PROGRAM FUNDING & REPORTING SYSTEM

A complete, maintainable process for turning funding requirements into evidence, decisions and defensible year-end reporting.

FICTIONAL DEMONSTRATION

This sample was created by BETWEEN POINTS to demonstrate the structure, thinking and level of finish that can be provided. It does not reproduce confidential information, employer-owned materials or a real client's records.

DEMONSTRATION CLIENT

Harbour Community Services · Community Access & Navigation Program

Funding period: April 1, 2026 to March 31, 2027 · Demonstration budget: CAD $180,000

WHAT IS INCLUDED

- Funding and program narrative aligned to the funding agreement
- One-page logic model connecting activities, outputs and outcomes
- Focused indicator framework with definitions, targets, sources and owners
- Reporting calendar and evidence plan
- Operational tracking workbook with budget, activities, participants and outcomes
- Year-end report structure with variance and outcome prompts

1. Program profile

A clear narrative that stays consistent across the application, delivery plan and year-end report.

PROGRAM PURPOSE

The Community Access & Navigation Program provides low-barrier support to residents who need help understanding and accessing essential community services. Staff offer scheduled appointments, drop-in navigation, outreach sessions and referral follow-up. The program is designed to reduce confusion, improve follow-through and help residents reach the right service sooner.

NEED BEING ADDRESSED

Residents often face fragmented information, unclear eligibility rules, repeated referrals and difficulty confirming what happened after a referral was made. Small organizations may also lack a consistent process for recording service volume, participant outcomes and evidence required by funders.

PROGRAM OBJECTIVE

To improve residents' ability to understand available services, complete referrals and resolve access barriers through practical navigation and coordinated follow-up.

CORE ACTIVITIES

Activity	Purpose	Delivery	Evidence captured
Navigation appointments	Clarify needs, options and next steps	In person / phone / virtual	Date, participant, issue, action, referral
Drop-in support	Provide immediate practical assistance	Scheduled drop-in hours	Attendance, service type, outcome
Community outreach	Reach residents who may not access office-based support	Partner locations and events	Session count, attendance, questions
Referral follow-up	Confirm whether the referral resulted in access	Follow-up within 10 business days	Status, barrier, resolution
Information workshops	Improve knowledge of programs and eligibility	Small-group sessions	Attendance, feedback, learning result

FUNDING-ALIGNMENT STATEMENT

USE IN APPLICATIONS AND RENEWALS

Funding will support staff time, outreach, participant transportation assistance, information materials, data collection and reporting. The program will track service volume, referral completion, participant understanding and recurring access barriers so that the organization can demonstrate both immediate results and opportunities for program improvement.

2. Logic model

A one-page results chain that keeps the program, indicators and reporting language aligned.

Inputs	Activities	Outputs	Short-term outcomes	Intermediate outcome
• Program staff • Partner relationships • Funding • Referral information • Tracking tools	• Navigation appointments • Drop-in support • Outreach sessions • Referral follow-up • Workshops	• Residents supported • Sessions delivered • Referrals initiated • Follow-ups completed • Tools distributed	• Participants better understand options and next steps • More referrals have confirmed outcomes • Recurring barriers are identified earlier	Residents access appropriate services more consistently and with fewer unresolved barriers.

RESULTS ASSUMPTIONS

- Participants are willing and able to provide basic follow-up information.
- Referral partners can confirm outcomes where appropriate and consent allows.
- The organization maintains consistent definitions across staff and reporting periods.
- The program has enough administrative capacity to review data monthly.

EXTERNAL FACTORS

Service availability, eligibility changes, housing and transportation barriers, staff turnover, community events and changing participant needs may affect results. These factors should be tracked as context rather than treated automatically as program failure.

DESIGN PRINCIPLE

The logic model is intentionally small. Every output and outcome should be measurable with tools the organization can realistically maintain.

3. Indicator framework

A focused set of measures with clear definitions, targets, sources and owners.

Result	Indicator	Definition	Target	Frequency	Source	Owner
Output	Residents supported	Unduplicated participants receiving at least one service	180	Monthly	Activity log	Program lead
Output	Navigation interactions	Completed appointments, drop-ins or outreach interactions	420	Monthly	Activity log	Program staff
Output	Referrals initiated	Formal referrals made with participant agreement	240	Monthly	Referral tracker	Program staff
Outcome	Confirmed referral outcome	% of referrals with a confirmed result within 10 business days	70%	Quarterly	Referral follow-up	Program lead
Outcome	Improved understanding	% of surveyed participants reporting clearer next steps	80%	Quarterly	Short feedback form	Program lead
Outcome	Barrier resolution	% of documented access barriers resolved or advanced	60%	Quarterly	Barrier log	Program lead
Quality	Complete records	% of required fields completed in monthly file review	90%	Monthly	Data-quality check	Manager

Measurement rules & data quality

Definitions, privacy rules and routine checks that keep the year-end results defensible.

- Use an unduplicated participant identifier rather than names in the reporting workbook.
- Count one interaction per completed service encounter; do not count unanswered calls.
- Record the status of each referral using common categories: pending, accessed, declined, ineligible, unable to confirm.
- Use a two-question participant feedback check rather than a long survey.
- Review missing fields and unusual values monthly, not only at year-end.

MONTHLY QUALITY CHECK

Check	Question	Action if incomplete
Required fields	Are all mandatory activity, referral and budget fields complete?	Return records to the owner before monthly close.
Definitions	Are staff using the same counting and status definitions?	Clarify the rule and correct inconsistent entries.
Evidence	Can each reported result be traced to a source?	Add or link the missing record in the evidence register.
Privacy	Does the workbook contain only necessary information?	Remove names and unnecessary personal details.
Reasonableness	Do totals, trends and variances make operational sense?	Investigate outliers and document the explanation.

REPORT READINESS TEST

Before a result is reported, the organization should be able to answer four questions: What is the result? How was it calculated? What evidence supports it? What does it mean for the program?

4. Reporting calendar & evidence plan

The schedule that prevents a year-end scramble.

Item	Due / timing	Owner	Inputs required	Finished product	Status
Monthly data review	5th business day	Program lead	Activity, referral and evidence logs	Clean monthly dataset	Recurring
Budget review	Monthly	Manager + finance	Actuals, commitments, forecast	Variance note and corrective action	Recurring
Quarterly outcome check	15 days after quarter	Program lead	Indicators, feedback, barrier	One-page results	Recurring

Item	Due / timing	Owner	Inputs required	Finished product	Status
			log	summary	
Mid-year funder update	October 15	Executive director	Six-month results and budget	Narrative + financial update	Planned
Year-end data lock	April 10	Program lead	Complete program records	Final dataset	Planned
Year-end report	April 30	Executive director	Results, variance, evidence, attachments	Submitted report package	Planned

EVIDENCE REGISTER

Evidence type	What it supports	Minimum standard	Storage	Report use
Activity records	Volume and reach	Date, type, location, participant ID	Secure program drive	Tables and totals
Referral outcomes	Access and follow-through	Status, date, barrier, outcome	Secure tracker	Outcome indicator
Participant feedback	Understanding and usefulness	Consistent questions and response scale	Survey file	Quotes and percentages
Budget detail	Financial accountability	Approved, actual, committed, forecast	Finance system/export	Budget summary
Supporting materials	Context and credibility	Consent and date where applicable	Evidence folder	Optional attachments

5. Year-end report template

A concise structure that draws directly from the reporting workbook.

PROGRAM OVERVIEW

Program name, funding period, communities served, approved budget and primary objective.

ACTIVITIES AND REACH

What was delivered, how often, where it occurred and who participated. Use totals from the dashboard.

RESULTS AND OUTCOMES

Report each core indicator against its target. Explain what changed and what evidence supports the result.

PARTICIPANT AND COMMUNITY FEEDBACK

Summarize consistent themes, short survey findings and representative feedback. Avoid unsupported claims.

CHALLENGES AND ADAPTATIONS

Identify delivery constraints, access barriers and changes made during implementation.

BUDGET SUMMARY AND VARIANCE

Compare approved budget, actual spending and forecast. Explain material variances and whether they affected results.

NEXT STEPS

State what will continue, change, expand or stop based on the evidence.

REQUIRED ATTACHMENTS

Budget detail, approved supporting materials and any additional documents specified by the agreement.

> **VARIANCE PROMPT**
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> What caused the variance? Was it timing, vacancy, donated resources, lower demand, procurement delay, scope change or another factor? What effect did the variance have on program delivery, and what will happen to the remaining funds?

> **OUTCOME PROMPT**
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> State the result, compare it with the target, name the evidence source and explain what the organization learned. Do not substitute activity volume for an outcome.

6. How the system is used

One connected workflow from funding agreement to final report.

1. Map	2. Build	3. Track	4. Review	5. Report
Extract obligations, dates, outcomes and budget conditions from the agreement.	Create the logic model, indicators, definitions, calendar and evidence requirements.	Record activities, participants, referrals, outcomes, evidence and spending during delivery.	Run monthly data-quality and budget checks; assess outcomes quarterly.	Use the dashboard and report template to complete the funder submission.

FOCUSED STARTER ENGAGEMENT

STARTING AT CAD $1,250

One focused funding agreement or reporting problem; one kickoff meeting; review of available materials; one defined finished product; and one revision round. Examples include a reporting-requirement map, a focused indicator set, a reporting calendar or a practical year-end report template.

FULL SYSTEM ENGAGEMENT

A complete system is scoped according to the number of programs, agreements, reporting requirements, users and tools involved. Typical full-system work may include the funding narrative, logic model, indicator framework, reporting calendar, tracker, dashboard, report template, implementation support and staff orientation.

WHAT THE CLIENT RECEIVES

- Editable Word templates and Excel tracking tools
- Clear definitions and operating instructions
- A maintainable process rather than a one-time report
- A final product built around the organization's actual capacity
- A clean handoff with decisions, owners and next steps

BETWEEN POINTS

Simple by design. The goal is not to create more administration. It is to make the reporting work the organization already has to do clearer, easier and more useful.