



Conservation Policy Reporting Requirements

If your organization has received a grant from the Brainerd Foundation, you will receive an email reminder to submit your progress report (due nine months after the award date) with a link to submit the report via our grantee portal. The following information is required to complete the Conservation Policy progress report form.

This document may be used to collect information that will be entered in an online form. Please note: Some items call for a form field entry while others must be uploaded as a separate document.



Indicates online form field entry



Indicates document upload

Why we want you to report on your work

The Brainerd Foundation understands that grantees and funders alike only improve their work when reflecting honestly upon it. Grantee progress reports provide us an opportunity to learn from our grantees about the successes and challenges they face. They also allow our staff to evaluate progress toward our shared conservation goals and help us to be better grant-makers.

We hope that this process provides a useful opportunity for you to reflect on all that has transpired during the course of the grant term.

We value your time, so we **don't** need:

- Lengthy answers. Feel free to keep your answers brief. It's fine to use bullets.
- An answer for every question. If a question doesn't apply, feel free to skip it.
- Proof that you did it all. We know you are reporting before the end of your grant term, possibly before all of your goals are realized. It's ok if this report is a status update. If significant programmatic or financial events transpire in the coming few months, please keep us in the loop.



Revisiting your organizational data

You may recognize the following questions from your grant application. The Brainerd Foundation gathers this information about 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, engaging new stakeholders, 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. The answers provided when the application was submitted will be available for comparison as you enter current information.

- Current number of paid full time staff
- Current Number of paid part time staff
- Number of individuals that have contributed financially within the past twelve months (including members)
- Number of individuals who have made a gift of at least \$250 within the past twelve months (including members)



What we want to know about your work

We're especially interested in what you have learned that could benefit other efforts. The following will be entered in an online form. We recommend that you prepare your answers prior to logging on to the grantee portal, and then copy and paste them into the reporting form. We encourage you to keep your answers brief and skip any that do not apply.

- Please summarize in 2–3 short paragraphs the key outcomes achieved during the grant term.
- When you applied for funding, we asked you to describe how you would like us to evaluate your success. Please review what you wrote in your application and briefly describe how things went relative to your expectations. If there were significant events that affected your work, please describe them.
- Did you use any new communications and engagement tools or tactics? If so, what were they and would you recommend them to others?
- Did your staff or board take advantage of any leadership, skills-building, other training opportunities? If so, what were they, and would you recommend them to others?
- Has your organization experimented with new strategies, tactics, or tools to advance your work? Or have you doubled down on something you've done before because it works? If so, please share what you are doing and learning. We are just as interested in things that aren't working as we are in your successes. And please be brief; we'll get back to you if we have questions.



Reflections

Please answer only those questions that are relevant to your work.

- What do you think you and your 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).



Financial statements

- Please upload the most recent balance sheet for the organization.
- Please upload a financial statement for the organization showing revenue and expenses for the fiscal year(s) during which the grant funds were spent.
- For project support grants only. Please upload a year-to-date financial statement showing revenue and expenses for the project in the fiscal year(s) during which the grant funds were spent. Show the amount granted by the Brainerd Foundation and how these funds were expended.
- If one or more years of funding remain in your grant term, please upload an organizational budget for the coming year of funding.
- For project support grants only. If one or more years of funding remain in your grant term, please upload a project budget for the coming year of funding.



Other supporting materials

- Upload additional materials that are essential for the foundation to understand your organization's accomplishments supported by this grant.



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 feel so inclined, please upload any images you would like to share with us. You will be given the opportunity to specify how each image may be used by the foundation. For each image uploaded, please provide the following:

- Photo Title
- Photo Caption, describing how the photo illustrates the work of your organization.
- Photo Credits