



# TWO SIMPLE STEPS

Doing Good, Done Better

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## 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](https://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](https://foundationcenter.org/ereporting/egrant)

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## E-MAIL

YOUR REPORT TO [EGRANTS@FOUNDATIONCENTER.ORG](mailto: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.

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For any questions, contact:

[egrants@foundationcenter.org](mailto:egrants@foundationcenter.org)





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# eREPORTING STANDARD

## DATA PRIORITIES

### 1. MUST HAVE

#### Grant Details

- Transaction ID (if available)
- Amount (paid/authorized)
- Currency (if not \$USD)
- Fiscal Year

#### Recipient Details

- Name
- Address

### 2. PREFER TO HAVE

#### Grant Details

- Description
- Program Area
- Geographic Area Served
- Title
- Subject(s)
- Population(s) Served
- Support Strategy(ies)
- Transaction Type
- Duration in Months
- Outcomes

#### Recipient Details

- EIN or Intl. Registry Number
- URL or Web Address
- Fiscal Sponsor
- Grant Shared With
- Grant Made With

### 3. LIKE TO HAVE

#### Grant Details

- Start Date
- End Date
- Fund Name
- Fund Type
- Fund Sub-Type

#### Recipient Details

- Telephone
- E-mail Address
- Also Known As (AKA)
- Doing Business As (DBA)
- Formerly Known As (FKA)