Grant Managers
Brown Bag

# GRANT REPORTING: TELLING YOUR STORY

NOVEMBER 2022

# WHY REPORTING?

- All grants require some kind of report

- While not a grant, it is grant-like

- Future funding depends on good project reporting

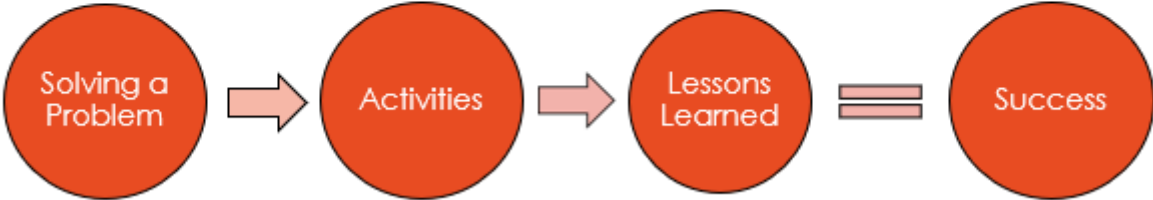- Reporting is a core responsibility of the Grant Manager



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# WHY REPORTING?

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Reports serve multiple purposes:

Progress

Impact

Reports

Challenges

Financial

# TWO TYPES OF REPORTING

## NARRATIVE REPORT

## FINANCIAL REPORT

**TREEHOUSE**

STATEMENT OF FUNCTIONAL EXPENSES
For the Year Ended September 30, 2015
(With Comparative Totals for 2014)

| | | Program Services | | | Support Services | | Totals | |
| | Education Programs | Enrichment Programs Wearhouse | Other | Total Program Services | Management and General | Fundraising | 2015 | 2014 |
|---|---|---|---|---|---|---|---|---|
| Payroll | $ 2,961,283 | $ 254,559 | $ 297,039 | $ 3,512,881 | $ 207,608 | $ 803,007 | $ 4,523,496 | $ 3,808,143 |
| Wearhouse distributions | | 1,105,563 | | 1,105,563 | | | 1,105,563 | 1,039,882 |
| Payroll taxes and benefits | 661,899 | 67,702 | 72,198 | 801,799 | 42,373 | 170,827 | 1,014,999 | 891,310 |
| Occupancy | 108,936 | 199,366 | 16,936 | 325,238 | 61,628 | 32,374 | 419,240 | 406,863 |
| Assistance to specific individuals | | | 412,720 | 412,720 | | | 412,720 | 378,059 |
| Holiday Magic purchases | | | 343,792 | 343,792 | | | 343,792 | 333,673 |
| Other in-kind expenses | 7,327 | 162,330 | 92,633 | 262,290 | 1,617 | 20,416 | 284,323 | 238,829 |
| Professional services | 132,687 | 5,825 | 20,409 | 158,921 | 44,960 | 34,593 | 238,474 | 197,606 |
| Licenses and fees | 48,231 | 4,003 | 7,246 | 59,480 | 14,251 | 28,286 | 102,017 | 81,124 |
| Postage and shipping | 2,221 | 180 | 41,095 | 43,496 | 825 | 55,947 | 100,268 | 80,075 |
| Transportation | 83,262 | 1,968 | 1,423 | 86,653 | 849 | 5,337 | 92,839 | 78,855 |
| Printing and publications | 4,759 | 497 | 12,048 | 17,304 | 2,429 | 70,910 | 90,643 | 88,495 |
| Special events | | | | | | 87,260 | 87,260 | 172,958 |
| Supplies | 46,258 | 6,392 | 5,184 | 57,834 | 8,181 | 7,325 | 73,340 | 53,170 |
| Staff training | 54,806 | 2,163 | 962 | 57,931 | 7,591 | 6,339 | 71,861 | 62,062 |
| Telephone | 37,136 | 1,367 | 426 | 38,929 | 7,180 | 6,222 | 52,331 | 51,611 |
| Meetings | 17,402 | 920 | 1,356 | 19,678 | 6,104 | 21,951 | 47,733 | 36,424 |
| Credit card fees | | | 744 | 744 | | 38,710 | 39,454 | 42,588 |
| Equipment leases | 8,306 | 1,250 | 991 | 10,547 | 6,925 | 2,670 | 20,142 | 15,297 |
| Insurance | 7,281 | 783 | 869 | 8,933 | 6,070 | 2,341 | 17,344 | 24,304 |
| Depreciation | 83,444 | 8,973 | 9,959 | 102,376 | 69,571 | 26,828 | 198,775 | 62,914 |
| Other | 15,972 | 1,943 | 2,603 | 20,518 | 7,779 | 16,687 | 44,984 | 46,159 |
| Total expenses - 2015 | $ 4,281,210 | $ 1,825,784 | $ 1,340,633 | $ 7,447,627 | $ 495,941 | $ 1,438,030 | $ 9,381,598 | |
| Percent of total - 2015 | 46% | 20% | 14% | 80% | 5% | 15% | 100% | |
| Total expenses - 2014 | $ 3,605,605 | $ 1,701,631 | $ 1,252,862 | $ 6,560,098 | $ 391,208 | $ 1,239,095 | | $ 8,190,401 |
| Percent of total - 2014 | 44% | 21% | 15% | 80% | 5% | 15% | | 100% |

See Notes to Financial Statements

# NARRATIVE REPORT

Typical Report Outline

- ✓ Summary Statement

- ✓ Progress toward Objectives/Outcomes

- ✓ Challenges/Changes to Implementation Plan

- ✓ Strategy for Overcoming Challenges

- ✓ Leveraged Resources

- ✓ Success Stories/Unexpected Outcomes and Successes

# NARRATIVE REPORT

A Grant Report should:

1) Document that substantial progress has been made

2) Include facts and examples

3) Be concise

4) Be written professionally

5) Reflect the reporting period

6) Submitted on time



Storyteller

Audience
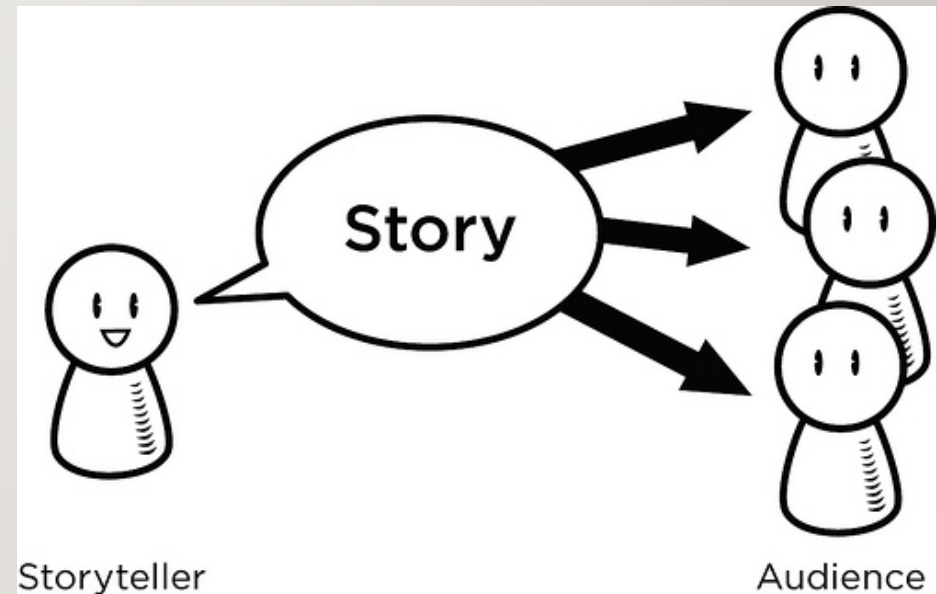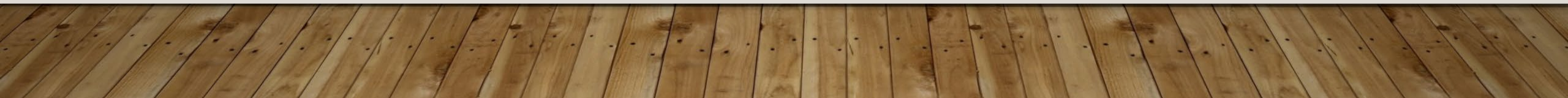
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# NARRATIVE REPORT

A Grant Report should not:

- Include activities not included in the Scope of Work unless they are supplemental or leveraged resources

- Air the college or district's dirty laundry

- Include changes to the grant that require prior approval unless already requested elsewhere

- Lead to more questions

# NARRATIVE REPORT

Areas that cause the most headache

- Outlining Substantial Progress

- Documenting Program Impact, including Outcome Reporting

# NARRATIVE REPORT

Outlining Substantial Progress

1) Note progress toward each activity

2) Reference Project Work Plan

3) Should review the work plan at least quarterly

# NARRATIVE REPORT

## Documenting Program Impact

- What has changed as a result of grant

- How have the intended recipients benefitted from the grant
    - Students
    - Faculty
    - Programs
    - Colleges/District
    - Community
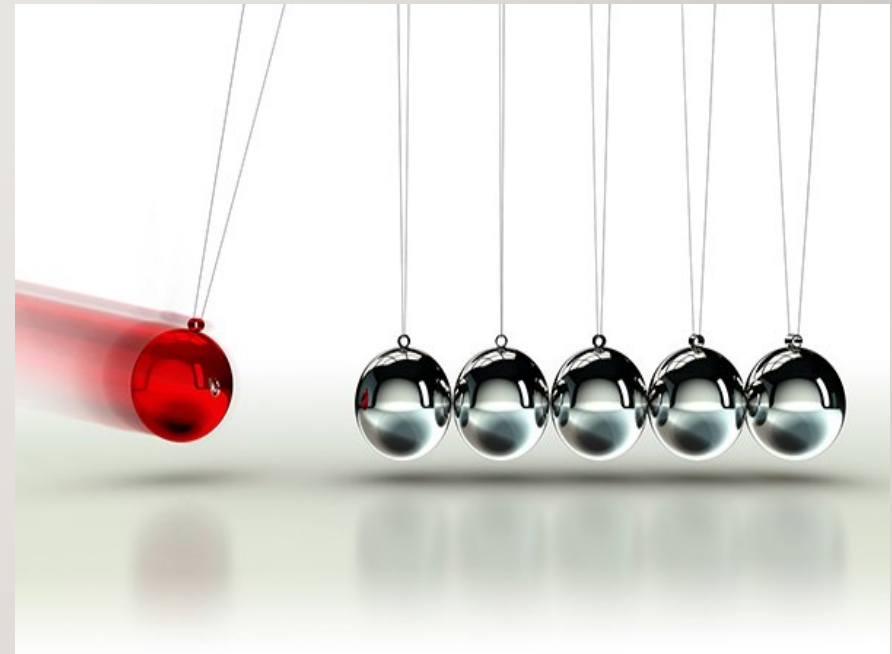
# NARRATIVE REPORT

Documenting Program Impact

- Reference purpose of grant, such as
  - Build capacity
  - Improve student success
  - Strengthen learning environment
- Include Outputs and Outcomes
  - Outputs indicate what was done
  - Outcomes measure how outputs changed the baseline
- Use data to document impact

# NARRATIVE REPORT

## QUANTITATIVE DATA

- Great way to tell the story with facts

- Can be measured

- Examples include:

  - Output: Number of students who attended

  - Outcome: Percentage of students who demonstrated a change in attitude as a result of attendance

## QUALITATIVE DATA

- Great way to tell the story around program successes and accomplishments

- Anecdotal rather than factual

- Examples include:

  - Student success stories

  - Photos and videos

  - Responses to Satisfaction Surveys

# NARRATIVE REPORTING

The Challenge of Impact Reporting

- Need to plan ahead

- Identify strategies for collecting the information
    - Database development
    - Surveys
    - Coordination with IE/IR Office

- May need to contract with an evaluator

- Difficult to report on impact at the last minute



## Assessment

is ongoing
is positive
is individualized
provides feedback

**Both**
require criteria
use measures
are evidence
driven

## Evaluation

provides closure
is judgmental
is applied against
standards
shows shortfalls
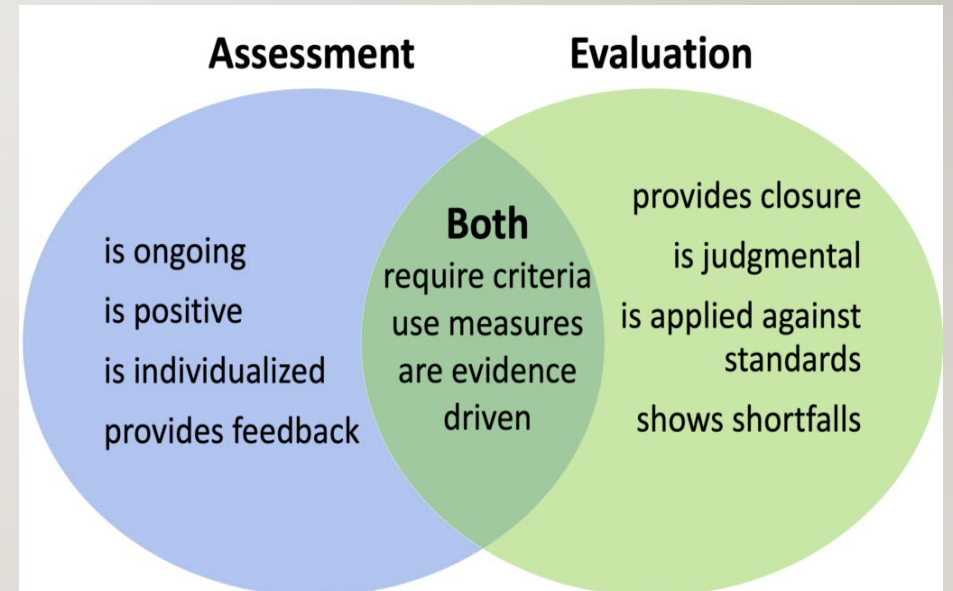
# FINANCIAL REPORTS

- Tells the story in numbers

- Documents how funding was spent

- Addresses issues of compliance and fidelity with grant award requirements

- Used to substantiate "substantial progress"

# FINANCIAL REPORTS

How To:

1) Report only allowable costs

2) Have documentation on file for all expenses charged to grant and included in report

3) Confirm numbers with Business Services

4) Secure signature of CBO or designee if signature is necessary

# FINANCIAL REPORT

Where the headaches arise:

- Galaxy may not be accurate
  - May not be possible that report matches the numbers in Galaxy
  - Manual changes to Galaxy may be necessary

# GRANT REPORTING

Best Practices

- Develop a good relationship with your program officer

- Communicate with the program officer regularly

- Reconcile grant budget monthly

- Review work plan at least quarterly

- Identify the evaluation plan at the beginning

- Ask for help

# HOW CAN GRANTS & SPONSORED PROGRAMS ASSIST

- District Grants
  - Brainstorm strategies to assess and evaluate impact
  - Assist with identification/selection project evaluator
  - Review and edit narrative reports
  - Meet quarterly to monitor fiscal spending
  - Prepare financial reports
  - Secure authorizing or certifying signatures

- College Grants
  - Provide technical assistance upon request
  - Connect grant managers with others within college who may assist
  - Review and edit narrative reports
  - Secure authorizing or certifying signatures from district personnel

# QUESTIONS