



INTERIM REPORT

Date:

Name of Organization:

Fiscal Agent (if different from your organization):

Address:

Executive Director/President/CEO:

Contact person (if different than CEO):

Phone:

Fax:

Email:

Title:

Program Name (if applicable):

Program Partners (if applicable):

Grant Reference #:

Grant Amount:

Period that this report covers: ___/___ to ___/___

This report may be submitted in one of the following ways:

Mail: BCBSMA Foundation, 401 Park Drive, Boston, MA 02215, Attn: Interim Report

Fax: 617-246-3992

**GUIDE FOR INTERIM NARRATIVE AND FINANCIAL REPORTS
TO BLUE CROSS BLUE SHIELD OF MASSACHUSETTS FOUNDATION**

The narrative and financial sections of the interim report should not exceed two pages. You may attach press clips, brochures and other materials pertaining to the funded program.

- **Narrative Report** — List up to five accomplishments or progress towards meeting your stated goals and objectives so far. Have there been any delays in meeting objectives? If so, please explain them. If there is additional information you would like to provide — information about accomplishments not related to the stated goals and objectives — please include them at the end of the report.
- **Financial Report** — Display actual expenditures against the project budget. In addition, please list any other funding sources for this program, including the amount of the contribution made by each.

EXAMPLE: Financial Report

Other Funding Sources:		Income
Foundation X		\$10,000
Foundation Y		\$ 5,000
BCBSMA Foundation		\$10,000
ABC Office Supply Company		In-kind
General Support Funds		\$ 3,200
Total Income		\$33,200
Budget Category:	Budget with Proposal:	Actual Expenditures:
	\$25,000	\$26,000
Personnel	\$ 5,000	\$ 5,500
Telephone	\$ 2,000	In-kind
Supplies*		\$ 2,200
Communications**		
Total	\$32,000	\$33,200

In addition, a budget narrative should be included when there has been a significant shift in line items.

EXAMPLE: Budget Narrative

*Supplies — ABC Office Supply Company made an in-kind contribution that exceeded the project's supply needs.

**As we informed the Foundation on such and such date, a window of opportunity opened to reframe the date on this issue; hence, we hired a media consultant who helps us organize, prepare materials for and hold a press conference. As indicated in the narrative report, the press conference and its consequences were critical pieces in accomplishing our goals.