

Template for TA Narrative Report

Section 1. Quantitative Analysis of Milestones

	Quarterly Milestones	Quarterly Actual	Yearly Milestones	Yearly Actual	Milestone Achieved?
# of Clients Receiving Loans					
Total Classroom Hours					
Total Individual Counseling					
Total TA Hours					
Average TA hours per Loan					
# of Clients Not Receiving Loans					
Total Classroom Hours					
Total Individual Counseling					
Total TA Hours					
Average TA Hours per client					
(Including new and Existing Clients)					
Total Number of Clients Counseled					
Total Classroom Hours					
Total Individual Counseling					
Total TA Hours Provided					
Other Milestones (List Separately)					

Section 2. Narrative Analysis of Milestones

Provide a narrative of accomplishments.

Provide a narrative of milestones not achieved and explanation as to why the milestone was not achieved.

Provide a narrative of plans to meet milestones in the future.

Section 3. Quantitative Analysis of budget expenditures

	Projected Annual Expenditure	Actual Annual Expenditure YTD	Percent of Projected Expenditure
Personnel Services			
Fringe Benefits			
Travel			
Equipment			
Supplies			
Contractual			
Other			
Total Direct Costs			
Total Indirect Costs			
Other			

Section 4. Narrative of Budget Expenditures