



Interim Report Guidelines for Multi-Year Grants

due at the conclusion of year one

The Meyer Foundation team values our partnership with you and your organization. We hope that this report provides a mechanism for you to convey the impact you have had over the last year as well as the challenges you face and lessons learned in the process. We value transparency and recognize that nonprofit organizations are working in a changing environment that can both present unexpected hurdles and open unexpected opportunities. The purpose of the report is to allow you the opportunity to share your journey over the last year.

Narrative Report

Please submit a narrative progress report of two to four pages. In the narrative, please restate the objectives you proposed in your application, describe the progress you've made in achieving that impact, note any problems or difficulties you are encountering, and discuss any changes you plan to make moving forward. Please note any changes in your organization since the grant was awarded (for example, changes in leadership, governance, facilities, location).

Financial Report

Please upload the following financial documents:

1. **Financial statements for the fiscal year(s) in which the grant was expended.** Please include both a statement of activities (sometimes called an income statement or profit & loss statement) and a balance sheet (sometimes called a statement of financial position).
2. **Financial report on the organization's budgeted vs. actual income and expenses** for the most recently completed fiscal year.
3. **For program or project support grants only (not general operating support grants): Financial report for the funded work**, showing budgeted vs. actual income and expenses. The timeframe for this report should be consistent with the budget submitted with your original request.

Accessing the Online Reporting Portal

To submit your report, click the **Account Login** button at the top of Meyer's homepage (www.meyerfoundation.org). Log in and navigate to the **Requirements** tab, where you can find the link to upload your report documents.

The screenshot shows the Meyer Foundation online reporting portal. At the top, there is a navigation bar with the Meyer Foundation logo and the text "Meyer Foundation". Below the logo, there is a user account section with the text "Account: user@email.com | Change E-mail/Password" and "Last Log in: 8/5/2014 11:07 AM GMT-05:00". To the right of the account section, there are links for "How to Apply", "Online Application Instructions", "Contact Us", and "Exit".

Below the navigation bar, there are two tabs: "Applications" and "Requirements". The "Requirements" tab is selected and highlighted in green. Below the tabs, there is a heading "Requirements" and a dropdown menu with the text "Show New Requirements". To the right of the dropdown menu, there is a checkbox labeled "Hide Viewer Only Requirements".

Below the heading and dropdown menu, there is a table with the following columns: "Form Name", "Project Title", "Type", "Updated", "My Role", and "Action". The table contains one row of data:

Form Name	Project Title	Type	Updated	My Role	Action
Interim Report	to support general operations	Final Report	08/05/2014	Owner	  

Red arrows and text annotations are overlaid on the screenshot to guide the user. One arrow points to the "Requirements" tab with the text "Click on the Requirements box to see your grant reports that are due." Another arrow points to the "Show New Requirements" dropdown menu with the text "Make sure you are showing the correct reports - submitted, in progress, or new." A third arrow points to the "Interim Report" link in the table with the text "Click on the report link to begin working on the report."