Optimizing Reporting

A ResultsLab Workshop for Colorado Access Foundation Grant Partners

Meet the ResultsLab Team!

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RESULTSLAB

ACCELERATING IMPACT

We **bring data to life** with cutting edge, simplified, actionable tools and practices to people working for social good, giving them the mindset and skillset they need **to catalyze change** for those they serve.

Agenda

Introduction to COAF Reporting: Why, What, How

Learning from Practice: Deepening our How

- Exploring promising practices in donor reporting (Reporting checklist)
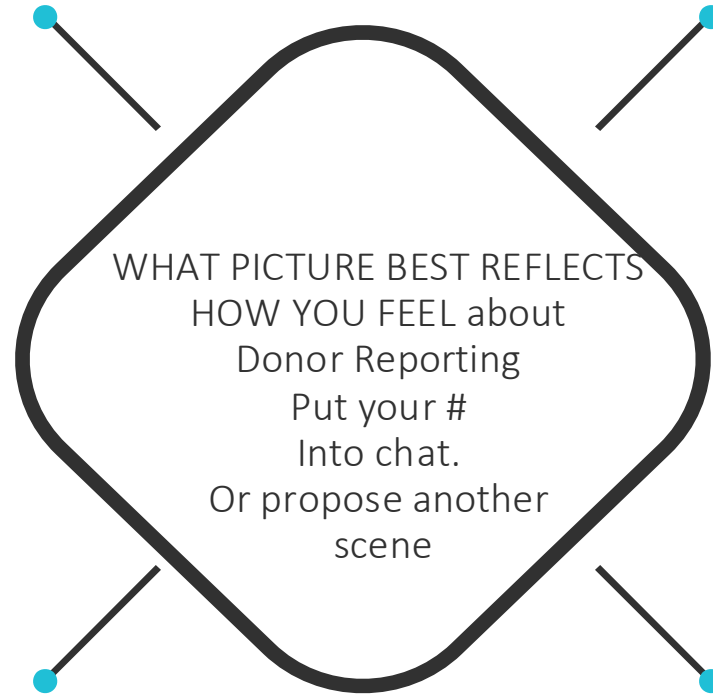
Reflection, Q+A, and Takeaways

Say hello in the chat!
- Name
- Organization you're representing today, and...

1

2

WHAT PICTURE BEST REFLECTS
HOW YOU FEEL about
Donor Reporting
Put your #
Into chat.
Or propose another
scene

3

4

Voices of Community Partners

- Participants were especially energized by ideas of application and report options that could offer **mutual value**, where they could create and share a product that could also serve their own needs. This could include submitting **different mediums**, like audio or video.

- Participants do not want to be asked to submit quarterly or periodic progress update reports; things don't typically change on a quarter-to-quarter basis.

- Participants hope that funders will consider capturing more qualitative and less quantitative data (ensure strong use case when requesting quant data)

- Allow participant to align funder reporting request with their existing reporting cycles (i.e., allow to report on big picture of what we achieved)

- Allow grant partners to report on total impact instead of asking the impact of your dollars

- Centering shared learning: Organization shares their impact, challenges, lessons learned; Funder reviews and reflects back; **Funder shares learnings across grant cohort** to promote shared learning and knowledge sharing.

"I think reporting is a learning opportunity but sometimes reporting just feels like it's a box you have to check. So, then it's just like, is this worth my time?"

"When I have to do quarterly reports on gen ops stuff, I'm like i have to re-invent that we are doing our work, its going well. I have to try to spin a story. Love the idea of letting us be a bit more creative. Maybe don't ask us to do a quarterly report unless it's a massive grant where you need more dynamic reports. I'm saying the same stuff."

Measurement Goals

Learning & Improvement
COAF is accountable to the populations it supports, demonstrating measurable impact in focus areas and transparency in stewardship of funding to COA and COAF leadership, to policy makers, and to the general public.

Prove Impact
COAF will leverage more rigorous data collection from Impact Investments to demonstrate ROI and to broker broader learning for the field.

Accountability
COAF is accountable to the populations it supports, demonstrating measurable impact in focus areas and transparency in stewardship of funding to policymakers and COA.

Knowledge Generation
Funding research and projects to generate knowledge, inform strategies, and support innovative solutions in areas like transportation and funding emerging and best practices.

Measurement Focus

Measurement will be anchored to COAF's impact strategy and learning agenda. COAF will capture and elevate data to answer learning questions. We will take a phased approach, starting with 1) Core data practice and then moving into 2) Learning deep dives, and 3) Collaborative data practice.

Measurement Approach

Our measurement practice will be responsive to and **feasible** for the contextual needs of the community, grant partners, and COAF's small staff. It seamlessly **integrates** with Colorado Access, ensuring practicality and efficiency in implementation while providing valuable insights for both the organization and its key partners.

Guiding Values for our Measurement Practice:

Equitable
Adapting application and reporting requirements so that are an equitable lift for grant partners, dependent on organization size and capacity.

Inclusive
Allowing grant partners to capture and share data in a way that works well for them.

Transparent
Providing open communication about what data is being asked for, why, and how it will be used.

Actionable
Committing to acting on the data collected, using them to inform decision making and program enhancements.

WHY | Striving for benefits across groups

Grant Partners capture learning + opportunities for supports

Generate learning and promising practices for broader field of **community partners**

COAF communicate results (and accountability) of investments

We are committed to being upfront about why we're asking for certain data and how we plan to use it.

→ **Narrative Report**: Summarizing your activities, achievements, challenges, and lessons learned over the reporting period.

- o Data related to program activities and achievements will inform how we communicate the impact of our grant portfolio to the community, to our team, and our board of directors.
- o Data related to challenges will help us to more deeply understand your experience and will inform additional support we will consider providing our grant partners.
- o Data related to lessons learned may be elevated to a shared learning space for other nonprofits or funders to learn from your experiences.

→ **Financial Report**: Including financial statements to ensure funds are being utilized appropriately and in accordance with the Grant Agreement.

- o Data related to financials will be used for compliance and accountability to meet private foundation requirements.

HOW | Selecting your optimal format

Written Submissions:
- Written reports should be submitted as a Microsoft Word document or PDF.
- Feel free to include supporting documents, such as photos, charts, or testimonials, to enhance your report.

Audio Submissions:
- Audio reports should be submitted as an MP3 file.
- Keep your recording to a maximum of 10 minutes.

Video Submissions:
- Video reports should be submitted as a MP4, MOV, or MKW file.
- Use visuals, such as slides, photos, or video clips, to illustrate your key points.
- Aim to keep your video under 15 minutes in length.

Submitting Reports from Other Funders
- If the report covers the items mentioned and is in alignment with the timeline, send it to us for review.
- If the report only includes some of the items mentioned, send it to us with a supplemental narrative report.

WHAT | Right sizing reporting to your grant type

Opportunity Fund

Gen Ops/Program Support

Pilot and demonstration

Special Projects/Initiatives

Impact Investing

Impact goal

Colorado is a place where all can achieve their fullest potential for health.

Community outcomes

Health workforce
A more diverse health care workforce.

Housing
More individuals have access to safe, stable, and affordable housing.

Food
More individuals have access to affordable, nutritious food.

Transportation
More individuals have access to reliable transportation.

Signals of progress

- Increased number of health care workers that are representative of Colorado's population in terms of race, ethnicity, and socioeconomic background.
- Increased number of health care workplaces that are culturally responsive.
- Greater trust between health care providers and patients.

- Increased access to permanent supportive housing.
- More Coloradans are able to afford housing.
- Increased homeownership in communities of color.

- Increased access to healthy, nutritious, culturally relevant food.
- Increased participation in food assistance programs.
- Improved integration of convenient and sustainable solutions that expand local food systems, programs, and services.

- Improved transportation services to help people access health care appointments.
- More affordable and accessible modes of transit options for under-resourced communities.
- Increased transportation equity and accessibility for under-resourced communities

WHAT| Narrative Report

1. Introduction
2. Program Activities
3. Geographies Served
4. Populations of Focus Served
5. Challenges + Lessons Learned
6. Achievements and Milestones
7. Future Plans and Recommendations
8. Attachments

Which of these will be the easiest for you to report on?

Which may serve to be more challenging?

What questions do you have? What do you see as potential challenges in completing?
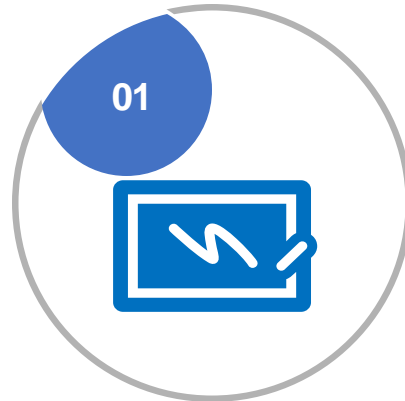
Diving into the "HOW"
Learning from Practice

What do you see as the leading challenges in overall quality reporting?

Top Ingredients for a Strong Report

Honest Reflection

Funders are looking to move beyond a success report and landing in the true and honest challenges and learning you have gained
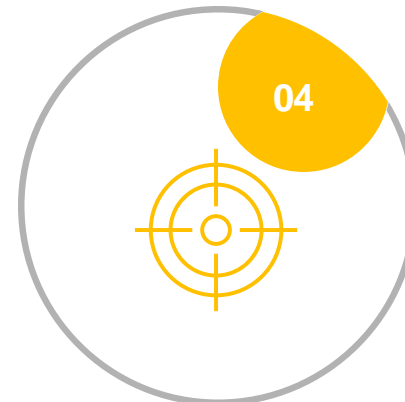
01

02

Data Story Telling

Include quantitative and qualitative data to support your claims. Charts, graphs, and testimonials add credibility and help communicate success in a more compelling way.

Outcomes Focused

Clearly state the objectives of your project and the outcomes you've achieved. Use measurable indicators to show progress and impact over time.

03

04

Clarity + Alignment

Ensure there is clear story to tell and that is done in a way that is aligned with the grant expectations and is easy to follow.

Grant Reporting Checklist

- Alignment with Grant Focus/Goals
- Clear and Measurable Outcomes
- Data and Evidence
- Visual/Role Clarity

Grant Reporting Checklist

1. Alignment with Grant Focus/Goals
- ☐ Does the report explicitly address outcomes or activities that you have been funded for? (and does it align with the funders goals more broadly?)
- ☐ Have you clearly stated how the funding contributed to achieving this progress?

2. Clear and Measurable Outcomes
- ☐ Have you outlined the objectives of the project and reported on the progress made?
- ☐ Have you provided measurable data to demonstrate what was achieved as a result of your activities?

3. Reflective Challenges and Learning
- ☐ Have you discussed any challenges encountered during the project?
- ☐ Did you explain how these challenges were addressed and what was learned from the experience?

4. Data and Evidence
- ☐ Have we completed all the metrics requested?
- ☐ Is the data presented in the report accurate and reliable?
- ☐ Are both qualitative and quantitative outcomes included to support your progress?
- ☐ Have you used appropriate charts, graphs, or tables to present data clearly?
- ☐ Are there case studies, testimonials, or stories from participants to bring to life your outcomes?

5. Financial Accountability
- ☐ Have you provided a clear financial breakdown of how the funds were spent?
- ☐ Is the financial reporting transparent and consistent with the original budget or proposal?
- ☐ Did you explain any variances in spending?

6. Visual/Audio Clarity
- ☐ Is the information presented in a logical, coherent flow?
- ☐ Is the report visually appealing and easy to navigate?
- ☐ Did you use clear headings, subheadings, bullet points, and graphics where appropriate?
- ☐ Did you provide clear explanations for all data, charts, or complex ideas?
- ☐ Are images relevant to the project and aligned with the report content?
- ☐ Is the report concise, without unnecessary jargon or overly complex language?

8. Accuracy and Compliance
- ☐ Did you follow the funder's specific guidelines for report formatting, structure, and content?
- ☐ Have you thoroughly proofread the report for typos, grammar issues, and clarity?
- ☐ Is the tone consistent throughout the report?
- ☐ Have you double-checked all data and facts for accuracy?
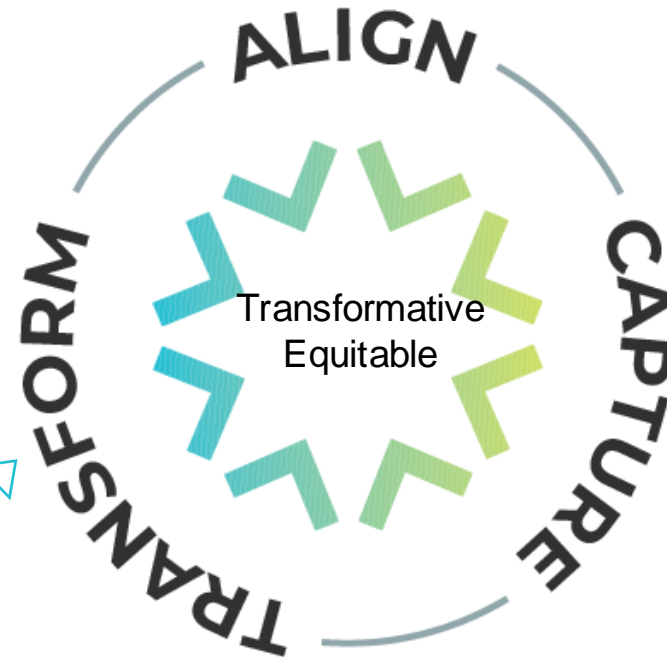- ☐ Is the report submitted by the required deadline?

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Takeaways

ACT CYCLE:
Setting the Foundation for Strong Reporting

Goal: Shared clarity on intended goals, outcomes and core activities to achieve these

Key Developments:
- Impact Strategy
- Program Models

Goal: Develop and activate on an inclusive measurement plan to collect data to drive change

Key Developments:
- Measurement Strategy
- Measurement Plan
- Data Audit
- Data Collection Tools
- Data Flow + Systems

Goal: Energize teams and provide accountability for informed decision-making and continuous improvement

Key Developments:
- Data Use Plan (focus on funders as 1 key audience)
- Data Dashboards

ALIGN

CAPTURE

TRANSFORM

Transformative
Equitable

Taking it Forward

- Consider your reporting format (i.e narrative, audio, video)

- Set up your data metrics for your progress + outcome reporting

- Engage in your annual COAF reporting

- Reach out with questions or feedback on your experience to ResultsLab or Mirella

- Engage in future ResultsLab workshops that will help with strong data practice to inform your reporting.

UPCOMING WORKSHOPS

Inclusive Data Practice
October 15

Data Management
November 14

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Thank you! Reach out anytime!

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