

UniHealth Foundation Reporting Guidelines

1. PROGRAM NARRATIVE

- Provide a summary of the progress made in the year being reported, including progress towards achieving goals, objectives, and outcomes.
 - Multi-year grant final reports should also include a summary of the project/grant overall.
- Also, briefly address the following:
 - (1) problems encountered and how they were resolved,
 - (2) any changes made during the course of the project,
 - (3) whether expected project outcomes were realistic,
 - (4) unanticipated outcomes,
 - (5) lessons learned (final report only), and,
 - (6) whether and how project will be sustained in the future (final report only).

2. PROGRAM COMPONENT – OBJECTIVES CHART

Provide a completed program chart, delineating progress made for every measurable objective consistent with the evaluation described in the grant proposal (see example below).

| Measurable Objectives [What] | Key Activities [How] | Evaluation Indicators/Outcomes [How you will measure] | Implementation Timeline | Progress |
|--|--|---|-------------------------|----------|
| Increase access to dental care for 200 school children per month | Dental screenings at school sites by appointment | <ul style="list-style-type: none"> ▪ # encounters ▪ # referrals for treatment | Monthly Months 1-6 | |
| Provide prenatal care for 300 women | Outreach, enrollment in MediCal, referral to prenatal care for underserved women | <ul style="list-style-type: none"> ▪ # of women served ▪ participation rates in prenatal care ▪ # and % of low birth weight babies | 12-months | |

3. FINANCIAL COMPONENT

Show the use of the Grant proceeds, with the data available at the time of reporting, detailing all expenditures made, consistent with the approved budget, in the following format in Microsoft Excel (see example below).

| Description | Original Grant Funds Approved | [Approved Change, if applicable] | Actual Grant Funds Expended to date | Balance | Comment |
|------------------|-------------------------------|----------------------------------|-------------------------------------|--------------|------------------------------|
| Project Manager | 20,000 | 23,000 | 20,000 | 3,000 | Reflects 11 months of salary |
| Medical Supplies | 5,000 | 0 | 2,500 | 2,500 | |
| Total | 25,000 | 23,000 | 22,500 | 5,500 | |

Progress Reports: If a balance is reported, please submit a budget modification request for subsequent year(s) that shows the allocation of carry-over funds*.

Data/progress at the time of reporting may be submitted, except in the case of final reports when the grant is completed.

Final Reports: For multi-year grant Final Reports, **provide final year and cumulative program charts and financial reports.** If a balance is reported and an extension is required, please submit the request in writing along with a *proposed budget for the use of unexpended funds**.

Grantees are required to submit **NON-PDF** electronic versions of the narrative, chart and financial portions of their reports to UniHealth Foundation (articles, supporting materials, etc., pdfs are acceptable). Grantees may:

Mail both printed materials and electronic copy to the attention of the Grants Manager, **OR**
E-mail reports directly to: cchung@unihealthfoundation.org