

**Annual Report: Instructions and Form**

**Purpose**

The purpose of this report is to provide the Douglas B. Marshall Jr. Family Foundation with an update on your project, including activities, accomplishments, challenges and expenditures. It also provides an opportunity to inform us of any changes to project objectives, plans and budgets that are anticipated or have already occurred.

**Instructions**

To complete the Annual Report, please complete both the Annual Report Form (found below) as well as the Annual Financial Report Template, provided in the accompanying Microsoft Excel document. Please complete both parts of the report and submit them by the deadline specified in your grant agreement letter. Most reports will be 5-10 pages long. We strongly prefer that the report not exceed 12 pages, excluding pictures, attachments, and appendices such as scholarly articles or survey results.

Please email the completed Annual Report to dbmjrfoundation@gmail.com AND rdietz@legacytrust.com. Please attach the narrative report as a Microsoft Word document and the financial report as a Microsoft Excel document.

If you have any questions or concerns prior to submitting the report, please feel free to contact us at:

**Address:**Douglas B. Marshall Jr. Family Foundation
1415 Louisiana Street, Suite 1900
Houston, Texas 77002

**Tel:** (713) 651-2328

**Fax:** (713) 651-8893

**E-Mail:** rdietz@legacytrust.com

 dbmjrfoundation@gmail.com

We appreciate your efforts in submitting reports in a timely manner. Your feedback and responses help further our understanding of your project and our ability to support it.

## Report Prepared By: Date Submitted:

I. **Organizational Information**

|  |  |
| --- | --- |
| Organization Name |  |
| Project Name |  |
| Project Start Date |  |
| Project End Date |  |
| Grant Amount (US$) |  |
| Reporting Period |  |

**Project Director**

|  |  |
| --- | --- |
| Full Name |  |
| Title |  |
| Email Address |  |
| Phone |  |
| Mailing Address |  |

**Primary Contact for this Grant**

|  |  |
| --- | --- |
| Full Name |  |
| Title |  |
| Email Address |  |
| Phone |  |
| Mailing Address |  |

**Signature of Organizational Representative:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Date:** \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

II. **Executive Summary**

Please provide a brief summary (250 words or fewer), covering the past year, of:

1. Progress made toward meeting the project goals outlined in the grant application/ last annual report
2. Key educational outcomes achieved (e.g. number of students graduated, completion of a scholarly article, etc.)
3. Changes in project objectives, activities and plans
4. Risks and challenges the project has encountered and strategies for overcoming them
5. Lessons learned

III. **Progress and Results**

Please describe, for the past year:

1. Progress made toward meeting the project goals outlined in the grant application/ last annual report
2. Key educational outcomes achieved (e.g. number of students graduated, completion of a scholarly article, etc.)
3. Changes in project objectives and/or planned activities
4. Key evaluation results, if available

In addition to providing a narrative report, please complete the following table, adding rows as necessary:

|  |  |
| --- | --- |
| Project Goal | Progress Toward Goal |
|  |  |
|  |  |
|  |  |

IV. **Risks and Challenges**

1. Describe significant risks and challenges that the project faced in the past year
2. Indicate how your organization is addressing these risks and challenges.

V. **Lessons Learned**

1. What lessons have you learned from implementing the project over the past year?
2. Please highlight any key findings on:
* What works to improve educational outcomes
* Project sustainability
* Project scalability

VI. **Ongoing Plans**

1. Describe any anticipated changes in project objectives, activities and plans compared to the grant proposal/last annual report
2. What are your plans for the next year of the project?

VII. **Budget**

Please complete the Annual Financial Report Template. In addition, please summarize:

1. Any existing or anticipated variations from the proposed budget exceeding 25% in either direction
2. Financial risks (if any) and how you plan to manage them