Grant Overview Sheet

(For managing your grant after you receive it. Please download or make a copy of this document.)

Funder:

Funder Website and/or Application Platform:

Username:
Password:

Link to Funder Folder (in your drive):

Grant Contact & Contact Info:

Grant Period:

Grant Amount:

Grant Overview: Brief description of grant (copy and paste grant description from grant application)

Payment Schedule (enter date with amounts to be paid):
First Installment _____
Second Installment _____

Acknowledgements (enter date thank you letters were mailed or emailed):
First Installment _____
Second Installment _____

Grant Reporting Schedule:
Progress Report due _____ Internal deadline to have info gathered _____
Final Report due _____ Internal deadline to have info gathered _____

Reporting Matrix:

Required Information	Grant Period

Progress Report	
Final Report	

Key Deliverables: (What we agreed to deliver in the application)

Anticipated Reporting Questions: Below is a list of common reporting questions.
(Add a link to the funder's actual reporting questions when they are provided)

- How have you served the communities identified in your application?
- Describe the specific results you achieved (what changed, when, and how it was measured) for this reporting period.
- If you did not achieve the progress you expected, please explain why and your future mitigation strategy (if any).
- Share any data used to measure your progress.
- Share any lessons learned during the grant period as it relates to this specific grant and how to improve your work going forward.
- Explain how the funds were used to support general operating or project expenses. Please be sure to provide an explanation regarding variances between budgeted and actual expenses.
- Provide a budget vs. actual expenses report for the reporting period (typically expected on a spreadsheet)
- Provide any printed materials to accompany your report (e.g. an official evaluation report and/or highlights with links to social media and media coverage)
- Do you have additional questions or comments?