

Reporting for Staff, Construction & Equipment Grants

Congratulations, you recently received a grant from the Murdock Trust!

The grant you were awarded falls into one of three categories: **staff and program**, **capital (construction)**, or **equipment and technology**. There are differences in the ways payments are distributed and how you will report on each grant type. In all cases, the grants will be paid out according to the Grant Agreement and the project budget submitted with the application. For most grants, payments are made according to the Murdock Trust's practices and the needs of your organization. The process outlined in this document will help you access your payments, although in some instances, variations are needed, which will be addressed by your program director as the need arises.

STAFF AND PROGRAM GRANTS

Grants for staff positions and new programs usually have an outright portion and a conditional portion on the grant dollars awarded. To request the outright payments, complete a **Progress Report**, and for conditional payments, complete a **Conditions Met Report**.

Let's use a staff grant as an example. Once you've hired the new staff member, you'll submit a **Progress Report** to communicate about the new hire, the progress that's been made on the grant, and to request your first payment. The outright portion, noted in your **Grant Agreement**, is a lump sum that will be divided into three payments, to be paid usually sixth months apart. You may submit the **Progress Report** when the new hire has been made if it happens before the report due date. After the **Progress Report** is approved, then the associated outright portion of the grant dollars will typically be split up into three payments to be paid out in six-month intervals. You'll see this in the **Payments** section of your grants portal, along with the payment due dates. A **Progress Report** for each of these three or so outright payments must be submitted to request the next payment.

The conditional portions of the grant are fixed in advance, so you will already see these in your grants portal in the **Payments** and **Reports** sections. To request these conditional payments, you'll need to submit **Conditions Met Reports** by their due dates. Be sure to show how the condition was met in your report. In most instances, those due dates will be two and three years from the date the grant was approved, but you may submit the report ahead of the due date if the condition has been met. If you are unable to meet a due date, please contact your program director.

Because each organization's needs are different, you may need a payment process that is slightly outside of this format. If so, please contact your program director.



CAPITAL (CONSTRUCTION) GRANTS

Capital grant payouts vary. Often, they have an outright portion and a top-off conditional portion on the grant dollars awarded. Just like with staff grants, to request the outright payments, complete a **Progress Report**, and for the conditional payments, complete a **Conditions Met Report**. Many do not have an outright portion, and payment is conditional on a completed project. In those instances, the **Conditions Met Report** is all that is needed.

If there is an outright portion, you can request this payment when you need it. Just look in the **Reports** section of your grants portal and select the **Progress Report** with the nearest due date. The top-off conditional portion will have a corresponding **Conditions Met Report** with a due date. For a top-off condition to be met, you must complete the project as proposed and obtain the matching portion of funds required to complete funding. Be sure to report on how the condition was met. Once both of these conditions have been met, then you can request a payment by submitting the **Conditions Met Report** by the due date listed on the report. If you are unable to meet the due date, please contact your program director.

EQUIPMENT AND TECHNOLOGY GRANTS

When grants are made for equipment and technology, they are often paid outright as needed. To request all or some of the outright portion, complete a **Progress Report**. If a portion of the grant includes a condition, like a top-off or a match, complete a **Conditions Met Report** sometime before the due date.

In some instances, the Murdock Trust will limit the amount granted as an “up to.” In those cases, a portion of the award can be requested outright. To request this portion of the grant, complete a **Progress Report**. Once the final cost of the equipment or technology is known, then the remainder of the grant can be accessed using the same **Progress Report** process. This method is used to ensure that Trust funds granted do not overfund the project or exceed 50 percent of the total cost of the equipment or technology.

RESOURCES

When you're ready to fill out a report or request a payment, be sure to watch our [Submitting Reports and Requesting Payments through Fluxx](#) video on our website. It walks you through how to navigate the grants portal and correctly submit reports and request payments.

If you have any questions as you go through the reporting process, please visit our website at murdocktrust.org. If you click on the Grant Opportunities page, you'll see an expandable section called Grants Administration & Reporting Resources. Here you'll find helpful instructions and samples for completing your grant reports. And as always, feel free to contact your program director if you have any questions.