Grant Reporting Checklist

PURPOSE

This checklist provides a structured approach to preparing for grant reporting by ensuring that all necessary data, documentation, and narrative inputs are collected throughout the reporting period. It supports both evaluation and program staff in organizing the information needed for accurate, timely reports.

Use Case

You are approaching a reporting deadline (e.g., quarterly, semi-annual, or annual) and need to ensure that all required data, program insights, and documentation have been collected and organized for report development.

ABOUT BSRI

BSRI was created to support informed and effective decision-making for our partners with tools, resources, and data for action. As we wind down operations, we are creating these resources for the community to continue the work. We use our guiding principles in engaging with partners and communities, putting people first through accountability and reciprocity, communicating transparently, and sharing our knowledge widely.

ABOUT THIS DOCUMENT

BSRI developed this checklist based on our experience supporting partners through the full reporting process, and we know how quickly reporting deadlines approach. It is easy for key details to get lost along the way, so this tool is designed to help teams stay organized, consistently capture what matters, and avoid last-minute scrambling. By building these practices into your workflow, reporting becomes more manageable, accurate, and meaningful.

USE OF ARTIFICIAL INTELLIGENCE (AI)

Our organization utilizes artificial intelligence (AI) tools to enhance efficiency, support data analysis, and strengthen evaluation practices. We also encourage our partners and clients to thoughtfully explore AI as a means to build future-ready evaluation capacity.

All AI use is governed by strict data privacy and ethical standards. We do not input any personally identifiable information (PII), protected health information (PHI), or other sensitive data into AI systems in a manner that would violate HIPAA or other applicable privacy regulations. Additionally, we exclusively use licensed AI tools and platforms that explicitly prohibit the use of submitted data for model training or retention beyond the scope of the intended task. This ensures that all information remains confidential, secure, and protected.

HOW TO USE THIS RESOURCE

Phase 1- Report Planning and System Tracking

1. Prepare for the start of the grant or reporting period

Review the Notice of Award (NOA) and key grant documents (e.g., program narrative) to understand the grant requirements. This also includes ensuring your team has a clear way to capture data and program updates from the start. If you are already mid-grant, use this section at the start of a new reporting period to ensure all requirements and systems are in place.

What is a Notice of Award (NOA)?

The Notice of Award (NOA) is the official document from the funder that outlines the grant's requirements. It includes key details such as reporting timelines, required data and outcomes, target goals, and any specific conditions tied to the funding.

The NOA serves as your primary reference throughout the grant. When questions arise about what to track, report, or prioritize, return to the NOA to confirm expectations. Reviewing it at the start of the grant and revisiting it before each reporting period can help ensure your program remains aligned with the funder's requirements.

What is a reporting period?

A reporting period refers to the timeframe covered by a grant report (e.g., quarterly, semi-annually, or annually).

A. Review the grant agreement or Notice of Award (NOA) for reporting requirements.

In the grant documents, identify and take note of the following:

- Target goals or performance expectations (e.g., enrollment targets, completion rates)
- Required data to report (e.g., participants served, follow-ups, specific outcome measures)
- Required report sections or templates (e.g., narrative sections, tables, or portal-based reporting like SPARS or EHB)
- Reporting timelines and deadlines (e.g., quarterly, semi-annual, annual submission dates)

Optional AI Support

You can use AI tools (e.g., ChatGPT) as a double-check when reviewing grant requirements. For example, you might paste relevant sections of the Notice of Award or reporting guidance into a separate document and ask: "What reporting requirements or data elements should I track?"

This can help you identify anything you may have missed. This should be used as a supplement, not a replacement, for carefully reviewing the original grant documents.

2. Set Up Your Data Tracking System

Once you understand the grant requirements, set up simple systems to track the data and program updates needed for reporting. For quantitative data (numbers), this might include a shared spreadsheet or database to track participant enrollment, services, and outcomes. For qualitative data (stories, narrative), you might opt for a shared text document (e.g., BSRI called ours "running notes": see C below) to capture activities, successes, challenges, and key updates from meetings or check-ins. Ensure these tools are clearly named, stored in a shared location, and aligned with the grant's goals and reporting requirements so information is consistently captured.

Data Workflow Overview

Before setting up your tracking tools, it is helpful to understand how data will flow through your program. A simple workflow ensures that information is collected, entered, reviewed, and used consistently.

A basic data workflow includes:

Intake → Data Entry → Review → Reporting → Storage

- Intake: Participant information and baseline data are collected by [staff title]
- Data Entry: Information is entered into the tracking system by [staff title]
- Review: Data is checked for completeness and accuracy by [staff title]
- Reporting: Data is used to complete required reports by [staff title]
- Storage: Final data and reports are saved in an organized location by [staff title]

A. <u>Decide how you will track participants, services, and outcomes.</u>

Choose a data tracking system that fits your program (e.g., a shared spreadsheet, database, or existing system) and ensure it can capture all required data identified in Step 1.

Questions to ask yourself

- Is there a required data entry system or portal provided by the funder?
- Do we need to use or create our own internal data-tracking system?

B. Set up a participant tracking system.

Create a structure to track data and milestones (e.g., intake, follow-ups, discharge). Make sure fields align with the required data and reporting expectations identified in section one.

Example: Participant Tracking Spreadsheet Columns

- Participant ID
- Enrollment Date
- Demographics (as required)
- Service Type
- Service Date
- Follow-up Date
- Status (active/inactive)

Question(s) to ask yourself when setting up your system

- Is there a program logic model that includes the outputs and outcomes you need to be tracking? If not, check out the BSRI logic model guide.[1]
- Do our spreadsheet columns include what is required as per our grant requirements (section 1 above)? If the data is not collected, you cannot report on it!
- Who is responsible for entering and maintaining the data? Is there a backup if that person is out of the office?
- How often will data be entered and updated? (e.g, daily, weekly)
- What checks will be used to ensure data accuracy? (e.g regular review, spot checks)
- Whether any data needs to be de-identified to protect participant privacy before sharing data with another department or organization (including the funder).
- If collecting data from the same individuals or groups at multiple time points do we have an identifier that can link them across different spreadsheets? This is important to consider only if you are required to collect longitudinal data - talk to an evaluator if you have further questions about this topic.

Lastly, review your system against the NOA to ensure all required data, outcomes, and reporting elements can be captured consistently.

Optional AI Support

If you are unsure how to structure your tracking system, AI tools (e.g., ChatGPT) can help you get started. For example, you might ask: "What column headings should I include in a participant tracking spreadsheet for a grant program?"

This can provide a helpful starting point, especially if you are new to working with spreadsheets or data tracking. Be sure to review and adjust any suggestions to align with your specific grant requirements.

C. Organize and store data tracking system(s) in a shared location.

Ensure all tracking documents (e.g., spreadsheets, notes, databases) are clearly named and accessible to relevant team members.

Question(s) to ask yourself when setting up your system

- What files (e.g., aspects of our project work) does the project team access collaboratively?
- How do we want to organize our sub-folders? By year? by quarter? by document type?
- Are administrative documents accessible to the full team? Or do they need to be in a separate location?
- If we have subcontractors or vendors, are their shared folders we will need to create?

A Note from our Operations Department: We recommend organizing your files in alignment with how your team collaborates. Below is an example that worked for our teams.

Example: Grant Folder Structure

```
[Grant Name]/
├──── 1. Admin (contract, scopes of work, budget documents)
├──── 2. Project Overview (grant narrative, project-specific literature)
├──── 3. Deliverables (reports, formal submissions made to funder)
├──── 4. Meetings (meeting notes, slide decks)
├──── 5. Data (spreadsheets, analysis, qualitative data)
```

D. Create a running notes document to capture program insights.

Set up a shared document where staff can regularly record updates from meetings or check-ins, ranging from successes, challenges, and any changes made during implementation to data analysis processes and analysis decisions. This often works best as a simple document that multiple people can access in real time (e.g., a Google Doc or a Microsoft Word document on a SharePoint site), so notes can take place during any internal or external check-in.

Pro Tip

Consistency is everything. Keeping these systems up to date throughout the reporting period helps prevent data backlogs and makes reporting much easier. It is also important that all relevant team members can easily access and use these tools to ensure information is captured consistently. If you are operating as a "team of 1", adding a calendar reminder to update the running notes with important context and/or check the data can be helpful in staying on track.

3. Capture Program Insights Throughout the Reporting Period

Now that you've set up your data tracking systems, it's time to gather insights! We recommend taking these extra steps to capture additional insights and really use the data to drive process improvements and make strategic decisions. Regularly reviewing and discussing your data as a team, alongside documenting successes, challenges, and program adjustments, helps ensure you can clearly explain what is happening "behind the numbers" when it is time to report.

A. Schedule regular check-ins with program staff.

Hold brief, recurring meetings (e.g., weekly, bi-weekly, or monthly) to review program data and discuss program progress, challenges, and opportunities for improvement. Meetings may be more frequent at the start of the grant and can be adjusted over time, as systems are used consistently.

Questions to ask yourself

- What stands out in our data right now?
- Are there any patterns or trends we should pay attention to?
- What might be contributing to these results?
- Are there changes we want to test based on what we're seeing?

B. Document key updates as they occur.

Use your running notes, mentioned in section 2 C., to capture important information from meetings to day-to-day work, including:

- Successes or milestones
- Challenges or barriers
- Changes or adaptations made to the program.

Remember, this is your internal documentation, so bullet points and phrases are absolutely sufficient, as long as they can be understood by other team members.

Why this matters

Many funders require reporting on successes, challenges, and lessons learned within narrative sections. This information may also be used in continuation or renewal applications to demonstrate progress, identify areas for improvement, and justify ongoing funding. Capturing these insights throughout the reporting period makes it much easier to develop strong, accurate narratives later.

Example: Running Notes Format

Programs may maintain a simple running notes document to capture key information throughout the reporting period. Notes can be recorded in bullet format and do not need to be formal.

- Each entry may include:
- Date
- Activity or meeting title/purpose (e.g., Internal team check-in)
- Individuals in attendance
- Key updates or progress
- Successes
- Challenges
- Adaptations or next steps

Notes can be captured using a shared document, meeting notes, or even audio recordings (e.g., Zoom notes or recordings), as long as key information is documented and accessible.

Phase 2- Report Creation

4. Develop the Report Structure and Outline

Before working with your data, decide how your report will be organized and/or what evaluation questions you will be answering. A clear structure helps ensure your data, narrative, and grant requirements align from the start.

A. If applicable, review any required report format or guidance.
   Check the Notice of Award, reporting guidelines, or funder templates to confirm if specific sections, formats, or submission platforms are required.

B. Identify your primary audience(s) and the intended use of the report.
   Consider who will be reading and using the report (e.g, funders, program staff, community partners, board members). Identifying your audience early can help guide how the report is structured.

Questions to ask yourself

- How familiar is your audience with the program?
- What level of detail will be most useful to them?
- What format would best support how they will use the report?
- What key information will matter most to the audience?

C. Select an older report format, adapt an organizational format, or create a new report template.

The template should outline the main sections of the report.

At a minimum, most reports include:

- Project overview and goals
- Progress towards goals and/or outcomes
- Successes and challenges
- Recommendations or next steps

See the BSRI Grant Report Template for further explanations and examples of each section:

D. Map where each data point will be presented.
   Once you've confirmed exactly what data must be included by reviewing the Notice of Award (NOA) in Section 2, identify all required metrics, outputs, and outcomes you committed to tracking (often found in a logic model). Consider mapping each required data point to a specific section of the report (e.g., enrollment data to the project progress section) to ensure all required information is included and avoid duplication, making the report easier to follow. This is especially helpful when multiple members are contributing to the report.

E. Determine where narrative explanation is needed.
   Identify which sections will require written explanation to provide context, explain the data, or describe program implementation.

Key Terms

- **Metrics/Indicators:** These are the specific data points you track and report. They show how you measure progress.
  - Examples: number of participants served and follow-up completion rate.
- **Outputs:** These describe what your program does- the activities and services delivered.
  - Examples: number of workshops held, # and types of services provided.
- **Outcomes:** These describe the changes your program produces. Taken together, the outcomes reflect impact.
  - Examples: improved mental health symptoms, reduced substance use, increased employment.

5. Compile and Prepare Outcome and Evaluation Data

Before drafting the report, gather and prepare all required data identified in Section 4. Think of this step as organizing everything into one clean, reliable place before you begin writing.

A. Pull the data into one location

Start by gathering all relevant data from wherever it is currently stored (e.g., spreadsheets, databases, tracking tools, or forms). Create one final reporting working file or folder where all data for this reporting period will live and label it accordingly (e.g., Year2 Q1report).

At a minimum, this should include:

- Participant enrollment (intake) data
- Services delivered or activities completed
- Follow-up data (if required)
- Any outcome measures required by the grant

B. Ensure the data is complete.

Double-check that your data covers the entire reporting timeframe (e.g., all months in the quarter or year). Ask yourself:

- Are any months missing?
- Are there any participants or activities that haven't been entered yet?

If anything is missing, update your data before moving forward.

Each funder is unique, and some reports may ask you to report cumulative data through the reporting period (e,g., all participants served from the onset of the grant); whereas some may only want the specific individuals served in a specific time frame (e.g., only those enrolled during year two, quarter one). If you are unsure, ask the funder or project officer.

C. Clean the data.

Review your dataset row by row (or record by record) to clean it up. BSRI data teams always make a duplicate file to clean so we retain the original "raw" data in case we make a mistake.

Look for:

- Blank fields where data should be filled in
- Duplicate entries for the same participant or activity
- Obvious errors (e.g., incorrect dates, unrealistic values)

Make corrections where possible, or flag items that need follow-up.

D. Organize the data.

After cleaning your data, organize it in a simple, consistent way so you can quickly summarize and analyze results for reporting. This step focuses on preparing your dataset for analysis and reporting, especially when working with exported or compiled data from multiple sources.

For example:

- Keep a clean, unedited version of your original dataset and make a copy before making changes for reporting or analysis
- Standardize column names and formats, especially when working with downloaded or merged datasets (e.g., aligning date formats, simplifying field names)
- Keep one row per participant or service record
- Group similar data together (e.g., enrollment data in one sheet, outcomes in another)

This step will make creating tables and visuals much easier later.

E. Calculate key totals and basic summaries.

Using your cleaned data, calculate the main numbers you will report.

This may include:

- Total participants served
- Number of services delivered
- Number of follow-ups completed
- Percentages or rates (e.g., completion rate, outcome improvement)

If you're unsure how to calculate something, start simple—totals and basic percentages are often sufficient for most reports.

F. Compare the results to the targets.

Look back at the goals or targets identified in Section 4 and compare them to your actual results.

Ask:

- Did we meet our targets?
- Where did we exceed expectations?
- Where are we falling short?

Make note of these observations; you will use them later in your narrative sections.

Need additional support with data structure?
For more detailed guidance on organizing, cleaning, and structuring your data, see our Data Infrastructure Starter Guide, along with other resources found on our impact hub!

6. Prepare Data Tables and Visuals (if required or appropriate)

Once the data is cleaned and summarized (Section 5), the next step is to present it clearly and in an organized way, using tables or simple visuals.

A. Start with simple tables.
Create basic tables that clearly display your key data.
At a minimum, include:
- Totals (e.g., number of participants served)
- Comparisons to targets (e.g., target vs. actual)
- Data across time (e.g., by month or quarter, if applicable)

Tables are sometimes required and are an effective way to present accurate information.

B. Add visuals if they explain the data.
If helpful, create simple charts to show trends or changes over time.
For example:
- Bar charts to compare targets vs. actual results
- Line graphs to show progress across months or quarters

If your grant requires it, prepare additional tables such as:
- Demographic summaries (e.g, age, gender, race/ethnicity)
- Outcome breakdowns (e.g, changes from baseline to follow-up)

C. Label everything clearly.
Make sure all tables and visuals are easy to read and understand.
Include:
- Clear titles (e.g., "Participant Enrollment by Quarter")
- Labels for rows, columns, and axes
- Timeframes (e.g., reporting period)

Someone unfamiliar with your program should be able to understand what they are looking at without any confusion.

Pro Tip

- Only include visuals if they make the data easier to understand, not more complicated.
- Ensure each table or visual matches the section where it will appear (as planned in Section 4).
- Avoid repeating the same data in multiple places unless necessary.
- Refer back to the NOA or reporting guidance to see what is required as needed.

See our Grant Report Template for further examples on visuals

7. Prepare the Narrative Section

Now that the data tables and visuals are complete (Section 6), the next step is to explain what the data means. This is where you tell the story of your program using both the data and the insights captured throughout the reporting period (see Section 3) in alignment with your reporting needs as discovered in Section 1.

A. Start with the project overview.
Briefly describe the purpose of the program, who it serves, and what it aims to achieve. This should align with the goals and objectives outlined in the grant.

B. Summarize progress using your data.
Use your tables and calculations to describe what happened during the reporting period.
For example:
- How many participants were served?
- Did enrollment increase or stay consistent over time?
- Were targets met or exceeded?

C. Highlight success/milestones.
Use your running notes (Section 3) to identify key achievements.
This may include:
- Programs or activities that worked well
- High engagement or participation
- Progress toward goals

Be specific and connect these successes to your data when possible.

Optional AI Support

If you have been consistently capturing notes throughout the reporting period, you can use AI tools (e.g., ChatGPT) to help draft initial summaries. For example, you might paste or upload sections of your running notes and ask: "Can you summarize key successes or milestones from this information?"

This can help you quickly identify themes or draft bullet points, but be sure to review and refine the content to ensure accuracy and alignment with your data.

D. <u>Describe challenges and how they were addressed.</u>

Explain any barriers encountered and what actions were taken in response.

For example:

- Lower-than-expected participation
- Delays in services or follow-ups
- Staffing or operational challenges

E. <u>Connect the results back to goals and objectives and explain why the results matter.</u>

Clearly link your data and observations to the goals outlined in the grant.

For example:

- "These results demonstrate progress toward Goal 1.1 (participant enrollment), which indicates the program is well-received by the community."
- "Improvements in follow-up completion support Goal 1.3 (outcome improvement)."

Keep this clear and straightforward, and avoid overcomplicating to showcase alignment with the funder's expectations.

Pro Tip

Write as if you're explaining the program to someone unfamiliar with it. Focus on clarity over complexity. Your goal is to make the data easy to understand, not to include every detail.

- Use short, direct sentences
- Lead with key findings
- Avoid repeating numbers already shown in tables

See our Grant Reporting Template for further explanations on sections

8. Conduct Final Review Before Submission

Before submitting your report, review it carefully to ensure it is complete, accurate, and aligned with the funder's expectations. This step helps catch errors, inconsistencies, and missing information.

- **A.** Review the funder requirements (NOA or reporting guidance) and ensure all required sections, tables, and attachments are present.
- **B.** Ensure the data and narrative match. Cross-check the data visuals and narrative sections to confirm they tell the same story.
- **C.** Review the data and visuals for clarity (clear labels, formatted correctly).
- **D.** Do a final read-through to check for typos or grammatical errors, unclear language, and overall flow and readability.

Optional AI Support

You can use AI tools (e.g., ChatGPT) to help proofread and improve clarity. For example, you might paste sections of your report and ask: "Can you check this for grammar, repetition, and clarity?" or "Can you make this paragraph clearer and more concise?"

This can help identify issues you may have missed, but always review suggested edits to ensure accuracy and alignment with your intended meaning.

Pro Tip

Have another team member review the report before submission. A fresh set of eyes can often catch errors, inconsistencies, or unclear language that may have been overlooked.

Phase 3 - Share and Use Findings

9. Disseminate and Use the Report

After completing and submitting your report, consider how the findings can be shared and used. Reports are most valuable when they inform decisions, support program improvement, and communicate impact to key audiences.

A. Revisit your audience(s), including who will use or benefit from the report (e.g., funders, program staff, organizational leadership, community partners or participants).
Consider how familiar each audience is with the program and what level of detail they will need.

B. Adapt the report for different uses (if needed). For example, you may want to create shorter or more accessible versions for different audiences. Examples could include executive summaries, one-pagers, presentations/slide decks, and social media content. Focus on the most relevant findings for each audience.

C. Even if you don't adapt the report, share results with program staff and partners to support learning and improvement. Creating space to review and discuss findings as a team can help identify what is working well, what challenges are emerging, and where adjustments may be needed to strengthen the program.

Optional AI Support

AI tools (e.g., ChatGPT) can help quickly adapt your report into different formats for specific audiences. For example, you might paste a section of your report and ask: "Can you help me turn this into a one-page summary for community partners?" or "Can you help merewrite this as a short presentation or executive summary?"

This can save time when creating multiple versions of your report, but be sure to review and tailor the content to match your audience and key messages.

Pro Tip

- Before sharing any data publicly, ensure that all information is de-identified, meaning that it does not include personally identifiable information, to protect your clients, participants, or community. This is of high ethical importance.
- You don't need to share everything. Focus on the findings most useful and meaningful to each audience. Tailoring your message will make your report more impactful.

Appendix
Grant Reporting Template

PURPOSE

This template provides a structured format for preparing grant reports. Sections may be adapted based on funder requirements, but most reports should include:

- Project overview and goals
- Narrative summary of progress
- Outcome data and analysis
- Recommendations for improvement

Use case

You have grant funding that requires you to report on progress and outcomes at specific intervals (e.g., quarterly, semi-annual, annual).

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ABOUT THIS DOCUMENT

BSRI developed this template based on our experience supporting partners in navigating complex grant reporting requirements. We designed it to provide a clear, adaptable structure that reduces reporting burden while helping organizations communicate their progress, demonstrate impact, and use data for learning and improvement.

USE OF ARTIFICIAL INTELLIGENCE (AI)

Our organization utilizes artificial intelligence (AI) tools to enhance efficiency, support data analysis, and strengthen evaluation practices. We also encourage our partners and clients to thoughtfully explore AI as a means to build future-ready evaluation capacity.

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BEHAVIORAL SCIENCE RESEARCH INSTITUTE

Organization Name
Project/Grant Name
Grant Number (optional/if applicable)
Report Type (e.g., annual, semi-annual, quarterly)
Reporting Period (e.g., October 1, 2025 - December 31, 2025)

> This information helps readers quickly identify the report and the grant it relates to. Always use the official project title used in the grant agreement or Notice of Award (NOA).

PROJECT OVERVIEW

> This section provides a brief overview of the project, including its purpose, target populations, and the primary services or activities implemented. This can be pulled directly from the grant narrative. This section will often remain the same across reports.

Sample Language

The [Project Name] is designed to address [brief description of the issue or need] among [target population] in [geographic area]. Through this initiative, [Organization Name] provides [key services or interventions, such as treatment services, prevention programming, case management, outreach, or training] to support improved outcomes for participants.

Goals and Objectives

> Goals and objectives define the project's intended outcomes and guide the report's content. Most grant reports should reference these goals throughout the narrative to demonstrate progress and compliance with grant requirements. Goals and Objectives are located in the NOA.

Sample Language

Goal 1: Increase engagement in recovery-oriented services for medically underserved individuals.

- Objective 1.1: Enroll at least 100 participants annually.
- Objective 1.2: Provide coordinated care and referrals to essential services.
- Objective 1.3: Improve mental health and recovery outcomes among participants.
- Objective 1.4: Achieve a [96%] six-month follow-up completion rate among eligible participants.

> **Why this section matters**
>
> The goals and objectives are the foundation of the report. They determine:
> - What activities should be described
> - What data should be presented
> - How outcomes should be interpreted
>
> Many funders will review reports specifically to determine whether these objectives are being met.

PROJECT PROGRESS

> This section summarizes the major program developments during the reporting period and describes the project's progress toward its goals and objectives.

Successes

> This section describes key achievements, milestones, or notable program accomplishments during the reporting period.
>
> These may include:
> - Meeting or exceeding enrollment targets
> - Successful implementation of services
> - Improvements in participant outcomes
> - Strengthened partnerships or program innovations

Sample Language

- The program exceeded its annual enrollment target by serving 121 participants.
- Participants demonstrated improvements in several outcome indicators at follow-up.
- Coordination between partner organizations strengthened service delivery.

Challenges and Opportunities

This section describes barriers or challenges encountered during the reporting period and how the program team responded to them.

Examples may include:
- Staffing transitions
- Participant engagement challenges
- Referral pipeline issues
- External policy or funding changes

This section could also highlight adaptations or opportunities for improvement.

Sample Language

- Some participants faced challenges maintaining engagement due to work conflicts. In response, the program introduced more flexible scheduling options, including evening sessions and adjusted appointment times, thereby improving participant retention.
- The team experienced slight intake shortfalls in Q1 and Q4. To address this, staff strengthened referral pipelines by increasing outreach to partner organizations and refining referral processes, positioning the program for more consistent enrollment moving forward.

Why this section matters

This section serves as a narrative summary of the reporting period. It allows the report to capture important program context that may not be reflected in quantitative data alone. This section also supports reasons the program may not be meeting targets and objectives. Funders often look to this section to understand how programs are adapting and responding to real-world challenges.

Project Findings

This section summarizes the overall data from the project and focuses on both process data (e.g., numbers served, activities) and on outcomes data (e.g., changes in key indicators). In some cases, it might make sense to aggregate data into subsections of demographics, quantitative, and qualitative data. In other cases, describing data by integrating numbers and stories may be the preferred format. This section is designed to be flexible to meet the needs of the grantee and funder.

Demographic Information

Demographic reporting is commonly included in evaluation reports to demonstrate that programs are reaching the intended population, as mentioned in the NOA. This may include participant characteristics such as age, gender, race/ethnicity or language.

Sample Section

Among the x participants, x% identified as female and x% as male. Most participants identified as White (x%), followed by Black or African American (x%), and Other (x%); no respondents identified with other racial categories. X (x%) identified as Hispanic, while x% were Non-Hispanic. The majority were aged x–x years old (x%) or x–x years old (x%).

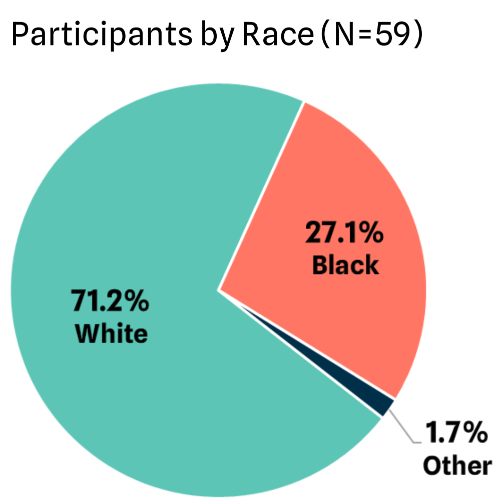

Figure 1a. Demographics: Race and Ethnicity (n = X)

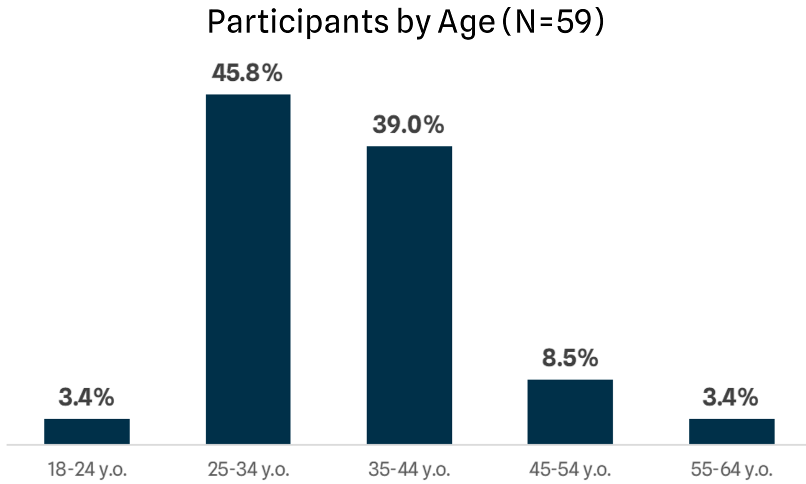

Figure 1b. Demographics: Age (n = X)

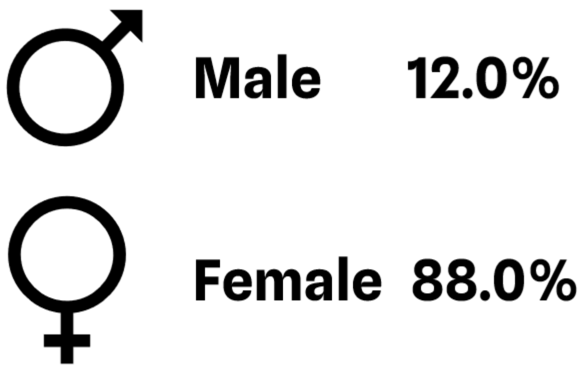

Figure 1c. Demographics: Gender (n = X)

The demographic profile of Year 1 participants reflects a program that is reaching its intended population, particularly Hispanic/Latinx adults and individuals in the 25–44 age range. These trends align with regional population characteristics and the grant's focus on improving access to trauma-informed, family-centered services for parents and children involved in the dependency treatment court system.

Pro Tip: Visuals are optional

Tables and charts can help present data clearly and break up large chunks of text, but they are not required unless specified by the funder. The primary goal is to clearly communicate your program's progress and outcomes.
If time or capacity is limited, you can:

- Describe key numbers in a short paragraph
- Include simple tables instead of charts
- Use screenshots from reporting systems (e.g., SPARS, EHB) when appropriate

OUTCOMES

This section presents changes over time in indicators related to the project's goals and objectives (e.g., mental health, substance use, youth development, or other key outcomes). Depending on the grant requirements, this may include standardized measures (e.g., National Outcome Measures [NOMs]) or other outcome indicators collected at multiple time points (e.g., baseline and follow-up). Qualitative data may also be used to highlight participants' or groups' experiences. All outcomes should demonstrate progress toward the project's intended results.

Quantitative Findings

Sample Quantitative Summary

Program data across the reporting period indicate steady progress toward enrollment goals, specifically Objective 1.1 (enroll at least 100 participants annually) under Goal 1. A total of 32 participants were served, achieving 91.4% of the cumulative annual target (see Table 2). Enrollment peaked in Quarter 2, exceeding targets (122.2%), and remained consistent across subsequent quarters, reflecting sustained program reach.

Low discharge numbers suggest that participants are remaining engaged in services, supporting Objective 1.2 (provide coordinated care and referrals to essential services). Follow-up completion varied across quarters, with higher completion among participants enrolled earlier in the year and lower completion in later quarters, likely due to the timing of eligibility. Relative to Objective 1.4 (achieve a 96% six-month follow-up completion rate among eligible participants), follow-up completion indicates an area for continued improvement. Overall, these findings suggest that the program is making strong progress toward Goal 1, with opportunities to further strengthen follow-up completion and support continued improvement in participant outcomes (Objective 1.3).

Table 1. Total Intake, Discharge, and Follow-Up Interviews Completed Grant Year One.

Grant Year	Month	Number of Intakes	Number of Discharges*	Number of Six-Month Follow-Ups
FY1 – Quarter 1	Oct 2024 – Dec 2024	6	3	5
FY1 – Quarter 2	Jan 2025 - Mar 2025	11	1	10
FY1 – Quarter 3	Apr 2025 - Jun 2025	8	1	2
FY1 – Quarter 4	Jul 2025 - Sept 2025	7	0	0
Total	Oct 2024 – Sept 2025	32	5	17

Table 2. Rate of Completion for Grant Year One.

Grant Year	Target	Number of Intakes Completed	Rate of Completion
FY1 – Quarter 1	9	6	66.7%
FY1 – Quarter 2	9	11	122.2%
FY1 – Quarter 3	9	8	88.9%
FY1 – Quarter 4	9	7	77.8%
Cumulative Target-to-date	35	32	91.4%

Sample Sections

National Outcome Measures (NOMS)

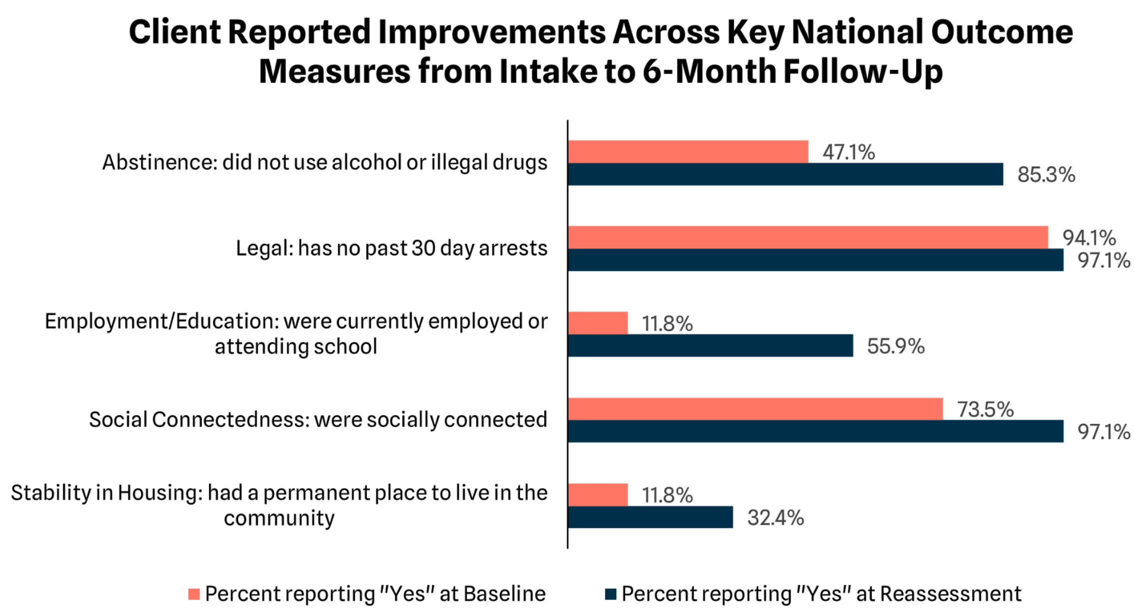

Figure 1. Client-Reported Improvements Across National Outcome Measures (NOMS) from Intake to 6-Month Follow-Up

Outcomes were measured by comparing client responses to sections of the NOMs at baseline to those at six months. Figure 1c shows substantial improvements across most outcome domains from intake to the 6-month follow-up period. Abstinence increased markedly, with the proportion of participants reporting no alcohol or illegal drug use rising from 47.1% at intake to 85.3% at follow-up. Legal stability was already high at intake (94.1%) and improved slightly to 97.1%, indicating consistently low recent arrest rates.

Employment or educational engagement showed the most significant gain, increasing from 11.8% at intake to 55.9% at follow-up. Social connectedness also improved strongly, rising from 73.5% to 97.1%. Housing stability also improved, with the percentage of participants reporting a permanent place to live increasing from 11.8% at intake to 32.4% at follow-up.

Overall, the results suggest meaningful positive changes over time, particularly in abstinence, employment/education, social connectedness, and housing stability.

Mental Health Outcomes (MHO)

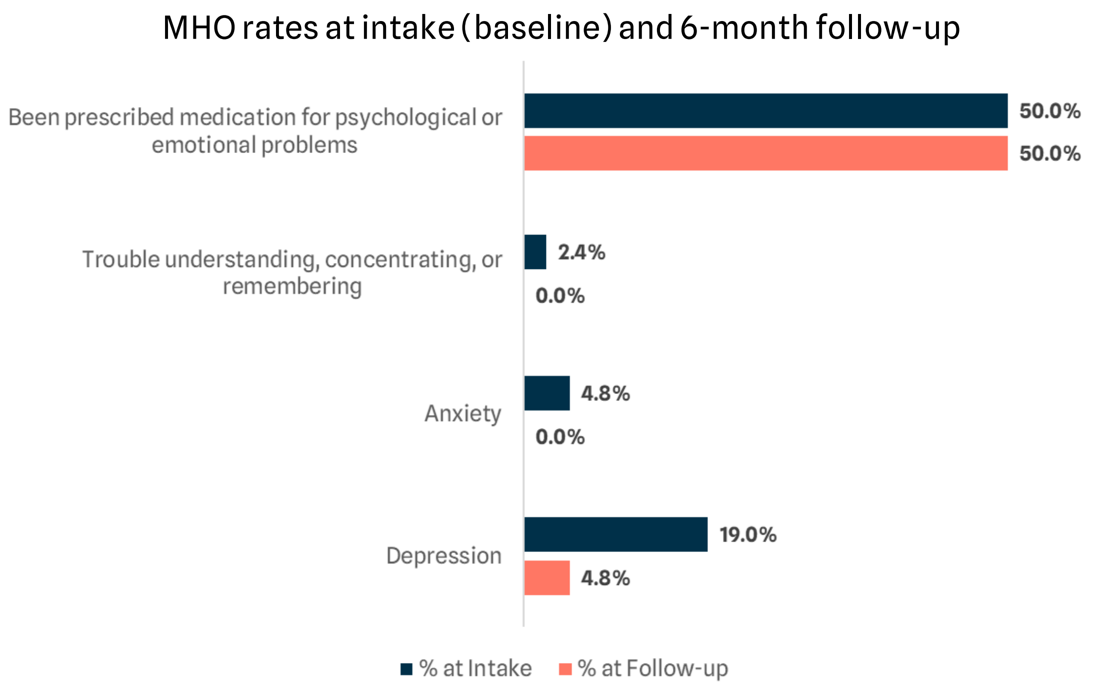

Figure 1. Client-Reported Improvements Across Mental Health Outcomes (MHO) from Intake to 6-Month Follow-Up

Mental health outcomes were assessed by comparing participant responses at intake and at the six-month follow-up. As shown in the figure, the proportion of participants reporting depression decreased notably from 19.0% at intake to 4.8% at follow-up, indicating improvement in depressive symptoms over time. Similarly, reports of anxiety and trouble understanding, concentrating, or remembering were low at intake (4.8% and 2.4%, respectively) and were no longer reported at follow-up, suggesting positive changes in these areas.

The proportion of participants prescribed medication for psychological or emotional problems remained stable at 50.0% from intake to follow-up, which may reflect continued access to and engagement with mental health treatment. Overall, these findings suggest improvements in key mental health indicators over time, particularly in reductions in depression and other reported symptoms.

Drug Use Outcomes

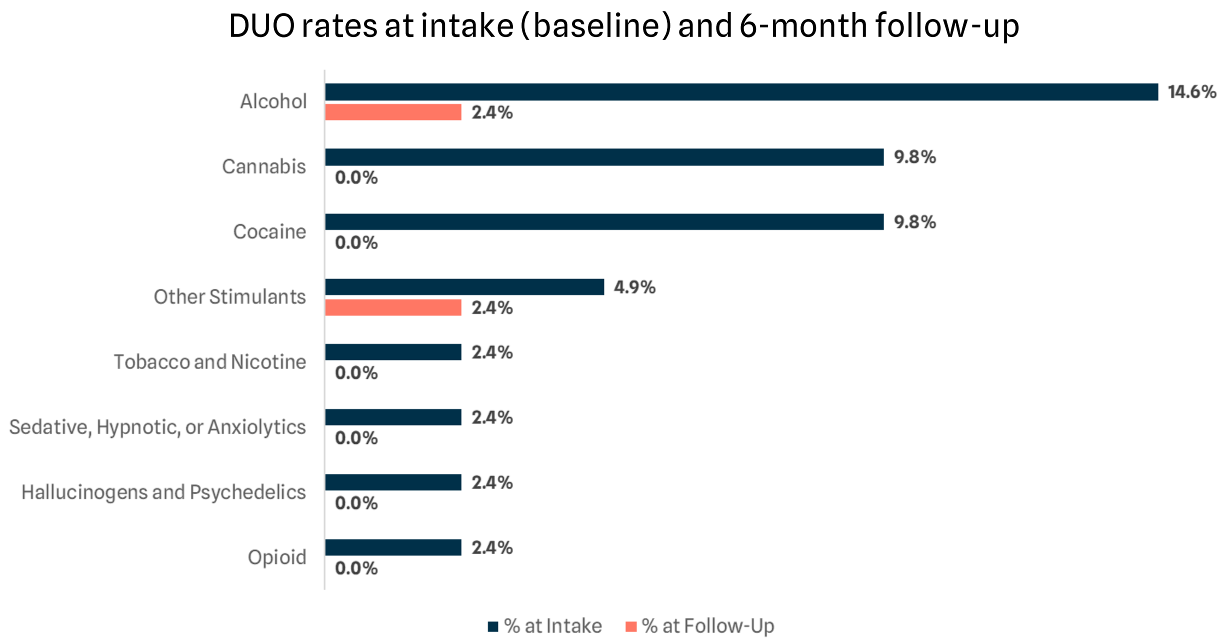

Figure 3. Client Drug Use Outcome (DUO) rates from Intake to 6-Month Follow-Up

Drug use outcomes were measured by comparing self-reported substance use at intake and at the six-month follow-up. Overall, decreases were observed across several substances. Alcohol use declined substantially from 14.6% at intake to 2.4% at follow-up, indicating a meaningful reduction in use. Similarly, use of other stimulants decreased from 4.9% to 2.4%, while cannabis and cocaine use, reported at 9.8% at intake, were no longer reported at follow-up.

Use of tobacco and nicotine, sedatives, hallucinogens, and opioids was minimal at intake (2.4% or lower) and remained low or was not reported at follow-up. These findings suggest overall reductions in substance use across multiple categories, with the most notable declines observed in alcohol, cannabis, and cocaine use. Together, the results indicate positive changes in substance use behaviors over time among participants.

Qualitative Findings

This section presents qualitative insights that provide additional context to program implementation and outcomes. These insights may include participant feedback, staff observations, or themes identified through interviews, focus groups, or open-ended responses. Remember to never include information that would violate an individual's confidentiality.

Sample Qualitative Summary

Participants highlighted the importance of peer support services, noting that peers play a critical role in building trust, facilitating connections to care, and supporting individuals navigating complex systems. Peer staff were described as flexible and responsive, often complementing clinical services through relationship-based support.

However, some participants also noted challenges, including unclear role expectations and instances where peer staff were asked to perform duties outside of their intended scope. Concerns were also raised about stigma and misunderstanding of the peer role within organizations.

> The value of the peer role needs to be expressed to all organizations because we are an enhancement. We are not there to take someone's job, and the discrimination and stigma doesn't always come from the outside; sometimes it can come from within.
>
> **- Peer Support Specialist**

NEXT STEPS AND RECOMMENDATIONS

This section provides recommendations based on the findings in the report. Recommendations should focus on practical improvements the program staff or partners can implement.
Recommendations should be:

- Feasible
- Actionable
- Tied to findings in the report

Sample Section

Improve follow-up interview completion through enhanced outreach methods

Programs can improve follow-up completion by implementing multiple outreach strategies such as reminder calls, text messages, emails, and flexible scheduling. Engaging peer specialists or case managers in outreach efforts may also help maintain contact with participants who are difficult to reach.

Strengthen referral partnerships to maintain consistent enrollment

Maintaining strong relationships with referral partners helps ensure a steady flow of eligible participants into the program. Regular communication, coordination meetings, and clear referral processes can help partners understand program eligibility and improve the efficiency of referrals.

Expand housing support services to address stability barriers

Housing instability can significantly impact participant engagement and recovery outcomes. Programs may consider strengthening partnerships with housing providers, connecting participants to community housing resources, or incorporating housing navigation support to help participants secure stable living environments.