Funder Report Kit

Two things for the next report on your desk: a checklist of what funders look for, and a sample report built from a program manager's rough notes, so you can see one turn into the other.

The checklist

Before you write

1. **Reread the proposal and the award letter.** List every activity, number and date you promised. Funders read your report side by side with that list.
2. **Read the reporting instructions twice.** Note the questions, their order, word or character limits, the deadline and the attachments (budget-to-actual, data tables, photos).
3. **Pick one source for each number** (attendance log, case files, finance system) and write down the date range. Two staff counting the same thing two ways is where most wrong numbers start.

While you write

4. **Answer in the funder's order, in the funder's words.** If they ask about "participants served", don't switch to "clients reached".
5. **Put the target next to the result** for every promised outcome, numbers first and story second.
6. **Explain any shortfall plainly:** what happened, why, and what you're changing. Funders forgive a missed target far more readily than a hidden one.
7. **Check whether a change needs approval.** Moving money between budget lines or changing activities often needs the funder's sign-off first, and government grants usually require it.
8. **Use one short story** that shows a result, with the person's permission and no identifying details.
9. **Make the money match.** Spending in the narrative should agree with the financial report. Federal awards usually pair the performance report with a separate financial report, often the SF-425.

Before you send

10. **Trace every number** back to its source, and recalculate every percentage.
11. **Promise only what the next period can deliver.** This report sets the bar for the next one.
12. **Remove names and sensitive details** (health, minors, immigration status) unless the funder requires them and you have consent.
13. **Submit a few days early** and keep a copy with the attachments. Note the next deadline in your calendar now.

A sample report, built from rough notes

Northside Reading Project is a made-up adult literacy program, and every figure below is invented for this example. The numbered marks show which note each figure came from. The highlighted gaps are things the notes didn't cover: a good draft flags them for you rather than guessing.

The program manager's notes

Hill Fdn grant $40k
Jan–Dec. target: 60 enrolled, 70% complete

Jan–Jun:
enrolled 41 (1) (2 cohorts)
completed 27 (2), 6 active
TABE +1.3 lvls (3) avg
9 GED or job since (4)
lost Eastside room Mar, moved to library,
3 wks gap (5)
2nd teacher (6) hired May
spent $21,400 (7) of 40k
Rosa (ok to share, no last name): read to grandson first time (8),
cried

The draft, in the funder's format

1. Progress toward the goals in your proposal

Goal for the year	Target	January to June
Adults enrolled	60	41 (1)
Completion rate	70%	27 of 41 (66%) (2), with 6 still enrolled

We enrolled 41 adults (1) across two cohorts in the first half of the year, against a goal of 60 for the year. Of these, 27 have completed the program (2) and six are still attending. Participants' reading scores rose by an average of 1.3 grade levels (3) on the TABE assessment, and nine have since earned a GED or found work (4).

2. Challenges and changes

In March we lost our classroom at the Eastside site and moved classes to the library, which interrupted instruction for three weeks (5). [not provided: whether the library space is permanent, and any added cost] We hired a second teacher in May (6). [not provided: why the second teacher was needed]

3. A participant's experience

One participant, Rosa, has now read to her grandson for the first time (8). She shared this with us and agreed that we could pass it on.

4. Budget and the next six months

We have spent $21,400 of the $40,000 grant (54%) (7). [not provided: whether spending is on budget by line, and plans for July to December]

What to notice

- The completion rate is reported as it is (66%, against a target of 70%), next to the six people still enrolled. It isn't rounded up or left out.
- The percentages (66% and 54%) are worked out from the notes and nothing else.
- Rosa's story uses only what the notes say and only her first name, as she agreed. It doesn't add a date or a detail to make it more moving.
- Three gaps are flagged instead of filled: why the teacher was hired, the library's cost, and the budget by line. The manager answers them in a minute; a guess could cost the renewal.

Want a draft like this from your own notes?

Send the funder's questions and your notes to hello@fundernote.com. A complete draft comes back within 48 hours, with every figure traced to what you sent. Your first draft is free.

FunderNote