

Walton Family Foundation Environment Program Narrative and Financial Report Guidelines

All grants issued by the Walton Family Foundation require submission of narrative and financial reports. Your grant letter indicates the schedule for these reports, which may include one or more required interim reports in addition to the required final report. Required reports must be received and approved by the Foundation before additional grant disbursements will be made.

Please follow the guidelines below to prepare your reports. Include the grant number on all reports. This number can be found on your grant letter.

I. Narrative Report

A. Summary of Progress to Date in Achieving Agreed Outputs and Outcomes

Please use the attached Progress Report Summary Table to summarize progress to date (since the project started) in achieving the outputs and/or outcomes that were agreed with your Foundation Program Officer. Please follow the instructions at the top of the table.

B. Additional Project Information for Reporting Period (Guide: 2 -10 pages)

Please briefly comment as described below on work conducted under the current grant during the reporting period. For interim reports, the reporting period is the period since the project started (for the first interim report) or since the end of the period covered in the last interim report. For the final report, the reporting period is the full grant period.

For final reports and any required interim reports, please include:

- The most notable successes and obstacles (e.g., the top 2-5 of each).
- Any changes that were made to the project during the reporting period (e.g., to the project workplan, staffing, partners, or timeline).
- A description of any formal evaluation conducted on the progress of the project, the results, and recommendations.
- Key lessons learned.

For interim reports only please also include any planned or proposed changes to the project going forward, including:

- Any proposed changes to the outputs or outcomes. (*Note – These will need to be approved by your Foundation Program Officer as part of his or her review of your report.*)
- Any changes to the project workplan, timelines, partners, assumptions, theory of change or other key project elements. (*Note – Your Foundation Program Officer will let you know if these require approval.*)

II. Financial Report and Budget Narrative for Reporting Period and to Date

Please complete a financial report and accompanying explanation for both the reporting period and to date, as described below. As noted above, for interim reports, the reporting period is the period since the project started (for the first interim report) or since the end of the period covered in the last interim report. For the final report, the reporting period is the full grant period.

Please report against only the Walton Family Foundation funds, not against the full project budget (if there is a difference).

For final reports and any required interim reports, please:

- Use the attached template to provide an accounting of funds spent on the project.

- Complete a separate spreadsheet for each subgrant (if applicable).
- Explain on the “Budget Variance Detail” tab any variances of 15% or more in actual expenses relative to the budgeted expenses as specified in your approved project budget.

For interim reports only please also:

- Identify and explain any proposed budget changes. (*Note – Your Foundation Program Officer will let you know if these require approval.*)

Send all reports electronically to environment@wffmail.com

Supplemental materials (e.g., audio or video tapes, formally bound reports, press clippings, legal documents, brochures, reports) should be sent only if directly related to program goals and after discussion with your Foundation Program Officer.

Submit any written materials to:

**The Walton Family Foundation
919 18th Street, NW, Suite 650
Washington, DC 20006**