

# *Grant Reports: What We Learned in 2015*

CAF America Blog

One of the most rewarding experiences as a grantmaker is receiving and reviewing reports on projects and programs that were directly impacted by your grant. Grantee reports are a wonderful opportunity for charitable organizations to continue building a sense of trust with their donors, to celebrate the successes of their efforts, and to reflect on any mistakes made, with the ultimate goal of applying changes or improvements to their future activities. However, these opportunities can be easily missed when certain 'best practices' aren't followed or when the report is not completed properly.

Looking back on 2015, with over 2,748 international grants processed throughout the year, CAF America noticed several recurring challenges faced by both donors and charitable organizations when it comes to grant reporting. Below are some of the most commonly noted challenges in grantee reporting and our take on how to overcome them.

## **The information provided does not fully address the reporting requirements.**

Each donor or grantmaker will have reporting requirements. This is actually good news! The reporting requirements, if followed carefully, will serve as a roadmap to a successful reporting process. Grant recipients should always address the specifics outlined by the grant report questions, and refer to any notes related to reporting within the grant agreement while compiling their report.

If the requirements are unclear, do not be afraid to communicate with your donor. Our experience shows that donors would rather respond to follow up questions in the preparatory phase, if these facilitate the receipt of a complete report. The donor will be able to provide additional insight on the aspects that have the most relevance from their perspective. Such clarifications will enable you to provide a satisfactory report that addresses their goals as well as your own.

Some examples of reporting requirements refer to budget details, quantifiable improvements and /or impact, specific accomplishments or program milestones. To ensure a better understanding of the progress made, it is helpful to explain how your organization measures success: whether you set any benchmarks internally; what are

these; how do you monitor developments and so on. It might also be beneficial to illustrate the impact of your programs on a particular beneficiary to provide context behind your findings.

Example: Some of the most informative reports that we receive are set up in a goal/outcome structure. The charity presents the priorities included in their grant application and then includes the outcome of those priorities and how its success was measured. This may seem like a simple format, but it is an effective way to provide the most important information to the donor.

**The report is too general and does not properly highlight the specifics of the project supported by the grant.**

One of the many challenges of completing a grant report is effectively sharing the information that you're aiming to relay without becoming too general. All too often, donors receive annual or general program reports instead of detailed reports on how the specific grant was applied toward a project. Grant reports should be fairly brief, but informative and specific. Consider the questions that you are being asked and prepare a concise report that answers these, while still highlighting your successes.

Our advice is to use the reporting requirement as an opportunity to appeal to your donors' hearts and to give them peace of mind that their donation was used towards making the difference to which they aspired. Should you successfully accomplish these two goals, you may have a better chance to secure further support from your donor. A great example of this might be a brief story outlining some background information about a beneficiary or a specific aspect of your program that connects your donors to your work. Pictures and videos are welcomed additions to any grant report!

Example: One of the most successful reports received by CAF America was also one of the most simple. The grant's purpose was to support the development of a food bank in South America. The report effectively depicted the impact of the grant received through our organization by displaying a clear timeline of the progress made.

Divided in various phases, the report started with an empty, unfinished space and showed the progression of the food bank until completion, highlighting the materials added to the space and purchased through the grant received. The final picture exhibits a fully functioning food bank and highlights the key features of the project that were funded by the grant. While the timeline and report was simple, it effectively connected the grant to a significant development in their food bank operations.

**The report was not submitted in a timely manner.**

A report should always be provided to the grantmaker, regardless of whether it is required. If a report is required, it is best to ensure that it is submitted before the deadline. Set intermittent reminders for yourself to begin collecting any information that will be pertinent to the report – this will give you plenty of time to put together a comprehensive and meaningful report without feeling rushed before the deadline. Some long-term projects may not be complete before a report is due. If your project or program is ongoing, our suggestion is to still provide a progress report that details how the grant has impacted the momentum of the project, while also briefly outlining your organization's plans for the use of the remaining grant funds (if this is allowed within your grant agreement). On the other hand, if you know that your report is likely to be late, it's best to notify your donor and maintain an open line of communication. Avoiding these pitfalls will definitely help with your grant reporting process, and with the few extra tips below you should be on the right path for being recognized by your donors for your effective reporting!

### **Highlight lessons learned.**

Most programs are a learning process for the beneficiaries of charitable activities, the organizations designing and implementing the programs, as well as for the donors who made them possible. While your report serves to highlight your successes and build the confidence of your donors, it is also an opportunity for you to present possible improvements or changes that you aim to implement as a result of that learning process. If you are hoping to receive continued support, this helps to reinforce your dedication to the consistent advancement of your work that cannot be accomplished without the support of your donors.

### **Be prepared to answer questions.**

Submitting your report may not always conclude the reporting cycle. Your donors may have follow up questions related to the material you have just submitted. Be sure to include all of your contact information with your report and invite your donors to reach out to you should they need any clarifications. Your attentiveness to the full cycle of the grant will undoubtedly be appreciated and it allows you a final opportunity to ensure that your report achieves its maximum impact. We hope that sharing our lessons learned prove to be useful to you and we wish you happy reporting!