

June 2016

ALF GRANT REPORTING REQUIREMENTS

ALF is working to streamline its reporting process, aiming to make it easier for grantees. Reports should be concise and provide a short and to-the-point analysis of the program or project.

Frequently Asked Questions:

How often does ALF require a report?

Grant reporting is expected at least every 6 months, unless otherwise noted in the grant approval letter. All reporting requirements are outlined in the grant approval letter. Please contact us if you have any questions.

Does ALF require a particular form or format for mid-year and year-end grant reporting?

No specific grant reporting form is required at this time, however, ALF does have a template which can be provided to grantees upon request. For some types of service delivery, ALF has worked with grantees to design a customized form for the presentation of statistics. Please contact us if you are unsure whether your program has a template which should be used for your reports.

Please email the report to your Grants Coordinator as one single PDF document.

What does ALF require to be included in a mid-year or year-end report?

In terms of report content, in virtually all cases, the type of information required by ALF is similar to what we expect the grantee's own Board would be interested to see for purposes of monitoring outputs, outcomes and impact.

Generally, ALF would like the following information included in a report:

Grantee Organization and Program in General

- Brief introduction about the organization, and the program/project, reiterating the general goals, objectives and expected impact. This can be very brief, limited to a few sentences.
- Description of any notable changes in the organization's key staff, Board of Directors, premises, strategic direction, funding sources or other information relevant to the program, project or the ALF grant.

Program Activities

- Outline of the specific goals or targets for the program/project for the current grant period, as described in the grant application.
- Presentation of outputs and/or activities achieved during the reporting period, as well as what is expected for the remainder of the grant period, if applicable.
- Presentation and comparison of output and outcome data from the same period in the previous reporting period(s), to be used as a reference in analyzing the data for the current period.

Note: In many cases, a table or chart provides a concise way of presenting targets for the period, outputs for the reporting period, expected outputs to the year-end (if applicable), and a comparison to outputs in previous years (if applicable).

- A narrative analysis of the current period outputs including:
 - ✓ Were targets and/or goals achieved? Why or why not?
 - ✓ If targets and/or goals have not been met, what is being done to address this?
 - ✓ Discussion regarding how your outputs have contributed to your desired outcomes and impact.

Financials

- The mid-year and year-end financial reports are required to include a reconciliation comparing the actual revenue and expenses for the period to the budget that was approved at the time of the grant application, with an explanation of variances.
- Audited financial statements are expected to be submitted to ALF within 90 days after the grantee's fiscal year-end. Please let your ALF Grant Coordinator know if you require an extension.

When preparing ALF grant reports, it is imperative that the original grant application be reviewed as a point of reference for the discussion. It is not sufficient to just present expenditures or statistics for the period. It is also not sufficient to simply state that the program is going well or is proceeding as expected. The most important part of the report is the analysis discussion which should attempt to explain what the numbers mean, i.e., how the work in the reporting period is making a difference to the target community, as anticipated in the grant application.

For more information or to provide feedback, contact your Grants Coordinator.

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Please note: This Bulletin supersedes Bulletin 2013-1 "ALF Grant Reporting" dated April 8, 2013.