



Opportunity Fund 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 Opportunity Fund 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.



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 a short paragraph the key outcomes achieved during the grant term. Where relevant, describe any significant events that affected your ability to meet the goals you set out in your proposal.
- 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.



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.



Other supporting materials

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