



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 report 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 Ambry Capistrano at ac@mpfca.org to request log-in information.
- Available on our website are budget templates, a guide to navigating the Online Portal, 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 with the cycle you received your grant award, all final reports/mid-year reports must be submitted by the following dates:

- **Spring Cycle (formerly Winter Cycle):**
 - Reports due December 1
- **Fall Cycle:**
 - Reports due June 1

Monterey Peninsula Foundation requires all grantees to complete reports for active grants. If you do not know which cycle applies to you, please contact Ambry Capistrano at ac@mpfca.org.

Grantees should make every effort to ensure their reports include all financial attachments required in the reporting process. If a report is incomplete, it may delay the review of future applications or payment of multi-year awards.



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.
- Character limits are throughout the report in parenthesis – i.e. (2000) or (3000).
- The character count includes all punctuation and spaces. Although Microsoft Word may say that you are under the character count, our system includes all paragraph separations and spaces. If you are over the character limit, the report will not let you go to the next page.
- Your report will not allow you to move to the next section unless it **is filled out completely.**
- You cannot apply for a new grant without completing the report on a previous award.
- If you have not fully spent 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 email all extension requests to Nancy Enterline, VP of Philanthropy, at ne@mpfca.org.

MPF Grant Cycles

- Each Grant Cycle has a consistent reporting deadline each year – Fall Cycle, June 1 and Spring Cycle – December 1. Grant terms are calculated based on reporting deadlines (typically 8 months). Please plan accordingly.
- We do not allow agencies to switch cycles once they have made their strategic choice.
- **Missed Home Cycle reporting deadlines carry a consequence of waiting ONE YEAR for the next Home Cycle application deadline.**

If you have concerns regarding the deadlines or the impact on your reporting requirements, please contact Ambry Capistrano, Philanthropy Program Manager, at ac@mpfca.org or 831.649.1533.



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