

Washington AIDS Partnership

Tips for Preparing Interim and Final Public Policy Grant Reports

As an intermediary funder, the Partnership, like its grantees, needs to demonstrate the effectiveness of its public policy grant program to its own funders. Grantee interim and final reports are the most important sources the Partnership relies on to assess its grantmaking and to “make the case” to its funders on the effectiveness of its grant programs. We hope this tip sheet clarifies and simplifies the reporting process by eliminating or reducing the “guesswork” involved in deciding how much and what types of information to include in your interim and final public policy reports to the Partnership.

Remember: Answer each question of the report in the order that they appear. Answer each question separately. If a question is not relevant to your work, simply say so.

Context, Details, and Storytelling

- Indicate how specific activities carried out during the grant cycle have helped (or will help) you accomplish your public policy goals – e.g., if a new partnership was formed, tell us how that partnership will ultimately affect your policy work. Frame your activities in terms of how they help you get closer to fulfilling your goals; evidence of “strategic thinking” should be included throughout your report.
- Use “story telling” approaches – tell us the beginning, middle, and end of the story. If something is “groundbreaking,” “instrumental,” or “critical,” explain why. We know that your work builds on past gains; remind us of those to help us understand the work you are carrying out today. Likewise, write in concrete terms. Typically when you write a proposal you are telling us what you will do or could possibly do if you receive funding. When you are writing the interim and final reports, you are telling us what happened, what you accomplished, and if you did not accomplish something, you are telling us why. Because of this, you should write more concretely, providing vivid and supportive examples.
- Go beyond policy results and tell us about development of capacity and relationships. Changes in organizational advocacy capacity count. Constituency-based leadership development, community support, and increased networks are also important. Throughout the report, tell us how you are becoming more efficient, strategic, sustainable, and powerful in your public policy work.
- Be sure to tell us about the challenges and setbacks that occurred during this grant cycle, including how your current and future work might be affected. Also indicate your major lessons learned.
- Include past gains and successes in your next proposal! The reviewers do not see the interim or final reports. Your proposals should showcase your current and past public policy and related work.
- If you testified, indicate the topic of the testimony (what you were advocating for) and for which governmental committee.

- If you spoke at an event, provide the name and date of the event, the sponsoring entity, and a summary of who attended the meeting, in addition to the number of people or organizations in attendance (if you have that information).
- If you wrote a report or other written product, provide the name of that report and who received it (including available information on how many individuals read, viewed, visited, listened to it, etc.). Attach your policy recommendations or provide a summary of policy recommendations.
- Discuss challenges you have encountered during the grant period and how you overcame them (or are working to overcome them).

Numbers, Numbers, and Numbers

- Indicate the *number of outputs* – e.g., the number of meetings held or attended, individuals reached, testimonies submitted or provided, and coalition partners and partnerships.
- Include *important dates* – i.e., if an important meeting was held or a policy was adopted or implemented, provide the date or at least indicate if it occurred during this grant cycle.
- Provide information to support any “*increases*” by providing a percentage or exact number that states the extent of the change. Be sure to provide the timeframe for the change.
- Indicate the dollar amount if *funding* is allocated to your issue and indicate the extent to which funding increased (or, likewise, decreased).

Please find definitions for advocacy approaches, tactics, and strategies on the next page.

Definitions for Advocacy Approaches, Tactics, and Strategies

Advocacy Approaches, Tactics, and Strategies*	Definition
Research and policy analysis	Activities that include systematic data collection and analysis of a public policy. Data collection might include interviewing and surveying individuals, as well as conducting extensive analysis of census bureau data and other forms of information. The results from this effort are shared widely and used by the organization as well as other advocates.
Leadership development	Activities that raise the capacity, voice, and visibility of individuals within the community that are most impacted by the policy issue. Activities usually include training persons living with HIV/AIDS or other at-risk individuals to become actively engaged in advocacy process. Such activities might include training constituent leaders on the political process, lobbying, public speaking, and running an issue campaign. These individuals might be involved
Community mobilization	Activities that motivate, prepare, link, and mobilize individuals in support of the organization's advocacy positions and activities. Activities that involve the organization's community, network, or constituents advocating on policy issues. Rallies, demonstrations, lobby days, petitions and other sign-ons, and letter writing are common examples.
Combination of direct services and systems-changing strategies	Activities include providing services that fill major gaps in the system of HIV care, treatment, prevention, and support and thereby improve the total response to the HIV epidemic. These services and programs are usually the target of advocacy efforts.
Media and communications	Activities that involve developing and using messaging and using media/communications methods and approaches to publicize and advance public policy work. Activities that involve developing relationships with members of the media. Approaches may include the use of online, electronic, and print media.
Budget advocacy	Activities that will influence budget priorities and resource allocations. Monitoring the budget process and providing testimony (written or verbal) are common examples.
Other legislative advocacy to change current laws	Activities that seek to influence the content and passage of legislation.
Administrative advocacy with agencies to change policies or regulations or implementation of current laws	Activities that influence the development of regulations, executive orders, and other executive branch policy vehicles, as well as enforcement of the law.
Coalition and partnership work	Activities include developing and maintaining working relationships with individuals and/or organizations into a formal or informal collaborative structure in order to carry out agreed-upon common efforts, often involving advocacy. The organization is actively involved in a formal coalition and/or partnership.
Educational briefings and other work with elected and appointed officials	Activities include developing and maintain working relationships with elected and appointed officials that make or influence policy decisions, interpret and implement policies and programs related to the organization's issue area.
Outreach, awareness raising activities, and education	Activities that increase the general public's or particular section of the public's knowledge, attitudes, beliefs, and behaviors toward the organization's issue area. Activities might involve the use of media, popular education techniques, and social marketing campaigns, etc.
*Definitions come from a variety of sources including the Annie E. Casey Foundation and the Mosaica/Alliance for Justice Advocacy Evaluation Tool.	