

**INSTRUCTIONS FOR THE  
ADVOCATE BETHANY HOSPITAL COMMUNITY HEALTH FUND GRANT  
INTERIM PERFORMANCE REPORT**

**PURPOSE**

Recipients of Advocate Bethany Hospital Community Health Fund grants must submit an interim performance report for each year of funding that has been approved by the Fund Board. Submission of this report is required per the Advocate Bethany Hospital Community Health Fund Grant Agreement, which is signed each year by all grant recipients. The interim performance report should demonstrate whether adequate progress has been made toward meeting the grant recipient's program objectives. The information in the interim report will provide the Fund Board with the information needed to determine whether a grant recipient has demonstrated adequate progress in order to receive a second installment payment of the recipient's total grant award. The information in the interim report will also provide the grant recipient with an opportunity to assess the strengths and challenges of the recipient's program, and to determine what is needed in order to support/maintain the success of the program throughout the remainder of the grant term.

**PLEASE NOTE: The deadline for receipt of the 2008 interim report is Monday, June 2, 2008 by 5:00 p.m.**

**GENERAL INSTRUCTIONS**

- All reports must be typed. The Bethany Fund staff will be unable to accept handwritten reports.
- You must submit the **(A) Grant Performance Report Cover Sheet, (B) Program Summary, (C) Progress Towards Goals/Objectives Information, (D) Program Financial Report Form, (E) Financial Report Information and as applicable, (F) Additional Information** in order for the interim report to be considered complete. Failure to submit one or more of the above components will result in the report being considered incomplete. Reports missing one or more of the above required components will not be reviewed until all components of the report are submitted. Please make sure that you have submitted an entire report so as to not delay payment by the Fund Board.
- Please submit one (1) original and one (1) copy of the mid-year report.

**A. INSTRUCTIONS FOR THE GRANT PERFORMANCE COVER SHEET**

Complete the Grant Performance Report Cover Sheet with the appropriate information. Please see information below for instructions.

**1. GIFTS Number**

This is your grant award number. It is located on your cover letter that is included in this packet. Please copy this number from your cover letter and indicate it in the space provided.

**2. Grantee Name**

Please indicate the legal name of the grantee organization. If your organization has a fiscal agent, please also indicate the name of the fiscal agent, as the fiscal agent is the legal grantee who has agreed to assume all responsibility for all aspects of the program.

**3. Program Title**

Please indicate the name of your program as indicated on your proposal application.

#### **4. Grantee Address**

Please indicate the address of your organization. If the address has changed since your organization was awarded a grant, please indicate this by checking “yes” in the corresponding box. If the address of the organization has not changed, please mark the “no” column.

#### **5. Location of Organization**

Please indicate the location of your organization. The area checked should correspond to the address as indicated in the grantee address (Section 4).

#### **6. Priority Area(s) Addressed in Proposal**

Please indicate the Fund Priority Area(s) that your program addresses as indicated on your organization’s proposal application. Please check all that apply.

#### **7. Program Areas**

Please indicate the location(s) that are served by your program. Please check all that apply.

#### **8. Program Director’s Information**

Please indicate the program director’s name, exact title, phone, fax and e-mail address. This is the person who the Bethany Fund staff will contact regarding your grant funded program.

#### **9. Reporting Period Information**

- **Due Date:** The interim performance report for the 2007 grant awards **must be received by Monday, June 2, 2008 by 5:00 p.m.** Your organization will need to provide program and budget information which includes program activities from January 1, 2008 through April 30, 2008.
- **Note:** The start date and the end date for the period for which you are reporting have been completed on the form for you.

#### **10. Budget Information**

**Note: For the purposes of this report, the term budget expenditures means allowable grant obligations incurred during the periods specified below.**

- Report your organization’s entire grant award amount in Section 10a. This is the total amount of funding your organization has been awarded for the 2007 grant term.
- Report your actual budget expenditures for the **period from January 1, 2008 through April 30, 2008** in Section 10b.

#### **11. Certification**

The grantee’s authorized representative must sign the certification for the Grant Performance Report Cover Sheet. The authorized representative is the person responsible for the management of the entire organization (e.g. Executive Director, President, etc.) and may not be the same person as the person who is responsible for the implementation of the grant funded program.

### **B. INSTRUCTIONS FOR THE PROGRAM SUMMARY**

Provide a one (1) to two (2) page Program Summary of your project to date. Provide highlights of the program's goals/objectives, the extent to which the expected outcomes have been achieved, and what contributions the program is making to the community.

### **C. INSTRUCTIONS FOR THE PROGRESS TOWARDS GOALS/OBJECTIVES INFORMATION**

In your approved grant application, you established one or more program goals stating what you hope to achieve with your funded grant program. Generally, one or more outcome objectives were also established for each that serve to demonstrate whether you have met or are making progress towards meeting your program goal(s).

Tell the story of the status of your program. Provide information to show how you are making progress towards meeting each program objective that was listed in your approved application. In your discussion, provide a brief description of your activities and accomplishments that are related to each program objective; also include information on any obstacles or challenges you have faced in your attempts to meet your objectives. **You must provide information on each program objective that was included in your approved application.** If expected progress was not made toward meeting a program objective, or a planned activity was not conducted as scheduled, please provide an explanation. Include a description of the steps and a timeline for addressing the problem(s) or issue(s).

### **D. INSTRUCTIONS FOR THE PROGRAM FINANCIAL REPORT FORM**

- List all of the amounts for each category of the budget form that were included in your approved grant application in Section A.
- Indicate the amount of funds that have been expended in each category from January 1, 2008 through April 30, 2008 in Section B.
- For each category on the budget form, subtract the amount in Section B from Section A to indicate the amount of funds that remain for each category to be expended throughout the remainder of the grant term. Indicate the amounts in Section C.
- Add columns A, B and C separately. Place the total for each column in the “Total” section of the form.

### **E. INSTRUCTIONS FOR THE FINANCIAL REPORT INFORMATION**

- Indicate whether or not you have expended funds at the expected rate per your program’s timeline. Provide an explanation if you *did not* expend funds at the expected rate during the reporting period.
- Describe any anticipated changes in your budget for the remainder of the grant term that will require prior approval from the Bethany Fund staff. Please remember per the grant Agreement that budget variances in any category of fifteen percent (15%) or more will require Grantor’s prior approval in writing.

### **F. INSTRUCTIONS FOR ADDITIONAL INFORMATION (Optional)**

- Describe any changes that you wish to make in your grant program for the duration of the grant term that are consistent with the scope and objectives of your approved application.
- Provide any other appropriate information about the status of your program that you would like the Bethany Fund Board to know, including any unanticipated outcomes or benefits from your program.