Wisconsin Partnership Program
Policy on Review of Grantee Interim Progress and Final Reports

BACKGROUND
The Memorandum of Understanding and Grant Agreement between the grantee and the Wisconsin Partnership Program (WPP) requires annual interim progress reports throughout the period of agreement (i.e., grant period) and a final report at the end of the project.

DEFINITIONS

Interim progress report: Provides written documentation from the grantee on the current status of the grant, referencing progress toward the specific goals and objectives, with a focus on accomplishments to-date and lessons learned.

Final report: Provides written documentation from the grantee on the work completed during the grant period and the outcomes and accomplishments with reference to the specific goals and objectives.

Outcome report: Highlights the overall accomplishments, key findings, impact and sustainability of the project. The outcome reports, prepared by the WPP communications specialist and reviewed and approved by the grantee, are published in conjunction with the annual report and are made available to the UW System Board of Regents and the general public.

POLICY
Throughout the grant period, written annual interim progress reports are typically due no later than thirty days after the end of each twelve-month period based on the start date of the agreement. A final report is typically due no later than ninety days after the end of the project. The interim progress and final reports include a nonsupplanting questionnaire. For grant awards by the Partnership Education and Research Committee (PERC), the interim progress reports and the final report include a financial status report. For grant awards by the Oversight and Advisory Committee (OAC), financial status reports are submitted at least quarterly during the grant period.

PROCEDURE
WPP staff receive a monthly report listing interim progress and final reports submitted or overdue. If overdue, the grantee is contacted by the Program Officer or Administrative Manager to ensure timely submission. If necessary, the WPP Director is notified and advises on next steps.

PERC Grant Awards
Interim progress reports and final reports for PERC grant awards undergo a technical review by the Administrative Manager, Assistant Director for Finance and the Grants Specialist before being assigned to two PERC members with relevant expertise for a content review. Assigned reviewers complete a review form that is shared with the full committee along with the report. Any questions or concerns regarding the content of the report are brought to the PERC for discussion. The PERC may ask a Principal Investigator to provide additional information to the committee in writing or in person or to resubmit the report. If there are no concerns, the report is placed on PERC’s consent agenda for acceptance.

The Principal Investigator will typically make up to two presentations to the committee, a progress report presentation mid-way through the grant period and a final report presentation after the project ends.
OAC Grant Awards
Interim progress and final reports for all OAC grant awards undergo a technical and content review by the Program Officer, Assistant Director for Finance and the Grants Specialist. The Program Officer completes a review form. Any questions or concerns regarding the content of the report may be brought to the OAC for discussion, if deemed appropriate or necessary by the Program Officer or the WPP finance team. The Program Officer may ask a grantee to provide additional information or to resubmit the report.

Relationship building with grantees is a critical component of understanding the funded work and achievement of outcomes. Therefore, program officers will connect with grantees multiple times per year. Informally, this includes phone calls and either in-person or remote (Zoom) meetings. Formally, this includes participation in annual Learning Collaborative events.

The community grantee will typically make one presentation to the committee during the grant period, either a progress report presentation during the grant period or a final report presentation after the project ends.