



HAWAII COMMUNITY FOUNDATION

**Nonprofit Excellence Program -  
Organizational Capacity Building  
Reporting Guidelines for  
Executive Transition**

**Overview**

Below are guidelines for the final report that you are required to submit. The guidelines are designed to give you an opportunity to convey the information and anecdotes which you feel best capture the work that was done during the grant period; and second, to allow us to report to various internal and external audiences about the work supported by this grant. The real value of these reports falls more on the side of *learning* than oversight. Your candor about what worked, and what didn't is what makes these reports useful as communication and evaluation tools.

**Final Reports**

Please use the following descriptive file name when uploading your files: Application ID\_Your Org Name\_Final Report (.pdf or .doc) (for example: '145\_HCF\_FinalReport.pdf').

Reports should answer the following questions:

1. Did you hire a new executive director? If you did, please describe the characteristics of the person you hired and what impact you believe s/he will have on the organization. Please submit the new executive director's resume or curriculum vitae. If you have not yet hired a new executive please describe where you are in the process and what the challenges have been.
2. Were there any key insights, successes, and/or challenges that the board or senior staff learned about your organization through this transition process?
3. Please include a financial report detailing actual expenditures compared against the original project budget.

**Grant Report Extensions**

We are often asked about extending the deadline for a grant report. We understand that projects sometimes take longer to implement than initially anticipated. To request a grant extension, please contact Ophelia Bitanga-Isreal at [obitanga-isreal@hcf-hawaii.org](mailto:obitanga-isreal@hcf-hawaii.org) in writing or by e-mail, include your grant ID#, and let them know: 1) why the extension is needed, and 2) when we can expect the final grant report. In most cases this will be all that we need to approve a grant extension.

Final reports are due by the date indicated on your original grant award letter.

Please submit your final reports via email to: [kabalos@hcf-hawaii.org](mailto:kabalos@hcf-hawaii.org)