

The Davis Educational Foundation uses report information in several ways: to learn of your progress and results; as one means of assuring its fiduciary responsibility in carrying out the foundation's charitable purpose; to inform future grant making; and to advise other colleges contemplating similar efforts.

We encourage and appreciate your candid assessment of the project.

Timing

For grants awarded in the spring, reports are due at the end of July of the following year. For grants awarded in the fall, reports are due at the end of January of the following year. Reporting dates can be adjusted to align with the project timeline.

If the grant period exceeds one year, we request you provide an interim report at the end of each year and a final report at the conclusion of the grant period.

Report Components

As part of the report, we will ask you to:

- Confirm the contact information for key faculty and staff.
- Upload a report narrative answering the grant report questions on the following page.
- Upload an expense summary comparing actual expenses with your original, approved budget.
- Upload supporting documents (optional).

Interim report narratives should address the grant report questions to the extent possible, given the project's degree of implementation. Some report questions may be considered optional.

Final report narratives should address all the grant questions. Final reports for multi-year grants should cover the entire grant period, as opposed to the period since the last interim report.

Unexpended Grant Funds and Budget Amendments

- Up to ten percent of the annual award may be reallocated to approved budget lines as presented in the original proposal budget and amended by the award letter. Reallocations of more than 10% of the annual award and/or to new line items require approval from Foundation staff.
- Grant funds remaining at the end of a program year may be carried forward to the following year.
- Grantees with funds remaining at the end of the grant term may request a no-cost extension in conjunction with their final report. No-cost extension requests should include a proposed new end date of up to one year, planned activities, and a budget.

Submitting the Report

Starting with grants awarded in 2022, reports should be uploaded through the Davis Foundations' Grantee Portal. If your grant was awarded in 2021 or earlier, you may email your grant report to def@davisfoundations.org. **We no longer require paper copies of reports mailed to our office.**

Access the Grantee Portal with the same account log in information used to submit your grant application.

<https://davisfoundations-portal.givingdata.com/login>

Please contact us at def@davisfoundations.org if you have questions about your report, need help accessing the Grantee Portal, or to give someone else from your organization access to the Grantee Portal.

Grantee:

Interim Report ____

Final Report ____

Project Title:

Primary Contact:

Telephone:

Email:

Date Awarded:

Amount Granted:

Term:

Grant Report Narrative

In five pages or less, please provide answers to the following questions:

1. Please list your original goals for this project and describe the extent to which the goals were achieved.
2. To what extent did the project advance the foundation's objectives of strengthening teaching and learning practices and controlling costs? Specifically,
 - What methods were used to assess the project's impact on student learning? What were the results of that assessment?
 - How did the project impact costs? Please include quantitative data, if collected.
3. What did you learn in the course of the project that might be beneficial to another college contemplating similar work? Please include challenges encountered and unanticipated outcomes. **Optional for interim reports.**
4. Please tell us how you are sharing information about your project within your department, college/university, regionally, and/or nationally. **Optional for interim reports.**
5. Please describe any changes your institution has made or is making in its curricula, policies, practices and/or structures as a result of this project. **Optional for interim reports.**
6. How do you intend to sustain and build upon, if appropriate, the outcomes of this project? **Optional for interim reports.**
7. How were the Davis Educational Foundation's grant funds spent? Please attach an expense summary comparing actual expenses with your original budget. Please use the budget format from the proposal and briefly explain variances. Final reports should address the full grant period.
8. **Optional:** In an effort to improve our grant making, we welcome your comments regarding our grant application, site visit, award notification and post-grant reporting process. *You may submit this information anonymously through a link in our online reporting portal.*