

Interim Report Questions



Interim reports are required for all grants over \$50,000 and other selected projects. For organizations awarded a multi-year grant, an interim report is required prior to receiving a second or third payment.

Please submit your interim grant report through the [online portal](#) and refer to your grant agreement letter for details about your reporting schedule.

Grant Funds

Please provide a budget narrative on revenues and expenses to date. Is your budgeting on track for the grant period or will you need to cut spending or increase revenue to stay on track? Do you anticipate any obstacles utilizing the grant funds in the manner outlined in the original application? How have you been able to create or sustain a base of support for this project?

Outcomes

Describe the progress made towards meeting the goals and objectives outlined in your original application. What are your success indicators that help demonstrate this project is meeting the proposed objectives? What evidence can you provide that demonstrates the project is on track to be completed by the end of the grant period?

Impact

What evidence can be shown that this project is achieving its intended impact? What benefits or improvements has this grant had on your constituency and/or the community thus far?

Impact Metrics

Please provide an update on progress made to achieve the desired metrics. Do you still believe those metrics and targets remain valid? Are there any metrics or targets you would change? If there are changes, please describe below and our foundation will contact you to discuss further.

Challenges

Have any internal or external challenges arisen in connection with this project? If so, how did you address those challenges? Were the challenges mitigated or resolved?

Learnings

Based on your original assumptions, what are your learnings thus far? Based on those learnings, will you do anything differently? If a formal evaluation is available, please upload document.

Additional Information

Are there additional insights, other changes or pertinent information that you would like to share with the Walters Family Foundation?

Required Documents

- Project Budget vs Actual: [Use the template provided.](#)
- Proposed new budget (if applicable): for the next year complete and upload [the Project Budget Form provided.](#)
- Current year organizational budget
- Project photographs
- Other supporting documents (i.e. evaluation, reports, press coverage, videos, etc.)

How can we help?

If you would like any assistance, please contact Libby Levy, Director, Walters Family Foundation, by phone at (248) 205.1390 or e-mail at libby@waltersffmi.org

Project Budget vs Actual Form



Organization Name: _____ Date: _____

Project Name: _____ Period of Reporting: _____ to _____

Instructions

Please complete and upload an itemized budget using [this form](#). Compare the original budget submitted with the application to the actual budget associated with the project's most recent grant period. For expenses, show how the Walters Family Foundation funds were allocated. For capital projects, please attach the detailed expenses as well.

Revenue

REVENUE SOURCES	ITEMIZED DETAILS	ORIGINAL BUDGET	ACTUAL REVENUE RECEIVED	BALANCE
Walters Family Foundation Grant				
Government Grants				
Foundation Grants				
Corporate Grants				
Individual Contributions				
Earned Income				
Membership Income				
Other (Itemize)				
Total				

Notes

Expenses

PROJECT EXPENSES	ITEMIZED DETAILS	ORIGINAL BUDGET	ACTUAL EXPENSES	WALTERS FAMILY FOUNDATION GRANT
Salaries (Itemize and specify FTEs)				
Payroll Taxes				
Fringe Benefits				
Capital Costs (Itemize)				
Consultants/Contracted Services (Itemize)				
Professional Services (legal, accounting, etc.)				
Training				
Travel				
Equipment & Supplies				
Printing & Copying				
Postage & Delivery				
Marketing				
Evaluation				
Rent				
Other (Itemize)				
Total				

Notes