



Reporting Guidelines for Endowment Grants

I) Organizational Update (required by all)

Please report on the following:

- ◆ Accomplishments and setbacks
- ◆ Any significant changes at your organization
- ◆ Goals and objectives over the next 3-5 years

II) Financial Information

A) Institutional Endowment (required by all)

- ◆ Most recent market value (please include the date of the valuation)
- ◆ Current investment policy (as an attachment)
- ◆ Current payout policy

B) Hearst Fund

- ◆ Most recent market value (please include the date of the valuation)
- ◆ Additional donors to the Hearst Fund, if applicable. Please include a list showing the date, donor and amount of the contribution(s).

III) If your organization has a William Randolph Hearst Endowed Fund for Programming, please provide the following information.

A) For the *current fiscal year*, please provide the following:

- ◆ Description of the program(s) supported by the Hearst Fund, including goals, achievements, challenges and future plans
- ◆ How you measured the effectiveness of your activities; what you learned; and how you used or will use this information
- ◆ Amount generated by the Hearst Fund and used for the designated program(s)

B) Please specify the total amount provided by the Hearst Fund since it was established to support the designated program(s)

IV) If your organization has a William Randolph Hearst Endowed Scholarship Fund, please provide the following information.

A) For the *most recent academic year* (please indicate the year), provide the following:

- ◆ The number of students and scholarships, and the dollar amount of each scholarship awarded from the Fund
- ◆ Names and brief biographical information on each Hearst scholar
- ◆ Description of the selection process

B) Provide the following information about the Fund since inception:

- ◆ Total number of students supported

- ◆ Total number of scholarships
- ◆ Total amount awarded

V) If your organization has received an endowment grant toward the institution's endowment, please provide the following information.

For the current fiscal year:

- ◆ Description of the program(s) supported by the endowment fund, including goals, achievements, challenges and future plans
- ◆ How you measured the effectiveness of your activities; what you learned; and how you used or will use this information
- ◆ Amount generated by the endowment fund and used for the designated program(s)

VI) Attachments

- ◆ Organization's audited financial statements for the year in which the grant was used (*uploaded*)
- ◆ Correspondence from scholarship recipients, if applicable (*upload as one document*)
- ◆ Current Investment Policy (upload as one document)