GRANTEE
MULTI-YEAR REPORTING REQUIREMENTS

Cullen FOUNDATION

PROGRESS REPORT*

This is a requirement for multi-year grant commitments only.

Progress Report Steps

Cullen Foundation will schedule a progress meeting with you during the grant period.

You will receive an email reminder 30 days prior to the progress report due date.

The *Progress Report template* will be provided to you through the Foundation's online portal.

You will submit the Progress Report within 30 days prior to the release of funds payable in years two or three.

What We Request in Your Progress Report

✓ Progress made toward advancing the grant's approved outcomes.

✓ Description of any unforeseen challenges that influenced implementation and how your organization is addressing these challenges.

✓ Account of all grant fund expenditures made (receipts may be required).

✓ Copy of grantee's audited financial statements from your most recently completed fiscal year (audited or reviewed only).

Project & Report Help

Please reach out to Cullen Foundation staff anytime during the grant period with any concerns or if you encounter any significant roadblocks during implementation. If your project encounters delays and/or changes to the scope of the work or budget expenditures you must contact Cullen immediately to get the changes approved.

Please continue to use our online portal to manage the grant process, including submission of reports.

GRANTEE

REPORTING & CLOSE-OUT REQUIREMENTS

FINAL REPORT*

This requirement is for all grantees.

- Grantees will submit a Final Report within 30 days after the completion date. Note: your "completion date" is one year from your final payment date.

- The Final Report template will be provided to you through the Foundation's online portal.

- The grantee will receive an email reminder 21 days before the report due date.

What to Include in Your Final Report

- Progress made toward advancing the grant's approved outcomes.

- Description of any unforeseen challenges that influenced implementation or completion of outcomes and how your organization addressed these challenges to achieve the approved outcomes.

- In retrospect, identify any changes the organization made or should have made during implementation.

- Account of all grant fund expenditures made (receipts may be required).

- Comparison of actual grant expenditures with projected expenses included in your original project budget with an explanation of any variations.

- Copy of grantee's audited financial statements from your most recently completed fiscal year (audited or reviewed only).

- Additional materials: copies of any relevant materials, publications, or media coverage the project produced.

- Copies of any published accounts as well as press releases mentioning the project.

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