

## Grant Management Overview

Congratulations! We've approved your grant. You and your foundation grant team have aligned on the grant's goals and how to achieve these goals. Now your work transitions into the implementation phase. You will now engage with your grant team to understand the grant progress and how to adapt to real-time conditions, potential changes to project direction and more. This overview describes what you can expect while your grant is active.

### Managing the Grant

The outcome, payments and requirements plans and the budget that you created during the grant development process are the core management tools of the grant. We attach these documents to the grant agreement. These tools will help you with your internal project oversight to track progress and spending. The documents also become the basis for your narrative and financial reports to communicate grant progress to your grant team.

### Modifying Plans

The realities of implementation often translate into changes in plans, schedules and budgets. While we value the discipline of planning for clarity and alignment, we recognize the need to be flexible during implementation to maximize your project's impact. Your grant team will discuss the parameters for modifications with you.

### Reporting on the Grant

Each grant requires one or more narrative and financial reports; some grants have additional reporting requirements. The narrative and financial reports describe progress with regard to the grant's core goals and specifically the outcome plan and the budget. You and your grant team will discuss the appropriate level of detail of your reports.

#### 1. Narrative report

The narrative report describes:

- What has been achieved and the significance of these results in advancing the goals of the grant (in the form of a one to two page summary)
- Progress that has made toward the completion of each of the grant's outcomes or outputs described in the outcome plan

Any additional narrative reporting information as agreed upon with your grant team

#### 2. Financial report

The financial report includes:

- An Excel spreadsheet showing actual versus budgeted spending of the grant funds both at the end of the reporting period and cumulative across the life of the grant (NOTE: Please do not send a PDF.)
- Any interest earned on grant funds as of the end of the reporting period and cumulative across the life of the grant
- An explanation of any variances in expense subcategory over \$10,000 and that are between 10 to 20 percent of the subcategory amount (expense subcategories refer to the

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- subcategories of direct costs such as personnel, consultants and contractors, subgrants and other direct expenses)
- An explanation and request for approval of any future variance in expenses category over \$10,000 and that are greater than 20 percent

Please submit your reports electronically.

Your grant team reviews your narrative and financial reports and follows up with you on any questions. These reports become the basis of subsequent payments. That means that any delays in reporting will likely result in a delay of payment. If you anticipate a delay in report submission, please contact your grant team in advance to discuss and resolve project implications.

### **Grant Publicity**

Many grantees choose to communicate with targeted audiences and the general public about the work that they are doing with funding from the Gordon and Betty Moore Foundation. Sharing stories about the work through media relations, social media and other approaches can create awareness about how grantees are creating change. If your organization chooses to communicate about this work and acknowledge the Gordon and Betty Moore Foundation, we encourage your team to do so. Your grant agreement includes boilerplate language that you can use if you choose to mention the foundation. If you would like a logo or additional information, please contact our communications department at 650.213.3000 or [communications@moore.org](mailto:communications@moore.org).

### **Your Grant Team**

Your foundation grant team includes your program officer, who is your primary contact, program associates and grants administration staff. Please contact your program officer with any questions you might have.