

US PROGRAM PROGRESS REPORT GUIDELINES

BILL & MELINDA
GATES foundation

The purpose of the Progress Report is to provide written documentation of the current status of your grant with a focus on critical results and lessons learned. This report gives you the opportunity to provide (i) a frank assessment and status report about how the project is progressing and (ii) justification for any proposed revisions in the project plan, timelines, milestones, and budget.

As stated in your grant agreement letter, interim payments, if any, will be made following receipt and satisfactory review of these narrative and financial reports. We will provide you with feedback on your Progress Report within six weeks of receiving your report.

The following guidelines describe in detail each section that should be included in your report. Limit your answers to no more than 10 pages. Also note that this document is subject to the www.gatesfoundation.org [Privacy Policy](#) and [Terms of Use](#).

I. Executive Summary

Briefly summarize, in one to two paragraphs, the project scope and your implementation progress over the past period. Address whether you are on track, encountering difficulties, or advancing ahead of expectations. Highlight any major changes in your organization, your region, or the policy environment that have had or will have an impact on this project.

II. Progress on Outcomes and Milestones (Appendix A)

Use Appendix A to provide detail on progress against the outcomes and milestones you listed in your grant proposal. Complete the “Actual Progress or Completion” column for the current period and the “Anticipated Progress or Completion” column, if changed, for the upcoming period. Include one to two bullet points on your progress for each outcome, for each milestone, and for unexpected challenges to each outcome.

III. Implementation Successes

Choose one to three milestones or outcomes listed in Appendix A that you view as your greatest successes, and explain why. Include lessons learned that could benefit the field.

IV. Implementation Challenges and Risks

If applicable, discuss one to three unmet milestones or outcomes that had been anticipated for completion in this period. Explain the challenges that you encountered, and summarize the steps you’re taking to address or mitigate them for the future.

If, in your original proposal, you described significant implementation risks, describe how you are addressing them. Also describe any new risks and how you are addressing them.

V. Evaluation

Is this project being assessed by an evaluator (internal or external)? If so, and results are known, describe one to three key findings and how you have applied them to your work or how they have contributed to the field.

VI. Intellectual Property

Describe any third parties that have rights in project technology and materials. Tell us about any copyright registrations for work completed through this grant that you have filed or patent applications claiming any project technology.

VII. Organizational Capacity

If, in your original proposal, you described organizational changes required to successfully implement this project, describe the steps you took and assess their success. Describe any new issues or significant changes that have emerged in your organization.

VIII. Financial Report (budget template)

Complete the budget template provided with detailed financial information for the reporting period.

IX. Project Budget Narrative

Describe any significant variance (+/-10%) from your budget, and summarize why. If you raised additional funds for this project during this reporting period and this information is not captured in your financial report, list the funding sources, grant start/end dates, and amounts. If you have carryover, describe how you're recommending using it and how it will impact the project (need more time, etc.).

X. Sustainability Plans

What steps are you taking to ensure that your work, where appropriate, is sustainable (e.g., funding model improvements, advocacy, research and evidence, strategic partners or alliances)? If you created a sustainability plan at the time of your proposal, how are you progressing against those goals?

XI. Reports/Publications

List any reports or publications relevant to this project that have been released since the last reporting period. As applicable, describe how you have maximized data sharing and dissemination consistent with the charitable purposes of the project.

XII. Foundation Relationship

Reflect on what can be done differently to make the project and our partnership with you more successful.

XIII. Success Story (optional)

Share a student story, a client story, or an anecdote about an unanticipated success that resulted from the work of this grant.

Guided by the belief that every life has equal value, the Bill & Melinda Gates Foundation works to help all people lead healthy, productive lives. In developing countries, it focuses on improving people's health and giving them the chance to lift themselves out of hunger and extreme poverty. In the United States, it seeks to ensure that all people—especially those with the fewest resources—have access to the opportunities they need to succeed in school and life. Based in Seattle, Washington, the foundation is led by CEO Jeff Raikes and Co-chair William H. Gates Sr., under the direction of Bill and Melinda Gates and Warren Buffett.

For additional information on the Bill & Melinda Gates Foundation, please visit our web site: www.gatesfoundation.org.

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