

RESOURCES LEGACY FUND FOUNDATION
California Coastal and Marine Initiative
Grant Program
In collaboration with the David and Lucile Packard Foundation

GRANT REPORTING GUIDELINES

Reports are useful tools that give you an opportunity to convey information that best captures your work, provide Resources Legacy Fund Foundation (RLFF) with information that will help explain your work to various internal and external audiences, enable RLFF to evaluate its grantmaking, and an opportunity to provide feedback to grantees regarding their project. These reports should also help you collect information useful for management of your project.

All correspondence with RLFF should include the name of the grantee, grant number, and grant name. In your report, please also include the grant period, report type (interim, final, or other), and reporting period. Interim Reports should reflect the timeframe for reporting that is required by the Grant Agreement (e.g., six months, twelve months, etc.). Final Reports should reflect the entire grant period.

Grant reports should include the following items listed below. These elements are described in greater detail in the following pages.

1. Narrative: Please limit the narrative to no more than five (5) pages in length (standard 12-point font, see instructions on page 2).
2. Project monitoring table (see Attachment A on pages 3-4 for format and sample)
3. Financial report (see Attachment B on page 5 for format)
4. Other items, including:
 - Digital photographs of your project (if applicable)
 - Copies of all printed press coverage of, or references to, your project
 - Any other work products resulting from, or leveraged by, the grant funding

Please submit full and complete reports by the dates noted in your Grant Agreement. RLFF will provide substantive feedback to grantees within eight weeks of receipt of the final report. Failure to provide timely and complete reports may result in disqualification for future grants from RLFF or the Resources Legacy Fund.

Submit one (1) electronic copy the following email address:
marine@resourceslegacyfund.org

Resources Legacy Fund Foundation
Attn: California Coastal and Marine Initiative
555 Capitol Mall, Suite 675
Sacramento, CA 95814
Telephone: (916) 442-5057
Fax: (916) 325-7541
Website: www.resourceslegacyfund.org

Narrative

1. Have you made any changes to your expected outcomes, results, and activities? (Please insert and refer to the outcomes framework included with your Grant Agreement).

If you received written permission from RLFF to update your original outcomes framework, you may insert the updated version here. If you are proposing changes in the framework as a result of information presented in this report, please include both the original and the proposed revised framework.

2. To what extent are you making progress toward (interim reports) or have you achieved (final reports) your project outcomes?

Interim reports: Based on your outcomes framework mentioned above, please provide an update on **progress achieved toward your specific project outcomes**. For each outcome, provide an overview of activities undertaken during the reporting period, short-term results achieved (if applicable) and an explanation of how these results contribute to fulfilling project outcome(s).

Final reports: Please provide data showing how the **baseline status** (described in the needs assessment in the original proposal) **has been changed through the achievement of your project outcome(s)**. If the actual outcome was not as expected, or proved difficult to monitor, analyze your original outcomes framework and discuss challenges to achieving your outcomes within the context of your framework. For example, were some of the assumptions underlying your strategies and activities incorrect, or do they need to be adjusted? Were there external factors that needed to be taken into greater consideration? Did you identify indicators to measure progress that were difficult to track?

Also, for final reports, please describe key **lessons learned** during the reporting period, both in terms of successes as well as challenges. Describe how you will incorporate these lessons learned into your future work. If applicable, briefly describe the next phase of the effort.

Project Monitoring

Please use the Project Monitoring Table (Attachment A) to summarize information on the specific indicators included in your original proposal to note progress towards achieving project outcomes.

Financial Report

Please provide a financial report using the budget template submitted with the original proposal (see Attachment B). Please list the original project budget along with an accounting of grant funds spent to date. If there are major deviations from the original project budget, please attach a narrative justifying these deviations. Describe the amount and sources of additional funds and in-kind services. If you have unspent funds and have finished the work that was proposed in the grant, you must return the unspent funds to RLFF or submit a request to use those funds for other charitable purposes.

ATTACHMENT A

Project Monitoring Table

Organization: _____

Project Name: _____

Grant #: _____

Grant Period Covered by Report: _____

Project Outcome (as described in your original proposal and outcomes framework sect. 2.d.i)	Indicators (from proposal and outcomes framework sect. 2.d.iv)	Baseline Status (from proposal sect. 2.b)	Midterm Status (interim report) or End of Project Status (final report) of Indicators
1.	1.		
2.	2.		
3.	3.		

Sample Project Monitoring Table (interim report)

Project Outcome (proposal and outcomes framework section 2.d.ii)	Indicators (proposal and outcomes framework section 2.d.iv)	Baseline Status Data (proposal sect. 2.b)	Midterm Status (interim report) or End of Project Status (final report) of Indicators (please specify)
<ul style="list-style-type: none"> Restoration plan for *** wetlands in place and operational, with support from local community and key local, county, and state decision-makers 	<ul style="list-style-type: none"> Presence/absence of restoration plan Levels of awareness and support within local community for plan (measured through polling) # and position/rank of local, county, and state officials supportive of plan Status of restoration activities 	<ul style="list-style-type: none"> No restoration plan Awareness or support restricted to conservation community, low polling numbers elsewhere (see attached baseline poll) One city council rep and one member of the board of supervisors supportive of concept, no engagement on part of state officials and legislators No restoration activities taking place 	<p>(Midterm) Draft restoration plan currently being circulated for comment</p> <p>Broader engagement on part of local community (see attached summary of public testimony and letters to the editors offered by community citizens. Final poll will be conducted towards end of project)</p> <p>City council unanimously passes supportive resolution (see attached); letter of support provided by local assembly person (see attached).</p> <p>No restoration activities taking place (waiting approval of plan/permits)</p>
<ul style="list-style-type: none"> Long-term funding secured for restoration 	<ul style="list-style-type: none"> Amount of funds currently available or committed Number of prospective future sources identified; potential annual flows from these sources 	<ul style="list-style-type: none"> *** grant from Coastal Conservancy for plan No funding strategy in place 	<ul style="list-style-type: none"> Second grant secured from Coastal Conservancy, draft line-item in DFG budget for FY **** Long-term funding strategy in progress

ATTACHMENT B

Financial Report Format

Cost	Year 1 Budget	Year 1 Expenses	Year 2 Budget	Year 2 Expenses	Total Budget	Total Expenses	RLFF Expenses
Project Personnel (salaries)							
Fringe Benefits							
Travel							
Equipment (> \$300)							
Supplies (< \$300)							
Contractual Services							
Monitoring and evaluation							
Other (please specify)							
Total Direct Costs							
<i>Indirect Costs (not to exceed 15% of direct costs)</i>							
TOTAL PROJECT COSTS							

For **final** reports of projects addressing more than one CCMI outcome, please include an estimate of **total expenditures** devoted to each outcome, using the table below.

Budget per CCMI Outcome (list specific CCMI outcome below)	Percent
<i>Marine Ecosystem Protection/MPAs</i>	
<i>Improved Governance</i>	
<i>Supportive Ocean and Coastal Constituencies</i>	
<i>State and New Sources of Funding for Key Programs</i>	
Total	100%