

Reports to the Cheney Foundation

Background:

When an organization completes a formal application to the Ben B. Cheney Foundation it is asked to make its request in the form of a project. A project has three distinguishing features:

1. A specific time period with a beginning and an end,
2. Specific accomplishments during that time period, and
3. A specific budget that outlines both what resources the organization needs to achieve the stated accomplishments and where the organization plans to obtain those resources.

The Foundation prefers to make grants to projects rather than to line items because the Foundation understands that often there are line item costs that are vital to a project, but are unlikely to attract a grant. Further, the Foundation feels that it can best measure the value of its grants based upon what projects accomplish rather than by focusing on specific line item expenditures.

Reporting Requirements:

When the Foundation makes a grant a check is sent with a transmittal letter. The representative of the grantee organization (generally the executive director) is asked to both sign and initial the transmittal letter (and make a copy as needed for the organization's files) and return the original letter to the Foundation. That signed letter constitutes an agreement that:

1. The organization acknowledges receiving the grant,
2. The grant will be spent for the purposes outlined in the grant application, and
3. The organization will report on the grant every six months until the project is completed.

Since the Foundation generally makes grants to projects rather than line items in a budget, reports should reflect the progress or completion of the entire project as outlined in the grant application.

One question that is often asked is: When does the Foundation consider that a project is completed? Following are some examples from typical grants:

Capital grant projects are considered completed when the building is occupied and being used for its intended purpose.

Equipment grant projects are considered completed when the equipment is purchased, installed, and being used for its intended purpose.

Program/Start-up grants are considered completed when the time period stated in the application has been completed (or a modified time period if the beginning of the program/start-up was delayed).

Format:

The Foundation does not provide a "report form." The Foundation prefers that reports be in the form of a letter. Letters should be no longer than two to three pages, excluding any budget reconciliation forms you may wish to supply.

Grant reports provide an opportunity for the grantee to build a rapport with the Foundation. The Foundation encourages grantees to share important information beyond the basic grant report. For example, if an organization learned important lessons during the implementation of a new project it should share those observations.