**Challenge Report**

Grant recipients may request up to two payments each grant year – one progress payment and one final payment. For each payment, we ask that you submit a Challenge Report through our [grant portal](https://circleofservice.us-1.smartsimple.com/s_Login.jsp). For your convenience the Challenge Report questions can be found below so you can work on them offline and/or share them with members of your team that do not have access to the grant portal.

If you have any questions about reporting and/or specific questions about what counts toward the challenge grant, please refer to Grant Agreement and the [Eligible Gifts](https://www.cosfoundation.org/faqs/challenge-grants-faqs/) section of our website. If your question is not addressed in either place, please us at [grantsmanagement@cosfoundation.org](mailto:grantsmanagement@cosfoundation.org).

**Grant Information**

Name of organization

Purpose of grant

Grant ID

**PROGRAM UPDATE**

**Program Goals Progress**

Did you meet or are you on track to meet the programmatic goals and outcomes stated in your proposal?

* On track to meet stated goals and outcomes
* Not on track to meet stated goals and outcomes

If you are not on track to meet your projected goals and outcomes, please elaborate on why you are not on track.

**Organization and Program Changes**

Were there any material changes to the organization and/or funded program(s), including but not limited to, changes in the scope of the program, timeline, budget or staffing?

* There have been no material changes
* There have been material changes

If there were material changes to the organization and/or funded program(s), or if you anticipate material changes, please elaborate.

**Fundraising Update**

**Difficulty**

On a scale of 1 to 10, please rate the difficulty of meeting this challenge. (1 = easy and 10 = impossible)

If applicable, what made meeting this challenge grant difficult?

**Impact**

On a sale of 1 to 10, please rate the impact this challenge grant had on your fundraising. (1 = no impact and 10 = extremely high impact)

(OPTIONAL) Please share any comments you have on the impact this challenge grant has made on your fundraising.

**Payment Update**

**Payment Type**

Select the appropriate payment type based on the following:

* If you are not requesting the full amount, select Partial Payment.
* If you are requesting the full amount, select Full Payment.
* If you had previously asked for partial payment and are now asking for the final payment select Final Payment.
* Partial Payment
* Full Payment
* Final Payment

**Payment Method**

Please select a payment method. **COSF strongly prefers to issue payment by ACH** but can have checks issued if needed. If you select Check and we have paid you by ACH before, we will follow-up with you to determine why ACH is no longer a viable option.

* ACH
* Check

**Attachments**

Your Challenge Report is not complete until you upload the items described below. This can be done by uploading a single file that includes all the items described below or separate files.

PLEASE NOTE: We prefer documents created in Excel, Word or PDF.

* **Challenge Report List**: Please submit a list of the donations that you are asking us to match. You may use our [Challenge Report Spreadsheet template](http://www.cosfoundation.org/resources/). You are not required to use our template, but if you use a different form, please ensure that it includes all of the information requested on our template.
* **Challenge Report Statement**: Please include a statement signed by an executive staff member and an officer of your board attesting that the donations listed are accurate and are qualifying donations as described in the COSF grant terms. This statement may be included on the list of donations (it is included in the Challenge Report Spreadsheet template.) or may be included in a separate letter.

PLEASE NOTE: We require two separate signatures. For example, if your executive staff signer is also a board officer, we still need an additional signature.

* **Other Confirmation**: If you have specific challenge grant criteria (such as a board giving requirement, hire confirmation, or budget finalization) stated in your grant terms, please include a second statement, also signed by your executive director and an officer of your board, attesting you have met those challenge grant criteria as described in the COSF grant terms. The statement may be included on the list of donations, directly beneath the statement described above, or it may be included in a separate letter.
* **Other**: You may use “Other” to upload any item your program officer may have requested, such as an updated budget or updated outcomes chart. You may also use “Other” to upload any items that you would like to share with us, such as your latest annual report, a sample fundraising letter you used, or your most recent audit. PLEASE NOTE: This is not required unless your program officer or grant agreement specifically instructs you to include this. "

If Section 2 of your grant agreement is labeled “Payment Conditions,” please include a second statement, also signed by your executive director and an officer of your board, attesting you have met those challenge grant criteria as described in the COSF grant terms. The statement may be included on the list of donations, directly beneath the statement described in section 10, or it may be included in a separate letter.