



Grant Reporting Basics

1. Grant Report Functions (primarily private funders like foundations)

- a) Evaluative (ensures accountability) – reports serve as a programmatic and fiscal accounting of how funds were used, usually in comparison to goals, objectives and budget proposed in the original grant application.
- b) Acknowledgement (builds relationship) – reports serve as a thank-you to the grantor.

2. Importance of Grant Reporting

- a) Reports assist in ensuring renewal of funding from year to year
- b) Midterm and quarterly reports often prompt grant check payments
- c) Past and current grantors serve as organizational “character” references
- d) Reports provide internal documentation of program activity

3. Frequency of Reports

- a) Weekly
- b) Monthly
- c) Quarterly
- d) Mid-term / Six Month
- e) Annual / Final

4. Reporting Basics (what is included in reports)

- a) Process reporting (number of clients served, frequency of service, etc.)
- b) Outcome reporting (improved grades, increased skill levels, etc.)
- c) Impact reporting (lower substance abuse in city, less crime in county)
- d) Implementation reporting (organizational move, staff turnover, etc.)
- e) Reflective reporting (barriers and challenges, lessons learned, etc.)
- f) Fiscal reporting (how we spent money, other sources of revenue, etc.)
- g) Other (samples of materials, newsletters, fliers, site visits/reviews, photos, copies of program publicity, etc.)

5. Reporting Tools (how to collect the information needed for reports)

- a) Sign-in sheets, activity logs, etc.

- b) Pre and post activity surveys
- c) Staff observation
- d) Client self-reports
- e) Secondary information (report cards, attendance records, etc.)
- f) Case management files
- g) Internal database information systems

6. Where to Start (before you write)?

- a) Read report from last period
- b) Read original grant proposal
- c) Review grantor report format and reporting requirements; confirm and/or obtain this information if not in possession

7. Things to Remember

- a) Timeliness: make the deadline, ideally with breathing room
- b) Accuracy: double check numbers and other information
- c) Consistency: ensure report is consistent with earlier reports and original proposal
- d) Thoroughness: answer all the questions requested
- e) Be descriptive, be specific: when reporting on percentage of a goal achieved, remember to include the numbers used to calculate percentages – for example: *75% of clients served (15 out of 20) reported improvement in relationships with peers*
- f) Avoid internal distinctions or lingo

8. Troubleshooting

- a) What if we are “under-performing” or not meeting our goals/objectives?
 - *Discuss early in grant period so solutions can be initiated before end of the grant term; sometimes it is possible to request a reworking of goals and objectives*
- b) What if goals were poorly written, vague, hard to understand in first place?
 - *Report the best you can using information and data that capture the intent of the grant, with eye on rewriting goals in future*
- c) What if I’m going to miss a deadline or forgot about a report?
 - *Bring to the attention of agency leadership as soon as possible, so it can be explained to the grantor, often an extension on the deadline can be secured if requested*

9. Final Thoughts

- Be forthcoming and try to have fun – your reading audience will be other busy people just like you, and they will appreciate frankness and the tone levity can inspire
- It is much easier to maintain and renew an existing grant, than it is to apply and secure a new source of funding