

**Multi-Year Annual Interim Narrative and Financial Report**

The Stuart Foundation appreciates your time and effort in preparing reports. The information you provide is very valuable to our partnership. These reports:

* Serve as a timely opportunity for your organization and the Foundation to be in touch around our partnership.
* Help the Foundation understand your work more deeply, including your successes, challenges, learnings, and aspirations.
* Where appropriate, assist the Foundation in entering conversation about opportunities for future collaborations and/or providing additional support in areas where partners are facing challenges or are seeking to amplify a particular area of their work.

**Submission Instructions:**

All reports should be uploaded to our Grantee Portal linked [here](https://stuart.my.site.com/FGM_Portal__CommunitySignin).

* If you do not know your username for our grantee portal, please email [portal@stuartfoundation.org](mailto:portal@stuartfoundation.org).
* If you have not registered for our grantee portal, please complete the online portal user registration form linked [here](https://stuart.tfaforms.net/17). Upon completion of this form, you will be invited via email within two business days to complete and submit your report through our online grantee portal.

Currently, we only require a file upload to satisfy our reporting requirements and there is a space for you to leave any additional comments that you would like to bring to our attention.

If you need any further clarification or have additional questions about this document or your report, please contact your Partnership Manager. We appreciate your honest feedback and reflection, and we look forward to reading your report.

**Narrative Questions:**

1. What would you like us to know about your work and what has happened in your organization since the start of the grant? What are your plans for the coming year? Please share any key activities and/or any major (internal or external) changes that have impacted and/or will impact your work.
2. Please describe key partnerships, coalitions, and/or collaborations that have been instrumental to your work so far, including the nature and length of your relationship.
3. Please highlight key communications products and media coverage since the start of the grant. Are there any events or convenings that you want to highlight?
4. What have you learned so far?
5. *For Project Support Grants only*: Discuss how your project has met, is working to meet, or is unable to meet the goals as defined by your organization in its original proposal. Feel free to include updated goals and/or outcomes. Please share any specific achievements or setbacks encountered.

*Note: We understand that this is an interim report, and your work may not yet be finished. Please tell us as much as you can at this point in your effort.*

**Financial Questions:**

1. Please provide a brief overview of the organization’s current financial health. If the audit or current year financials reflect a deficit, please provide an explanation and the organization’s approach to addressing the deficit.
2. In the portal, please upload the following documents along with your report:

**Non-University Grantees**

* **Current Year Financial Statements (unaudited) through most recent quarter-end**
  + Statement of Financial Position (also known as Balance Sheet)
  + Statement of Activities (also known as Income Statement)
* **Other Documents**
  + Current Year Operating Budget
  + Multi-Year Interim Financial Report (for project support grants only)
  + List of pending and secured revenues, source, and duration
  + Most recent IRS Form 990

**University Grantees**

* Current Year Operating Budget for the center (not the affiliated department or college/university)
* Multi-Year Interim Financial Report (for project support grants only)
* List of pending and secured revenues, source, and duration