



TWO SIMPLE STEPS

Doing Good, Done Better

1 EXPORT

A COMPLETE LIST OF YOUR MOST RECENT GRANTS IN EXCEL

Most grants management software platforms offer a pre-formatted export function that pulls the necessary data into an Excel file automatically.

- To find instructions for your platform, visit foundationcenter.org/ereporting/partners

If you do not use one of the listed software systems, you can simply export a complete list of your most recently-awarded grants into our Excel template.

- To download the template, visit foundationcenter.org/ereporting/egrant

2 E-MAIL

YOUR REPORT TO EGRANTS@FOUNDATIONCENTER.ORG

Please indicate your regional association in the subject line of your e-mail.

Example

Subject: [organization name] eGrant Report – [regional association name]

MAKE THE MOST OF YOUR DATA!

Use as many of the fields in the template as possible. At a minimum, include the fields in the “must have” list on the following page.

For any questions, contact:

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eREPORTING STANDARD

DATA PRIORITIES

1. MUST HAVE

Grant Details

- Unique Transaction ID
- Amount (paid/authorized)
- Currency
- Fiscal Year End

Recipient Details

- Name
- Address

2. PREFER TO HAVE

Grant Details

- Grant Description
- Geographic Area Served
- Grant Program Area
- Grant Subject(s)/Activity(ies)
- Grant Population(s) Served
- Grant Support Strategy(ies)
- Duration
- Grant Start Date
- Grant End Date

3. LIKE TO HAVE

Grant Details

- Transaction Type
- Grant Title
- Fund Name
- Fund Type
- Fund Sub-Type
- Grant Outcome
- Grant Outputs
- Grant Shared With
- Grant Made With

Recipient Details

- EIN or Intl. Registry Number
- Organization Type
- Subject(s)/Activity(ies)
- Population(s) Served
- Strategy(ies)
- URL
- Fiscal Agent Name
- Recipient's 3rd Party ID-Description
- 3rd-Party ID
- Unit/Department/Chapter
- Mission Statement
- E-mail Address
- Also Known As (AKA)
- Doing Business As (DBA)
- Formerly Known As (FKA)
- Telephone
- 2nd Address
- Additional Notes
- Name to use for Grants to Individuals