POST-GRANT REPORTS, MONITORING, AND MORE

SEPTEMBER 2016
AGENDA

• Introductions

• Discussion + Perceptions

• Pyramid of Reporting + Limitations

• Getting the “Right” Answers Means Asking the Right Questions Work Session

• Top 5 “Tips and Tricks”
DISCUSSION QUESTION:

Does your foundation require grant reports?

If so, why? In what format?
DISCUSSION QUESTION:

What are your biggest frustrations surrounding the grant reporting/evaluation process?
“Final reports are the worst. They are often too detailed relative to the project or ask for information that is not relevant to our project.”
“I really think the meaningful application and reporting process is an objective of funders, not nonprofits. The process is a means to an end for us, and there’s little that is going to make that more meaningful than just having time and money to focus on the work that drives impact.”
“When the grant award is so very small (>\$10k) and is for general operating, it seems silly to have to report where we allocated the money.”
I can’t ever remember a time when a funder acknowledged that they received and read our grant report and provided any feedback.

It’s like submitting an end-of-semester paper: you never hear anything back or get any feedback...eventually, you just get a grade.

-Paraphrase
I don’t think we’ve ever heard back after submitting a grant report.

I don’t think program officers really read them.

-Paraphrase
It’s frustrating when a foundation doesn’t seem to read the reports they require. It is helpful to receive back an acknowledgement that conveys the funder has read the report, asks any further questions, etc. Otherwise we’re in limbo about how the foundation feels until the next time we apply. -Paraphrase
• Review original grant
• Collect & compile data
• Coordinate with accounting
• Write report

½ respondents = 15 hrs+
DISCUSSION QUESTION:

What does your foundation do with grant reports?
REPORTING PYRAMID
Effective Philanthropy—Bearman Reporting Pyramid

Build the field: How does what we’ve learned contribute to field knowledge?

Influence overall funding strategy: How do results across reports inform our funding strategy?

Share with board and staff for internal learning: What did this grant accomplish? What stories can we share?

Build grantee learning & capacity: How can I help this grantee (or set of grantees) be most effective?

Affect future funding for individual organization: Do we want to invest in this organization going forward?

Monitor for accountability: Were our funds used as intended?
DISCUSSION QUESTION:

Which layers does your foundation use (either formally or informally)?
DISCUSSION QUESTION:

How has your foundation used reports/other evaluations to help with some of the higher levels of the pyramid?
LIMITATIONS OF FINAL REPORTS
• Vested interest
• Hard to capture impact
• Word/page limits

Remember:
WORK SESSION
DISCUSSION QUESTION:

What questions do you ask on your grant reports that are most helpful? Least helpful?
DISCUSSION QUESTION:

What questions do other foundations ask that you find intriguing?
EXAMPLES:

- Describe any additional funding secured, collaborations created, or partnerships developed since this grant was awarded.

- What have you learned about your clients, community, or issue you are addressing through this project? How will this information affect the way you accomplish your work in the future?

- What are the concrete strategies or specific plans for continuing and funding the work started or affected by this grant?

- Please provide feedback about our proposal and evaluation process. For example: did you receive a fair return on your investment of time, were our communications clear?
5 “BEST” PRACTICES
#1 "BEST" PRACTICE

At a minimum...

acknowledge report has been received and read
#2 “BEST” PRACTICE

Streamline by asking:

- Why do we require this? Who will use this information and what for?

- Do we need it from everyone all the time...or just some organizations some of the time?

- What are other ways we can get this information beyond the standard narrative report?
#3 “BEST” PRACTICE

Be clear up front about expectations...and be consistent!
#4 “BEST” PRACTICE

Written reports can never replace relationships
#5 “BEST” PRACTICE

Use reports! Just start somewhere!

- Talk with grantees after report is submitted to ask questions, make connections, offer ideas
- Pull highlights for board members
- Discuss what you’ve learned with other funders
- Incorporate past grant information into grant review process