Checklist: Data Reporting and Outcomes Tracking

Managing funding from multiple sources is one of the biggest challenges nonprofits face, especially when each funder has different rules, expectations, and reporting formats. Organizations must collect data, both to guide internal decision-making and to meet external reporting requirements. Aligning your internal data systems with funder requirements from the start is essential. A clear, consistent approach not only simplifies reporting but also strengthens your ability to demonstrate impact. The checklist below offers practical guidance to help you track, report, and use data for continuous improvement.

Grant Requirements

☐ What data and outcomes are required by the funder?

☐ Are there specific metrics, formats, or reporting timelines?

☐ Are qualitative outcomes (e.g., stories, testimonials) also needed?

☐ Are there compliance or audit requirements?

☐ What other data and outcomes do you want to track that are not required by the grant?

Program Goals & Objectives

☐ What are the intended short-term, intermediate, and long-term outcomes?

☐ Are these goals SMART (Specific, Measurable, Achievable, Relevant, Time-bound)? *(Review the Theory of Change: A Guide for Community Changemakers for further guidance on setting goals and outcomes)*

☐ How do these align with the funder's priorities?

Data Collection Plan

☐ What data needs to be collected (quantitative and qualitative)?

☐ Who is responsible for collecting it?

☐ How often will data be collected?

☐ What tools or systems will be used (e.g., spreadsheets, CRM, surveys)?

☐ Are you collecting the data in person or virtually?

☐ Do you and your partner organizations have a process in place to collect and report data?

☐ What tools or systems will be used (e.g., spreadsheets, CRM, surveys)?

☐ Do you need to develop additional forms or processes to collect the data you need (e.g., intake forms)?

☐ Are there baseline data or comparison groups you need to establish to support evaluation?

Indicators & Metrics

☐ What are the key performance indicators (KPIs) or Objectives and Key Results (OKRs)?

☐ Are specific output metrics required (e.g., number of participants)?

☐ Are specific outcome metrics required (e.g., change in knowledge, behavior, condition)?

☐ Do you need to disaggregate participant data by demographic group? (e.g., age, gender, location, attribute)?

Data Quality & Ethics

☐ Is the data collection (across partners) process consistent and high-quality?

☐ Are you protecting participant privacy and confidentiality? (Check the requirements by the funder or your organization's policy.)

☐ Do you have informed consent where needed?

☐ Are you following data security best practices?

☐ Do you have a process to ensure data can be validated (e.g., collecting specific documents, self-attestation)?

Analysis & Interpretation

☐ Who will analyze the data and how often?

☐ What methods will be used (e.g., statistical analysis, thematic coding)?

☐ How will you interpret and contextualize the results?

Reporting & Communication

☐ What are the reporting deadlines?

☐ What formats are required (narrative, dashboards, infographics)?

☐ Who are the audiences (funders, board, public)?

☐ How will you communicate success and lessons learned?

Continuous Improvement

☐ How will you use the data to improve the program?

☐ Is there a feedback loop with partners and stakeholders?

☐ Are there opportunities to share findings with the field?