



## Promoting Strategic Cost Containment Policies to Preserve and Expand Access General Instructions

- Following are MeHAF's reporting requirements for the Cost Containment grants:

2 narrative reports (6 months and 12 months) accompanied by 2 financial reports (6 months and 12 months) each year.
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- Interim narrative and financial reports cover the first six months of the funding year and are due six weeks after the end of this period, or August 14, 2009.
  - Final narrative and financial reports cover the funding year as a whole and are due six weeks after the end of this period, or February 12, 2010.
  - Narrative and financial reports shall be completed in compliance with the Foundation's instructions on forms created by the Foundation. These are available on the MeHAF website at [www.mehaf.org](http://www.mehaf.org).
  - Grantee shall retain copies of all reports in its files for a period of not less than four (4) years after expiration of the Period.
  - Future funding from the Foundation is conditional upon the receipt of timely and acceptable interim and final narrative and financial reports.
- Reports will be submitted online. For questions or assistance in submitting reports, contact Cathy Luce, Grants Manager, at 620-8266, ext. 104 or [cluce@mehaf.org](mailto:cluce@mehaf.org)
  - Direct programmatic questions to: Barbara Leonard, Vice President for Programs, [bleonard@mehaf.org](mailto:bleonard@mehaf.org) or 620-8266, ext. 102.

### Promoting Strategic Cost Containment Policies to Preserve and Expand Access--Narrative Report Form

Please address each question in the appropriate area of the table below and in the attachments. Your report should cover six months of activities if an interim report or twelve months if a final (end of year) report.

Organization Name:			
Project Number:			
Project Title:			
Total Grant:	\$		Current Year Grant: \$
Project Director:			
Phone:			
Fax:			
E-Mail:			
Reporting Period:			
<p>1. <u>Briefly</u> update us about your organization and relevant environmental or contextual factors. Please note any significant changes or challenges that have occurred during the current reporting period, such as changes in project staffing. If none, state “none.” (Maximum: 250 words)</p>			
<p>2. <u>Briefly</u> describe in the space below any significant changes or adjustments in approach from your original proposal. If none, state “none.” (Maximum 250 words.)</p>			
<p>3. In a brief narrative, summarize your overall progress in completing planned activities during the reporting period. Include a discussion of accomplishments, key collaborators, obstacles you encountered and resolved, and challenges that may not yet be resolved. Include in the discussion of accomplishments any policy action that has been undertaken as well as the extent to which key project and policy benchmarks have been achieved. If the MeHAF-funded work is part of a larger effort, please clarify how the MeHAF funds have enhanced the work. (Maximum: 750 words)</p>			
<p>4. Describe what you plan to accomplish by December 31, 2010. What key policy opportunities exist and how will they be refined, pursued, or realized? (Maximum: 500 words)</p>			
<p>5. Please describe any technical assistance needs you may have and list information that you may need to support your work. (Maximum: 250 words)</p>			

6. Describe new relationships that have been established or enhanced and activities that have been undertaken with other Cost Containment grantees. (Maximum 250 words)

7. Please attach an updated version of your one-page project summary (as developed for the February 2009 Grantee meeting. The summary should include: *organization name and lead staff with contact information; project title; partner organizations; project summary; purpose, activities, key benchmarks and accomplishments to date; opportunities for collaboration.* If no updates are needed, please write N/A in the box below.

**Financial Report**

Please fill out the Financial Report form (an EXCEL spreadsheet). The same form is used for both Interim and Final reports. Please also attach to the Financial Report form a brief budget narrative (500 words maximum) that describes any significant deviations (over 10% of your MeHAF request for the current budget year) from the original proposed budget. **Indicate if you anticipate having funds remaining at the end of the year.**