.

| Item | Budgeted | Actual |
|---------------------------|-----------------|---------------|
| | \$ | \$ |
| | \$ | \$ |
| | \$ | \$ |
| | \$ | \$ |
| | \$ | \$ |
| | \$ | \$ |
| | \$ | \$ |
| | \$ | \$ |
| | \$ | \$ |
| | \$ | \$ |
| | \$ | \$ |
| | \$ | \$ |
| | \$ | \$ |
| | \$ | \$ |
| | \$ | \$ |
| | \$ | \$ |
| | \$ | \$ |
| Total | \$ | \$ |
| Unexpended Balance | \$ | \$ |

OTHER INFORMATION

19. Any feedback regarding the grant application process would be greatly appreciated. Please share your thoughts below. Thank you!

REPORT AUTHORIZATION

Project Director Name (please print)

Date

Project Director Signature

Financial Director Name (please print)

Date

Financial Director Signature