



Athena Progressive Giving Circle Report of Grant Expenditures & Presentation Guidelines 2025-2026 Grant Cycle

Please note: Grantee must maintain the grant funds in a separate account on the grantee's books.

There are two grant expenditure reports required: an Interim Report due January 30, 2026, and a Final Report due July 15, 2026. A team member from your organization will also be expected to give an oral presentation at a future Athena Giving Circle member meeting. Your organization will receive an invitation to that meeting.

Interim Report of Grant Expenditure, Due January 30, 2026

Please include in the INTERIM report the following information in the format below, and submit it by email to lscott@cfsarasota.org

1. Organization name, contact person, address, phone number, and email address
2. Grant period and amount of grant
3. Grant title and purpose
4. A financial accounting of how the funds were expended to date
5. A brief summary of program activities that have taken place since the grant began
6. Evaluation – Please be as quantitative as possible
 - Describe the benefit to participants in the program/project to date, including specific progress against agreed program objectives.

Final Report of Grant Expenditure, Due July 15, 2026

Please include in the FINAL report the following information in the format below, and submit it by email to lscott@cfsarasota.org

1. Organization name, contact person, address, phone number, and email address
2. Grant period and amount awarded
3. Grant title and purpose
4. A financial accounting of how the funds were expended
5. A brief summary of program activities that took place during the grant period
6. Evaluation – Please be as quantitative as possible
 - Determine if the program met the expected results identified in the proposal
 - Describe the benefit to participants in the program/project
 - Describe any unanticipated effects/results of the program/project

Guidelines for Presentation

Please assume that your two reports regarding the grant have been read by all those present. We suggest that no more than two individuals from your organization be present to discuss this grant. Each organization will be given twenty (20) minutes to present and answer questions. Questions will come from any of the Athena members.

Athena is interested in:

1. The use of its grant, including any variations from planned use.
2. Any unusual outcomes or unexpected impacts from the grant.
3. How the program Athena funded will continue in the future.

You are welcome to use any electronic support materials during your presentation.

Publicity

In addition to these reporting requirements, we encourage you to share publicity generated by or for your organization about this award if applicable (newspaper or newsletter articles, photos, etc.) In advance of publication, please share press releases with the Community Foundation of Sarasota County via email at communication@cfsarasota.org.

If you have questions regarding these reporting requirements, which differ from other Community Foundation grant reports, please contact Laurie Scott, Philanthropic Advisor, at 941-556-7155, or by email, lscott@cfsarasota.org.