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# Mid-year, Year-end and Final Reporting Guidelines

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## Rationale

In order to ensure the funding of effective and responsive services, IMH requires that grantees submit mid-year, year-end and final reports. IMH is interested in all learnings from the projects we fund, both what did succeed and what did not. In this spirit, IMH encourages grantees to use the reporting process as a reflective practice that is inclusive of all stakeholders in order to utilize the information gleaned from this process for program improvement.

## Process

Review your original proposal (including budget and *Accountability Framework*), award agreement letter and any addendum to the original agreement. Submit answers to the questions on the following page in narrative form.

Complete the original *Accountability Framework* that was submitted with your proposal for targets and measures.

Actual outputs should be reported in specific numbers (*12 girls registered for group, 10 group sessions held, average attendance of 8.5 girls per group*) at each interval. Measurement of indicators of success is not required. If you have anecdotal evidence please provide a summary.

In the case of grantees who have proposed an outcome-based evaluation in addition to the IMH requirements, outcomes should be reported as defined in your original plan. Please use the *Outcome Accountability Framework Report* template. You may obtain this template from the IMH office at 566-1852.

Please use the Budget Report Template to record proposed and actual expenditures.

## Due Dates

Due dates of reports are stated in the award letter agreement. Generally, mid-year reports are due thirty days after the halfway point of each funding year and year-end reports are due thirty days after the end of each funding year. Final project reports are due thirty days after the end of the funding period.

Adjustments to this schedule may be negotiated with the IMH Executive Director.

## Questions

*Please note that, as outlined in your award letter, any change in proposed activities, objective outcomes, or budget revisions exceeding 15% of any line item require prior IMH approval.*

1. **Report information**
   * 1. Project start date
     2. Type of report (mid-year, year-end or final)
     3. Reporting period
     4. Report date
     5. Submitted by
2. **What did you do?**
   * 1. Compare your proposed target population with the population you actually served.
        + 1. Give demographic and/or descriptive information of the population served. (*Example: 12 girls between the ages of 12 and 15 residing in the Bywater neighborhood*)
          2. Are the actual and proposed populations the same or different?
          3. If different, provide a justification for the change.
     2. Compare the type and amount of activities you proposed with those you implemented.
        + 1. List and describe the activities you implemented.
          2. How many times did you conduct your activities?
          3. Are they the same or different from the type and amount you proposed?
          4. If different, describe the changes made to the original plan.
          5. If different, provide a justification for the change.
3. **What happened?**
   * 1. Do the assumptions you listed in your original accountability plan appear to be valid?
        + 1. If not, how would you change the invalid assumption(s)?
          2. Please justify this change.
     2. Are the output targets you set for yourself reasonable and attainable?
        + 1. If not, how would you change them?
          2. Please justify this change.
     3. Are the indicators of success you selected actually reflective of success?
        + 1. If not, how would you change your indicators?
          2. Please justify your new selections.
4. **What were/are the barriers to success?**
   * 1. What did/do you plan to do to overcome these barriers?
5. **How have you utilized the learnings from this program to improve the program?**
6. **Budget** 
   * + 1. Did your actual budget match your projected budget?
       2. If not, please justify these changes.
       3. Do you expect any adjustments to the budget in the remainder of your funding period?
7. **What progress have you made towards the sustainability of this program after the end of IMH funding? (if applicable)**