

Your annual progress report to the Kellogg Foundation is an important document. It is a permanent record of what you are achieving and what you are learning in the process which can help others. Preparing this report allows you—and the Foundation—to carefully analyze your work and the context in which that work is being done. This analysis helps to shape future grantmaking directions.

Each annual progress report should address the results of the project year just completed. The Foundation does not expect the approved activities to unfold exactly as originally planned. In fact, success is often achieved because a project made changes. The lessons learned in making changes or from not being able to attain certain goals are as important as the successful outcomes. We encourage you to share your successes and frustrations.

The format below is suggested as a means of helping you to **respond to the important evaluation questions that were identified specifically for your project**. Many of these questions state in general terms what your own project has stated in specific terms. Feel free to modify this format if needed as long as substantive points are covered for your project. Strive to be brief but complete. Each annual report should build upon the last, containing just enough information from previous project years to refresh the reader's mind and to describe the growth of the project.

## **Report Preparation**

Electronic submission is preferred whenever possible.

### If submitting in hard copy:

- Reports should not be bound or expensively produced, since all reports must be disassembled for electronic imaging and filing.
- Reports should be submitted on standard size light-colored paper to expedite imaging.
- Send only one original of the report.
- Please do not send videos or photo albums unless requested by the Foundation.

Any evaluation questions outlined in “Progress Toward Goals” below must be addressed in the narrative report. If your agreement includes an external evaluation, the entire report must be electronically submitted to Christine Kwak at [christine.kwak@wkkf.org](mailto:christine.kwak@wkkf.org). You also have the option of submitting the narrative along with the evaluation report electronically. Until further notice, we are still requesting that you send your financial reports in hard copy.

**To aid in the review process, the financial report should appear at the beginning of the narrative report.**

## **Project Summary (1-2 pages)**

This introduction to the full report tells the reader what to expect by “setting the scene.”

Succinctly restate the project's intended goals, the strategies you have undertaken to achieve them, and the methods by which you are evaluating these efforts. Weave into this brief summary the important questions for evaluation which are stated below. Note if changes have been made in any goals or strategies.

### **Progress Toward Goals (2-10 pages)**

This section will provide detail regarding progress toward intended goals during this grant year. Respond to the specific evaluation questions for your project as outlined below:

#### **Evaluation Questions**

1. How was the visibility and engagement of communities of color in philanthropy increased?
2. In what ways was knowledge created and disseminated to improve practice among leaders and donors of practice?
3. In what ways has collaboration increased networking across communities of color?
4. How successful was the project in catalyzing the process of personal giving plans being established and initiated?
5. Are there reported results of increased giving by donors of color either within or without communities of color?

In addition, if not already addressed, please consider the following:

1. Summarize your progress toward achieving the stated goals of your project.
2. Does your experience to date suggest that original expectations for achieving these outcomes were realistic? If not, why not? How will you deal with unrealistic expectations? If you have modified your intended outcomes, indicate the changes.
3. Have there been any unanticipated outcomes? What are they?
4. Describe activities undertaken this year and lessons you have learned from this year's experiences.
5. If some intended activities were not undertaken, please note them and explain why they were not pursued.
6. What problems have arisen and how are they being addressed?
7. Describe any new activities or modifications and why they were added.
8. Share other pertinent observations/accomplishments.
9. Describe factors or circumstances (positive and/or negative) within your environment affecting progress toward achieving goals either generally or as they relate to specific activities.

10. If your project is collaborating with other organizations or institutions, describe how these relationships are helping or hindering your progress toward addressing needs.

**Future Plans (1-2 pages)**

- A. List the project and evaluation activities you intend to pursue during the next project year for each intended outcome and note whether and how they involve modifications. (This list is what you will report on next year.)
- B. What will be done this coming year to increase the likelihood that the project will be self-sustaining by the end of the grant period?
- C. What indications are there that this project can (or cannot) be adopted elsewhere?

**Dissemination (1/2 page)**

- A. What information or evaluation findings from your project have been made available to the field and how?
- B. What plans do you have, if any, at this time for disseminating information about your project during the next year and at the conclusion of Foundation funding?

**Other (1/2 page)**

1. Please list issues that you would like to discuss with your Foundation program director.
2. Grantees may attach appendices which may help to clarify information contained in the body of the report. Be selective! Do not include copies of every newspaper article, brochure, or detailed statistical report having to do with the project. If possible, attach a copy of the organizational chart both for the project and for its place within the greater institutional structure.
3. Attach evaluation reports generated during the past year as appropriate if they are not contained within your project report.