



## HFNJ GRANTEE AND APPLICANT TOOLKIT

### TOOLKIT: INTERIM AND FINAL REPORTS

#### OVERVIEW

Interim and Final Reports help the staff and trustees of The Healthcare Foundation of New Jersey (HFNJ) learn about how your project is going and gauge the difference it is making in your community. Timely and accurate completion of the reports is a crucial step for grantees who hope to build long-term funding relationships, as HFNJ takes seriously the reporting process and takes reporting into account in future decisions for funding. This toolkit provides details on accessing, completing, and submitting your report.

#### I) Accessing Your Report Requirements

All reports should be submitted through HFNJ's online portal, which you can access by [clicking here](#).

Once logged in, you will land on your Applicant Dashboard. This page shows all your active and past grant requests. Scroll to the section labeled "Requirements" or "Follow-Ups" (wording may vary slightly). Look for your grant project and any items marked as "Report Due" or "Pending." Reports are typically published one month before their due date, so if your report does not appear yet, please reach out to HFNJ staff for assistance.

#### II) The Parts of Your Report

Both Interim and Final Reports consist of four main parts: **1) Program Budget; 2) Project Outcomes Chart; 3) Project Narrative; and 4) Supporting Documents.**

The "Attachments" page contains links to blank documents for the Budget, Project Outcomes Chart, and Project Narrative, as Microsoft Word or Excel files. You will fill these out; save them to your computer; and then upload the completed version back to the "Attachments" page.

*Here are brief overviews of the four parts of your report:*

##### 1) Program Budget

In the program budget, you will detail how you have spent the funds awarded for your project.

**Important: Please note that the budget form required for the Interim and Final reports is different from the form you submitted in your application. Make sure you are using the proper Excel template.**

##### 2) Project Outcomes Chart

The Project Outcomes Chart – or Logic Model – is a succinct summary of your project's goals, evaluation plan, and outcomes. For your reports, you should take the final, approved version of the Logic Model that was emailed along with your grant award letter. Update the fifth column with outcomes. By design, the Project Outcomes Chart should be kept short, with outcomes given numerically when possible and not exceeding 1-2 sentences in explanation.

##### 3) The Project Narrative

The Narrative is your opportunity to tell the story of your project at greater length. Tell the story of what is working, what other outcomes and progress you recognize as well as what adaptations and learning have been important. As you look ahead what will you focus on? Note any unexpected surprises or challenges and any environmental issues that impacted your project (e.g., supply chain challenges, severe weather, etc.).

#### 4) Supporting Documents

This is an opportunity to attach additional information that helps us understand your project and its impact. Grantees use this section to share with HFNJ deliverables that resulted from the project (i.e., presentations, job descriptions, marketing materials, CVs of hired employees) and/or media and communications about the project (press releases, articles).



- > You may save your progress at any time. Once you have completed the report, click the “submit” button at the bottom of the page to submit. You should receive a confirmation message indicating your report was successfully submitted.
- > Your Program Officer will often follow up with a telephone call to gather additional information or seek specific data or feedback. Submission of the report is just one part of our ongoing review and conversations regarding your project.
- > You will get an email reminder about one month before the due date of your report informing you that it is ready for you to work on. Please ensure that we have up-to-date contact information for the person who will be responsible for your organization’s report.
- > **Timely submission of your reports is important**, but we recognize that it should be at a time that makes sense for your project. For one-year grants, the Interim and Final Reports are typically scheduled at 7 months and 13 months after project initiation. If you need a different reporting schedule, or if you would like an extension, contact the Grants and Community Outreach Manager at (973) 921-1210 ext. 1101.
- > The best reports are those that tell a story of how your organization has made a path forward toward your ultimate goals. **It is important to share metrics and data, as well as share stories that help us truly understand the impact you are making.**
- > We invite you to share any challenges you have faced implementing the proposed project. We value an open, transparent discussion and will work with you to support your project should reasonable circumstances have created challenges.

