



MONTEREY
PENINSULA
FOUNDATION

GRANT REPORTING INFORMATION (FINAL REPORTS/MID-YEAR REPORTS)

The below information is needed or required to complete your final report and mid-year report. We strongly recommend compiling all information before starting the application in our system.

BEFORE YOU BEGIN

- Visit <https://portal.mpfca.org/grant> to access your report.
 - If you have not registered with MPF's new grant portal, please email hk@mpfca.org to request log-in information.
- Available on our website are budget templates, a guide to navigating the Online Portal, an FAQ for the Cycle shifts and how to select a home cycle for your applications, as well as best practices.
- Make sure to save your work on a separate document, as the report module may time out if it takes longer than 20 minutes to complete. **The system will not save your information.**
- To access all saved or submitted applications and reports, please log-in to the Online Portal.
- Add noreply@salesforce.com to your safe senders list to ensure receipt of our emails. Check your spam/junk folders periodically to make sure you have important correspondence.

REPORTING DEADLINES

In accordance to the application you received your grant award, all final reports/mid-year reports must be submitted by the following dates:

- **Summer Cycle:**
 - Reports due March 1
- **Fall Cycle:**
 - Reports due July 1
- **Winter Cycle:**
 - Reports due November 1

These deadlines apply to **all** final reports/mid-year reports in accordance to the cycle you received your award. Monterey Peninsula Foundation requires all grantees to complete reports for active grants. If you do not know which cycle applies to you, please contact hk@mpfca.org.

Grantees should make every effort to ensure their reports includes all financial attachments required in the reporting process. If an application is received incomplete, it may delay the review future application review or payment of multi-year award.



HELPFUL REPORTING TIPS

- Multi-year awards are required to submit a mid-year report AND a final report. Agencies must successfully complete the mid-year reports in order to receive the next allocation of funding.
- Reporting requirements for matching awards will be noted on the award email.
- The character limits are throughout the report in the parenthesis – i.e. (2000) or (3000).
- If you are over the character limit, the report will let you go to the next page.
- Your application will not allow you to move to the next section unless **is filled out completely.**
- The character count includes all punctuations and spaces. Although Microsoft Word may say that you are under the character count, our system includes all paragraph separations and spaces.
- If you have not fully expended all MPF Funds by the report deadline, you must provide a written request for an extension via email. Extensions are approved on a case-by-case basis. Please send all extension requests to Hana Kong, Program Officer, at hk@mpfca.org.
- You cannot apply for a new grant without completing the report on a previous award.
- Before submitting your next application, spend some time thinking about the right timeline for your organization to apply. Reach out to MPF staff if needed to discuss the right timeline for your organization.



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FINAL REPORT REQUIREMENTS

Narrative Section – 3 questions

1. Actual Outcomes of Program (character limit including spaces: 2,000)
2. Challenges to Program (character limit including spaces: 2,000)
3. Number of Constituents Served

Financial Documents

1. Budget to Actual Comparison
 - a. Must show budgeted and actual income and expenses
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MID-YEAR REPORT REQUIREMENTS

(MULTI-YEAR AWARDS ONLY)

Narrative Section – 3 questions

1. Actual Outcomes of Program (character limit including spaces: 2,000)
2. Challenges to Program (character limit including spaces: 2,000)
3. Number of Constituents Served

Financial Documents

1. Year budget to actuals comparison (Must show budgeted and actual income and expenses)
2. Year 2 budget for the next payment period
3. Most recent audit or financial review if single year award amount meets the following criteria:
 - a. Most recent audit for annual award over \$75,000; **OR**
 - b. Most recent financial review for annual award over \$25,000 but less than \$75,000

SAMPLE PROGRAM BUDGET

Organization Name: ABC Nonprofit
Program Name: Literacy program
Program Date: 7/1/15 – 6/30/16
Request to: Monterey Peninsula Foundation

INCOME:	Monterey Peninsula Foundation	Other Proposals	Committed Funds	Program Revenue	TOTAL	Actuals <i>(Leave this column blank until grant report)</i>
Monterey Peninsula Foundation	\$25,000				\$25,000	
Foundation A		\$57,500	\$25,000		\$82,500	
Foundation B			\$2,500		\$2,500	
State Grant		\$2,500			\$2,500	
Annual Silent Auction				\$10,000	\$10,000	
Donations from individuals				\$5,000	\$5,000	
	\$25,000	\$60,000	\$27,500	\$15,000	\$127,500	

EXPENSES:	Monterey Peninsula Foundation	Other Proposals	Committed Funds	Program Revenue	TOTAL	Actuals <i>(Leave this column blank until grant report)</i>
Program Manager	\$25,000	\$14,000	\$25,000		\$64,000	
Part-Time Staff		\$10,000	\$2,500		\$12,500	
Taxes and Benefits		\$1,000			\$1,000	
Evaluation		\$5,000			\$5,000	
Supplies		\$5,000			\$5,000	
Travel				\$10,000	\$10,000	
Publications and Postage		\$5,000			\$5,000	
Rent and Utilities				\$5,000	\$5,000	
Staff Training		\$20,000			\$20,000	
	\$25,000	\$60,000	\$27,500	\$15,000	\$127,500	