

Resource type	Tool	Date created	2019	Last reviewed	2022
Resource series	Rebalancing grantee–donor power for better MEL				
Project	Monitoring, Evaluation and Learning Toolkit for Grantmakers and Grantees				
MANAGE an evaluation or evaluation system					

Grantee reporting menu

For the Open Society Foundations’ Economic Justice Program (EJP), reporting is one of several ways to learn from our partners. When coupled with informal and ongoing conversations and check-ins, reporting can help us collectively understand whether what we thought would work is in fact playing out as expected, what is proving surprising or challenging, and how we and our partners are adapting to an ever-changing environment—the emphasis is on learning.

We see grantee narrative reports as particularly useful to:

- Monitor changes and progress to our own and grantees’ strategic goals and ambitions
- Understand context and landscape shifts in a grantee’s field
- Understand and measure “success” and “failure” of grantees against the proposed objectives in their submitted proposals
- Ensure and document the charitable use of OSF funds
- Enable better decisions about grant renewals or other grants in a portfolio/body of work

At the same time, we appreciate the time it takes to generate reports and we want to support a reporting system that is useful for both us and for our partners. In this spirit, EJP is happy to accept other forms of reports (such as annual reports, board reports, reports for other donors, etc.) and even some more creative options as long as the minimum criteria (below) are met.

To discuss this, or anything related to this guidance, please contact your EJP Program Officer.

Minimum reporting standards

Financial report (select appropriate option)

- **Project, program, or organizational grant:** Actual Expenditures vs Project Budget financial report; Must report on how EJP-specific funds were spent. If Expenditure Responsibility applies, please discuss budget reporting details with EJP counterparts.

- **General support:** Annual Organizational Expenditures. Do not report on how EJP-specific funds were spent.

Narrative report

We accept narrative reports in a range of formats, styles, and levels of specificity. We have a full menu of options below which should be discussed and finalized with your relevant EJP Program Officer in advance of the report timeline. Whichever option(s) are selected, they must include the following elements:

- An update of key accomplishments/setbacks over the report period vis-à-vis the original outcomes and timeframe proposed in the grant (if a final report for a multi-year grant, for the entire grant period)
- Brief discussion of any unexpected/unanticipated outcomes or challenges over the grant period
- Description of any failures, setbacks, and/or lessons learned
- Outcome and indicator progress update with accompanying explanation of observed changes (using the outcomes and indicators in the grant proposal or the latest agreed revisions); the explanation may also be primary content of the narrative report
- For interim reports only: any pivots/adjustments you plan to make for the remainder of the current grant (including adjustments to the original outcomes and indicators)

Recommendations

Plan ahead | Agree on reporting timelines and method with your EJP Program Officer as far in advance as possible (ideally during the proposal stage). When doing this, consider reporting timelines and expectations for other donors and your board. Let us know about these and we might be able to make adjustments to allow great alignment of your existing reporting demands/cycles.

Consolidate approved changes | Use reporting as the opportunity to consolidate and document any changes made to the original approved grant budget, outcomes, indicators, or activities. For project, program, and organizational grants, budget and activity shifts may need to be discussed with your relevant EJP Program Officer (review your grant letter or reach out with questions). All outcomes and indicator changes should be discussed with your relevant EJP Program Officer.

Propose further changes | Use reporting as an opportunity to propose new directions (for the remainder of the grant or for future work in this area) or shifts you hope or plan to make. Flag any that you would like to discuss with your counterparts at EJP.

When in doubt, reach out | We've found that while offering this type of flexibility is helpful for both our partners and EJP, it sometimes means trying or doing something for the first time. Inevitably, doubts and questions arise. This isn't meant to be a guessing game either, so while working on your report feel free to be in touch with your counterparts at EJP to discuss.

Menu of narrative reporting options

Below we explore a range of different reporting options that EJP can accept with the caveat that each must meet the minimum requirements cited above. The further caveat is that depending on the type/structure of the particular grant and its funding source/structure some of these options may not be available. Your EJP counterparts are able to provide you with the menu of options available for your particular grant at this reporting juncture. Remember the final selection must incorporate the minimum criteria above. In some cases, we expect a particular report type to fall short on one or more of the minimum criteria. If interested in one of these options, discuss what supplements will be required with your EJP Counterpart. Options may be used in combination with one another (e.g. accept an existing report and have a conversation) or some may be used on their own.

If grant was funded by either FPR or OSPC (as opposed to OSI), all references in the report MUST say OSPC/FPR rather than OSF or EJP. Follow up with EJP counterparts in the case of any uncertainty on how to handle this.

Menu at a glance

- Stand-alone supplements needed
- EJP reporting template
- Other donor, board, or annual report
- Grantee presentation
- Structured conversation
- Case study
- Blog post(s)
- Grant product
- Grantee peer exchange event

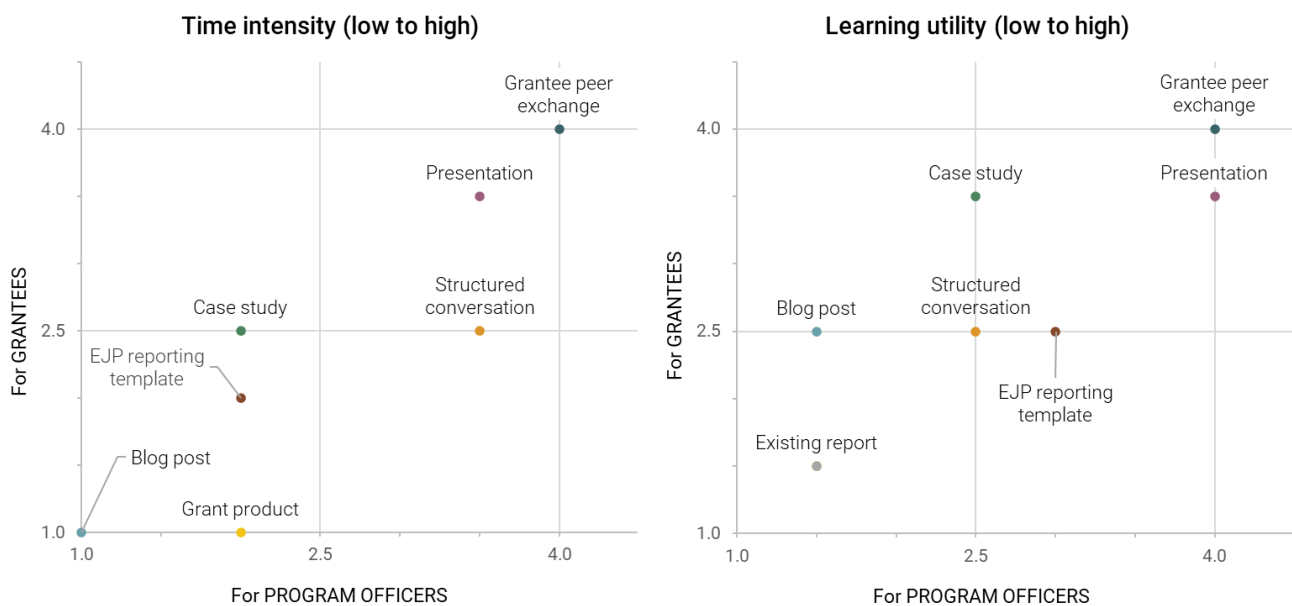
Time investment & learning

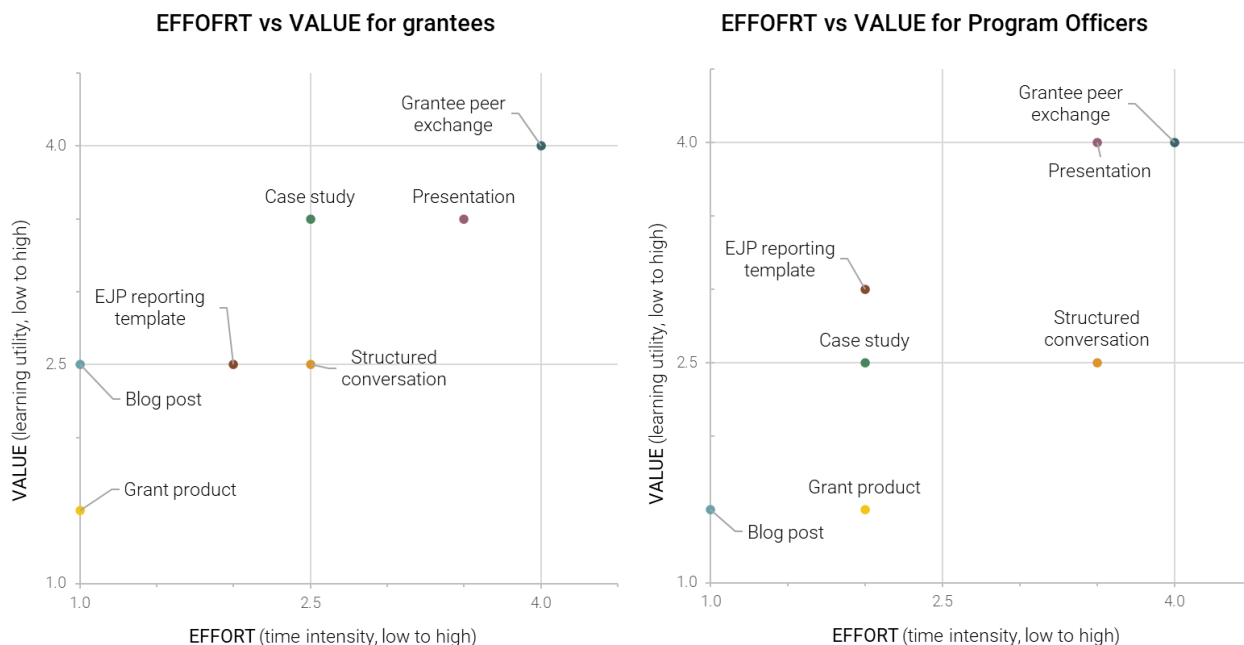
In exploring and testing various reporting options, we learned a tremendous amount about the preferences, realities, and value of different types of reports from the perspective of both EJP Grantees and Program Officers. Though we analyzed a wide range of factors and criteria, we were primarily interested in time intensity--how long it takes to produce/review this report type relative to others—and learning utility—extent to which report type is conducive to learning.

The charts on the following page summarize the perspectives from EJP Program Officers and grantees on both criteria (1 = lowest; 4 = highest). Unsurprisingly, those options with the highest

learning utility are generally the most time-intensive for both EJP and grantees. Take the charts with a grain of salt; these are generally observed trends, not predictive of specific reporting instances. From a grantee perspective a couple of report types—like a presentation or case study—have a lower time intensity when they can be used for other purposes (e.g. board meetings, public dissemination) making the investment in time for the specific reporting event less burdensome. Likewise, for Program Officers, a few report types—like existing reports, blog posts, and grant products—can have a much higher learning utility depending on the content, structure, and purpose of these. **We don't expect to always be in the top learning quadrant.**

Like many aspects of grantmaking and design, selecting a report type must be fit-for-purpose. Looking at the charts below and selecting a report type based solely on its projected placement for time-intensity or learning utility doesn't make sense. Funding size, grant length, nature of the project/program, grantee-PO relationship, and a variety of other factors should be considered when selecting a report type.





Reporting menu detail

Report type	Description	EJP provides
EJP reporting template	EJP-designed reporting template; 10-page maximum with learning-oriented questions.	Document template
Other existing report	A report generated by the grantee for another purpose (e.g. another donor, board, or annual report); must cover the same scope of the grant.	Approval to use other report
Presentation	Grantee designs a visual presentation to be delivered to EJP counterparts in person or via video chat. Q&A and/or more informal conversation to follow. A minimum of two hours is suggested. Be sure to include a comprehensive outcomes/indicators update or submit them in advance.	A short set of guidance

Report type	Description	EJP provides
Structured conversation	Similar to presentation but without the visual reference point. Questions/guidance will be provided to the grantee who should primarily steer the conversation. Time for PO Q&A should be included. A minimum of two hours is suggested. When selecting this option, note that a written submission of some form is also required which must include an outcomes and indicators update. Discuss options for this with EJP PO.	A short set of guidance; approval on written submission and agreement on any accompaniments
Case study	In-depth and thorough reflection on a particular case or example the grantee explored through its work this year. Should be no longer than 15 pages. A comprehensive outcomes/indicators update must be submitted alongside the case study.	Approval to use case study method and agreement on case topic and any accompaniments
Blog post(s)	An update of key work related to the grant via a publicly available blog post. Discuss scope and timing of post(s) with EJP PO. <i>If not included in the post</i> , a comprehensive outcomes/indicators update must be submitted alongside the post(s).	Approval to use the blog post method and agreement on general scope of blog(s) and any accompaniments
Grant product	When the grant is intended to produce particular research, tools, or products to be distributed in the wider field, we can accept the final product in lieu of a bespoke report. When selecting this method, we prefer the final product to be accompanied by a dissemination plan (or summary). If it is longer than 15 pages, an abstract or summary of the product must also be attached. <i>If not included in the product</i> , a comprehensive outcomes/indicators update must be submitted alongside it.	Approval to use grant product method and agreement on any needed accompaniments

Report type	Description	EJP provides
Grantee peer exchange	<p>EJP is often funding multiple interrelated grants at the same time. This can lend itself to interesting collective conversations and peer exchange. These can be time intensive (and, depending on the format, expensive), but ultimately very worthwhile. If interested in thinking through the possibility of this, have a conversation with your EJP counterpart and come prepared with a specific idea/theme for the exchange as well as thoughts on potential attendees. These ideally happen in person (expensive!) but can also take place over video conference. A minimum of two hours is needed, but often take place over a couple of days. The grantee should also be candid about the optimal level of EJP involvement/participation (up to and including none whatsoever) for the event.</p> <p>When selecting this option, note that a written submission of some form is also required which must include an outcomes and indicators update. Discuss options for this with EJP PO.</p>	<p>Approval to use this method and agreement on planning, scope, budget, and timing, and any accompaniments needed to meet minimum reporting requirements</p>