

# Brainerd Foundation Progress Reporting

## Purpose

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At the Brainerd Foundation, we depend upon grantee reporting to evaluate progress toward our shared conservation goals. Additionally, grantee progress reports provide us with richer context for conservation endeavors in our funding region, so we can be better grantmakers.

We view such evaluation as a chance to learn from our grantees about the successes and challenges they face. We also see this process as an opportunity for grantees themselves to strategically reflect on all that has transpired during the course of the grant term.

## Reporting Procedures

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*Timing and Submission.* For all grants, a progress report is due nine months after the grant date. If this is a multi-year grant, an interim report is due nine months after the grant date for the first year, and then nine months after the grant date anniversary for all subsequent years of the grant term. Please submit reports via e-mail ([info@brainerd.org](mailto:info@brainerd.org)).

You may be writing your narrative before the end of the grant term or before all of your goals are realized. Again, we simply ask for your candor and an update on the status of your work at the present time. If significant programmatic or financial events transpire after you complete this process, we would appreciate an update after the grant term expires.

*Report Length.* We ask that you *keep your answers brief*. We don't expect you to answer every question; the ones you do answer can be addressed in a few sentences or with bullets. All grant reports should include two parts: narrative and financial. These are described in greater detail below.

*Press Coverage.* Many grantees choose to include related news clippings. We are most interested in the overall advancement of issues and campaigns rather than, for example, the number of times an organization is mentioned in the media. We especially appreciate organizations or coalitions that share credit or bring new or non-traditional spokespeople to speak on behalf of conservation issues, although this may mean sacrificing organizational credit.

*Photographs.* We encourage grantees to share favorite images of the landscapes and wildlife that they work on behalf of, as well as the people who live and work there. If you are interested in seeing your photographs featured on our Web site, please send high-resolution images as an attachment to an e-mail or saved to disk via regular mail. Please describe what each image depicts, how it is related to your work, and the name of the photographer.

## Financial Information

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*General Support.* For grants applied to an organization's general budget, please submit a current balance sheet and a recent financial statement for the organization showing revenue and expenses for the fiscal year(s) during which the grant funds were spent.

*Project Support.* For grants supporting a specific project, please submit recent reports showing revenue and expenses for both the project and the organization in the fiscal year(s) during which the grant funds were spent. It should clearly show the amount granted by the Brainerd Foundation and how these funds were expended.

*Multi-year Grants.* The interim report should include the previous items as well as an organizational budget and (if germane) a project budget for the year the next round of Brainerd Foundation funds will be used.

For those reporting before the end of the grant term, please show how the grant funds have been spent to date.

## **Progress Assessment and Reflections**

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In the narrative component, we ask that you reflect on both the dynamics of the funded issue, the effectiveness of your strategy, and how we might learn from our collective efforts. This reflection should steer you, and us, toward clearer choices for spending time and funds.

The Brainerd Foundation understands that grantees and funders alike only improve their work when reflecting honestly upon it. To that end, we pose the following questions. Please be as candid as possible and only answer questions that are relevant to your work. Your answers can be brief; bulleted remarks are encouraged.

### **Revisiting Your Organizational Data**

You may recognize these questions from our grant application. Starting in 2011, the Brainerd Foundation is gathering this information about all applicants at the beginning and end of the grant term primarily for internal foundation evaluation purposes. Our goal is to determine, over time, if grantees in our region are growing, diversifying, etc. If you are a state or regional office of a national organization, please respond with data reflecting the office in which you are based.

- Current number of paid staff (specify full-time or part-time)
- Approximate number of individuals who support and help advance your conservation agenda.
- Estimated number of individuals who have contributed financially within the past 12 months (include members)
- Number of individuals who have made a gift of \$250 or more within the past 12 months

### **Progress Assessment**

- Tell us about key outcomes achieved during the grant term. We encourage you to address specific events or changes that have influenced the protection of land, the advancement of policy, the growth of community engagement, the development of coalitions and relationships with stakeholders, or the strengthening of organizational capacity.
- What didn't work as you expected?
- Describe how effective your efforts were in reaching a broader set of voices and stakeholders.
- In your proposal, you were asked how you would like the Brainerd Foundation to measure your success. Please review what you wrote and briefly tell us how you did. We encourage you to reflect on what facilitated or hindered your progress. We encourage you to include data or anecdotal observations in your narrative.

### **Specific Program Queries**

We understand that not every organization can embrace all tactics that might lead to social change. That said, we are interested in learning more about the ways your organization may have pursued some of the following tactics. Address only those bullets pertaining to your grant.

#### **Conservation Policy Program Grants**

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If you answer "yes" to any of the following, please provide an explanation and examples.

- Did your organization build its credibility and influence among community and policy leaders?

- Did your efforts help public officials and policy-makers to become champions for the goals of conservation?
- Did your organization broaden its base of engaged stakeholders?
- Did your work facilitate effective collaboration among conservation-focused groups to achieve conservation goals?

#### Place-based Conservation Program Grants

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If you answer “yes” to either of the following, please provide an explanation and examples.

- Did your organization enhance its credibility and effectiveness among community and policy leaders?
- Did your efforts increase the diversity of voices within the conservation advocacy and stakeholder communities?

#### Conservation Capacity Program Grants

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If you answer “yes” to any of the following, please provide an explanation and examples.

- Did your organization use any new communications and engagement tools or tactics?
- Did your staff seek out effective leadership practices and trainings?
- Is your organization’s funding base more stable now than it was at the beginning of the grant term?

### **Reflections**

Please answer only those questions that are relevant to your work and that inspire your interest:

- What do you think you and your grantee colleagues need to know to achieve more success in the coming years? In other words, what vexing questions keep you up at night?
- Given your experience, what ideas can you offer us on how to create more effective support for conservation? Tell us about ideas you have for your organization, the community at large, and the Brainerd Foundation or other funders.
- The Brainerd Foundation is interested in ways we might build your organization’s capacity or the capacity of the larger conservation community to achieve long-term sustainability and program goals. Please share any comments regarding the need for additional support (for example, to fund leadership training for mid- or executive-level staff or leadership retreats for the larger conservation community, or to provide communications tools or initiatives to help engage more citizens in your cause).