



WELCOME

Strengthening Youth Programs in Indiana

Grantee Information Session

We will begin shortly.



Lilly Endowment Inc.
A Private Philanthropic Foundation

Agenda

1. Welcome
2. Reporting Requirements
3. Report Structure
4. How to Submit
5. Q & A
6. Closing





Reporting Guidelines



Reporting Guidelines

- Two types of reports are required.
 - Program report
 - Financial report
- Reports are sequential with the expectation that each build on the responses from the last report.
- The final report should be a summary of the results from the grant-funded activities.
- Reports are due every six months as set forth in your grant agreement.



Reporting Schedule

Period Covered

09/01/2023 - 03/31/2024

04/01/2024 - 09/30/2024

10/01/2024 - 03/31/2025

04/01/2025 - 09/30/2025

10/01/2025 - 3/31/2026

04/01/2025 - 08/31/2026

Reports Due

April 30, 2024

October 31, 2024

April 30, 2025

October 31, 2025

April 30, 2026

October 31, 2026





Report Structure



Report Structure

- Agency Information
 - Name and Email of Person Completing Report
 - Organization
 - Grant Number
 - Number of Youth Served this Period
 - Cumulative Number of Youth Served
- Program Narrative (four pages)
- Financial Report (two pages)



Program Narrative

Describe the impact of the grant on your program/service organization by answering the following prompts.

1. Explain the degree to which the grant helped your organization enhance its programs and services resulting in an increased number of youth served and/or improvements in how youth are served.
2. Detail how your program or service addressed the needs of youth.
3. Describe the extent to which and how your organization is now positioned to continue to provide the enhanced programs and services to youth.



Program Narrative

4. Describe how your use of funds addressed SYPI priorities.
 - Enhancing the welfare and safety of youth
 - Identifying and addressing the social and emotional needs of youth
 - Delivering educational experiences for youth that supplement classroom learning
 - Developing character traits and leadership skills in youth
 - Providing safe and enriching out-of-school time learning environments for youth

5. Describe how your use of funds addressed the special focus of the grant.



Financial Report

There are two parts to the financial report: 1) budget narrative and 2) the financial report form.

Budget Narrative (one page)

Provide a brief budget narrative detailing the use of funds of program/capacity building/capital projects accounting for the cost and the amount of the expense.

Financial Report Form (one page)

Submit a completed financial report form found with your grant agreement.



Financial Report Forms

FINANCIAL REPORT FORMAT				
When Grant is Funding 100% of Approved Budget				
Example				
Name of Grantee				
Grant #0000 0000				
(Specify reporting period)				
Budget Categories	Approved Budget	Expenditures		Budget Less Cumulative
		For Period	Cumulative	
(Please list items from approved grant budget.)	\$	\$	\$	\$
TOTALS	\$	\$	\$	\$
CASH SUMMARY				
Total Grant Payments Received				
Cumulative Expenditures (per above)				
Cash Balance			\$	
(Name)			(Name)	
Grant Administrator			Finance: V.P./Controller	

- Everything on the financial report is based off the “TOTAL” approved budget.
- A full set of instructions for completing these forms were included in your signed grant agreement.
- Two signatures are required.
- Don’t forget to include the name of your organization and the grantee number.
- This report is available electronically as an excel spreadsheet upon request by emailing strengtheningyouth@lei.org.



Financial Report Reminder

The Grantee may reallocate budgeted items only as follows:

Grants of \$100,000 or less - Total reallocations among budgeted line items up to 10% of the grant amount may be made without prior notice to the Endowment. In addition, reallocations to any new line item(s) up to 5% of the grant amount may be made without prior notice to the Endowment. Please note any new line item(s) must be aligned with the stated grant purpose. Such permitted reallocations must be noted on the Grantee's financial report covering the relevant period.



Financial Report Reminder

The Grantee may reallocate budgeted items only as follows:

Grants of more than \$100,000 and up to \$1,000,000 - Total reallocations among budgeted line items up to the lesser of (i) 10% of the grant amount or (ii) \$25,000 may be made without prior notice to the Endowment. In addition, total reallocations to any new line item(s) up to the lesser of (i) 5% of the grant amount or (ii) \$12,500 may be made without prior notice to the Endowment. Please note any new line item(s) must be aligned with the stated grant purpose. Such permitted reallocations must be noted on the Grantee's financial report covering the relevant period.





How to Submit



How to Submit

Additional details: You may include photos, data reports and other items, however, they are not substitutes for the four-page narrative and two-page financial report.

Reminder: First report is due April 30, 2024.

Send all documents via email to strengtheningyouth@lei.org.

Put your organization's name and the grant number in the subject line of the email.

Please do not email report to any other Endowment mailbox.





Q & A





Thank you!

Additional questions?

Send an email with the
subject line SYPI Reports to
strengtheningyouth@lei.org
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