

Reporting 101

If you're running a department, an organization, or even a volunteer project with two or more people, you want to keep the project or business moving forward by having everyone "on the same page." You want to make sure you're going in the right direction, and you want to document your successes and challenges... or at least your boss or clients want them documented. There are lots of different kinds of reports used internally, but we'll brush over those high-level and focus on fundraising reporting.

So, internally, you'll primarily have financial & project reporting, internal communications (HR policies, employee news, etc), Board reporting, and all the informal communication that has to go on among colleagues and across departments, to make sure an organization is run well. The frequency and detail of reporting/review increase *down* the hierarchy, or the closer you are to the front line. So, the program manager should review their budget-to-actual report weekly, and identify (and be prepared to explain) any apparent over-spends or under-spends -- perhaps your program has a cycle, perhaps you bought a machine and spent money training workers and now you turn out many more widgets per day (ie an investment), or perhaps you are mismanaging the money, either by not taking advantage of opportunities or by spending without sufficient thought. In any case, the program manager wants to stay on top of their budget reports. The Program director may review the budget-to-actuals monthly, and the Senior leadership team may review (rolled up) budget-to-actuals every quarter (or more frequently if there are issues). You also want to review your program's productivity, with similar frequency - how many widgets did your team make, or how many interviews did you conduct, how many kids applied to college and got funding, in other words, are you actually achieving your stated goals?

Other internal communications? a monthly newsletter on personnel news, IT updates, any changes to HR policies, and announcements of your organizations successes... and challenges (yes, rally the troops! don't surprise them), news that affects your company or organization, and I'm sure you can think of many more important story types to share.

So, on to grant reporting

Think of this as a cross between your elementary school book report and your grant proposal (because you *did* detail your project design, plan, and monitoring and evaluation processes and metrics- right?). You have to explain what you've done, like the book report, including an overview of your budget and accomplishments to date, and what you plan on doing the rest of the time.

Funders differ on their required i) frequency and ii) information contained in the reports. Many private funders are working to standardize their reporting requirements to ease the burden on non-profits, but don't rely on that. When you get a grant, make sure you know when you need to report, and on what. Many foundations and corporations require information only at the end of the grant year, some require it semi-annually. Many government grants require more frequent, even monthly, reporting; you get a bigger chunk of money, but have to work harder on the government grant proposals and reporting (recognize and plan for those trade-offs; it may or not be worth it for you) ¹.

Bottom line, grant reporting is to make sure the project stays on track, and the funders get the return on their social investment.

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If you would like help writing your grants or reports, crafting your monitoring and evaluation or impact measurement system, or other Management issues, please contact us at info@glocalconsultantsgroup.com or +1-773-218-8270 / +1-347-480-8679.

¹ Ask us for a copy of Financial Management for Non Profits 101 , Fundraising 101 - Finding Corporate and Foundation Grants, Fundraising 102 - Templates and Resources for Efficiency, and other Glocal briefs, or download them from <https://glocalconsultantsgroup.com/glocal-briefs/>