



Understanding Reporting Requirements

Managing Grants Post-Award

Learning Objectives

- Recognize the typical sections funders require in reports
- Develop strategies to produce consistent, timely reporting
- Tailor communication to maintain positive funder relationships
- Identify how strong reports support future funding prospects

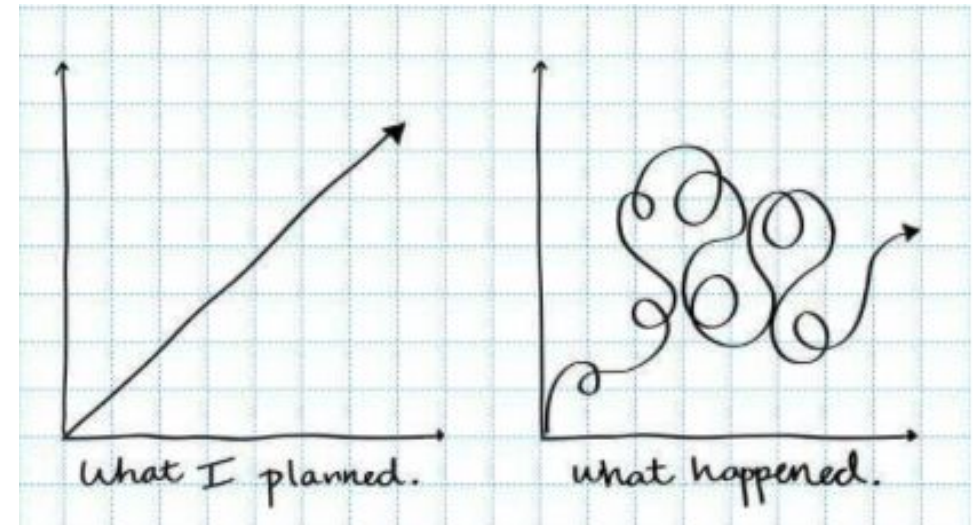
Common Financial Reporting Requirements

- Show budget vs. actual expenditures to highlight variances
- Include categorized spending (personnel, travel, equipment, etc.)
- Maintain receipts or invoices for audit readiness
- Document any matching funds or in-kind contributions
- Use standard accounting principles where required

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Common Programmatic Reporting Requirements

- Track progress on goals or milestones (*e.g., number of participants served*)
- Compare planned activities to completed actions
- Showcase outcomes and impacts with supporting evidence
- Share anecdotal stories or testimonials for qualitative insight
- Address challenges or shifts in the project plan



Aligning with Funder Requirements

- Adjust the format or structure based on each funder's guidelines
- Use the specific metrics or vocabulary the funder requests
- Reference the original proposal sections to show continuity
- Incorporate required attachments or supplementary materials
- Submit on the specified schedule or platform



Scheduling and Organization

- Use calendars or software to track deadlines and internal checkpoints
- Delegate tasks for data collection and drafting to relevant team members
- Maintain a central folder for all relevant documents
- Create reminders or automated alerts to prevent missed deadlines
- Conduct a final review at least a week before the report is due



Reflection Slide

- Recall a recent experience with grant reporting
- Think about a time your team struggled with deadlines or formatting
- Consider unexpected funder requirements that caused confusion
- Share a lesson learned that improved your next reporting cycle
- Think of an instance when the project scope or budget changed
- Recall how you relayed this to your funder and what their response was

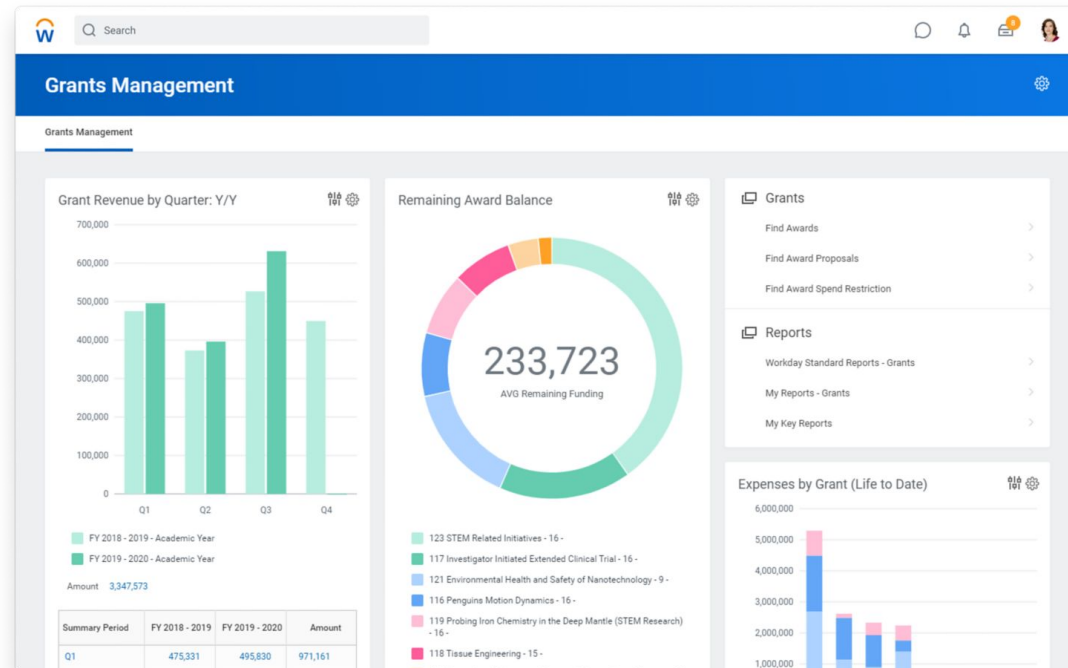
Communication with Funders

- Provide brief updates between major deadlines to stay top-of-mind
- Proactively discuss emerging problems or budget variances
- Invite funders to events or milestones for firsthand observations
- Show appreciation for their support through newsletters or social media
- Encourage two-way dialogue to build trust and partnership



Tools and Best Practices

- Consider using grant management software to streamline reporting
- Develop standardized templates across different projects
- Employ data visualization to simplify complex information
- Keep detailed logs of staff hours or volunteer efforts
- Run periodic internal mini-audits to confirm data accuracy



Potential Pitfalls

- Missing deadlines or submitting partial information
- Underreporting expenses or project complexities
- Overwhelming funders with irrelevant details
- Failing to link financial data to program outcomes
- Overlooking new compliance rules or updated guidelines



Key Takeaways & Next Steps

- Align reports precisely with funder formats and expectations
- Maintain thorough financial documentation and clear program outcomes
- Communicate often to strengthen trust and address issues early
- Stay organized through consistent scheduling and data oversight
- Recognize that robust reporting opens doors to future grant support
- Collaborate with colleagues to streamline data collection and analysis