



Introduction to Reports

This guide will walk you through how to submit, edit, and track reports in the Golden LEAF Grant Portal. Reports are required for accountability and to track project progress, outcomes, and expenditures.

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Report Types

- You may be required to submit one or more of the following:
- Interim Report: Due every six months while the grant is active. Includes updates on project expenditures, activities, outcomes, and other relevant information.
- Final Report: Due within 60 days of the grant's end date. Includes the same information as an interim report.
- Post Grant Update: Typically, due annually. Focuses on long-term outcomes.

Steps to Submit a Report

1. Go to <https://goldenleaf.fluxx.io>, enter your username and password, then click Sign In.
2. In the left menu, click '**Reports Due**' under **REPORTS**.
3. Select the correct report. Double-check the grant title, due date, and report type.
4. Click **Edit**.

The screenshot displays the Golden Leaf LEAF portal interface. On the left, a sidebar menu lists various sections: INFORMATION, Grantee Portal, Apply for Funding, ORGANIZATIONS (1), Organizations (1), PEOPLE (1), People (1), REQUESTS (7), Pending Requests (4), Requests to Edit, Submitted Requests, Declined Requests (3), GRANTS (3), Active (3), Closed, REPORTS (20), Requirements Due (1), Requirements to Edit, Submitted Requirements (2), **Reports Due (5)**, Reports to Edit, and Submitted Reports (12). The 'Reports Due (5)' item is highlighted with a red box. The main content area shows the details for a 'Test Grantee' report. A red box highlights the 'Edit' button in the top right corner. The report details include: Project Title, Grant ID: G-202503-10262, Due: March 30, 2025, Type: Final Report, Report ID: 14998, and Status: New / Pending Submission. The 'Table Of Contents' section lists: Narrative Information, Priority Outcomes, Other Project Outcomes, Grantee Assessment of Project Outcomes to Date, and Documents. The 'Due Date' is 3/30/2025. The 'Narrative Information' section includes a 'Purpose of Grant' and a 'What lessons have been learned' section. The 'Priority Outcomes' section includes a note about data entry.

Test Grantee
Project Title:
Grant ID: G-202503-10262
Due: March 30, 2025
Type: Final Report
Report ID: 14998
Status: New / Pending Submission

Test Grantee
Project Title:
Grant ID: G-202503-10262
Due: March 30, 2025
Type: Interim Report
Report ID: 14999
Status: New / Pending Submission

Test Grantee
Project Title:
Grant ID: G-202503-10262
Due: March 30, 2025
Type: Post Grant Update
Report ID: 15000
Status: New / Pending Submission

Test Grantee
Project Title:
Grant ID: G-202503-10261
Due: March 31, 2025
Type: Interim Report
Report ID: 14995
Status: New / Pending Submission

Test Grantee
Project Title:
Grant ID: G-202508-09622
Due: July 31, 2026
Type: Final Report
Report ID: 15073
Status: New / Pending Submission

Test Grantee
Project Title:
Grant ID: G-202503-10262
Due: March 30, 2025
Type: Final Report
Report ID: 14998
Status: New / Pending Submission

Table Of Contents

- Narrative Information
- Priority Outcomes
- Other Project Outcomes
- Grantee Assessment of Project Outcomes to Date
- Documents

Due Date: 3/30/2025

Narrative Information

Purpose of Grant:
Briefly describe other activities, accomplishments or impacts, to date, associated with the project that are not included in this report's outcomes and activities sections. Please also discuss areas of underperformance. In your discussion, include factors that contributed to the underperformance and steps taken to address it.

What lessons have been learned or best practices identified during the course of this project to date? What is your organization doing differently as a result of these lessons?

Provide information about any significant Board and/or staff changes in your organization.

Priority Outcomes

Please enter data for baseline actual, date reported from and date reported to below. The other fields are generated based on your data you inputted into the application section. Then click "Save and Continue" to save data inputted.

5. Complete the narrative sections. If no information is available, enter 'None to report' or 'N/A'. This narrative information is an important part of your report and is your opportunity to provide information and context that is not conveyed in the outcomes and activities sections described below.

▼ Narrative Information

Purpose of Grant:
This award provides funding to TEST GRANTEE to support the start-up of the X Program which is a new component of X. X will engage youth who are at risk of dropping out of high school but not eligible for X by placing them in education and workplace readiness initiatives designed to lead to employment in rural X and X Counties. The X program unites K-12 education, community college partners, and local advanced manufacturing leaders to train at-risk high school students to help meet the local employment need.

Briefly describe other activities, accomplishments or impacts, to date, associated with the project that are not included in this report's outcomes and activities sections. Please also discuss areas of underperformance. In your discussion, include factors that contributed to the underperformance and steps taken to address it.

We had 3 seniors to graduate in May. One of these students was hired full-time with X through their Workforce program. After a brief trial period, he hopes to be hired as an X associate. The other 2 seniors have secured employment in their desired fields.

Two students have decided to return to their home high schools and leave the X program for differing reasons. One student's decision was the result of a discipline incident. The other student put much thought into his future and has decided to graduate early from his high school then seek full-time employment.

What lessons have been learned or best practices identified during the course of this project to date? What is your organization doing differently as a result of these lessons?

N/A

Provide information about any significant Board and/or staff changes in your organization.

N/A

6. Enter outcomes achieved during the reporting period. Only the fields highlighted in the red boxes in this guide are completed during the reporting process. All others are established at the beginning of the grant term and pre-populated in the report form. For Cumulative Outcomes, Golden LEAF will track the total number accomplished through the life of the project. For annual outcomes, Golden LEAF will track the number achieved during each specified reporting period, e.g., a school year. See Appendix A for information about which outcomes are cumulative and which are annual.

- a) Cumulative Outcomes: Enter the total to date, using the date your documentation was pulled. Example: 21 housing units have been built for the project - Current Data Reported as of 6/30/2025.
- Add any necessary notes in the 'Additional Notes/Clarifications' field.
 - The outcome reported should match the supporting documentation you provide. Do not adjust the reported data to account for the baseline, prior reported figures, or other factors.

Number of new housing units

Outcome Details

Cumulative Goal:	50
Cumulative Goal date:	3/1/2027
Cumulative Projected Increase:	50
Baseline:	0
Baseline date:	3/1/2025
Data source:	Report Y

Reporting Period

No prior approved report found before the current due date.

Total Housing Units

Current Data Reported as of

Additional Notes or Clarifications (Optional)

- b) Annual Outcomes: Enter the total for your annual term. Use the full reporting period: Reported From = start of the annual term (1 day after your previous 'Reported To' date), Reported To = end date of the current annual term. These dates should not overlap with your previously reported dates. Example: 40 students, Reported From 7/1/2025 – Reported To 6/30/2026.
- Add any necessary notes in the 'Additional Notes/Clarifications' field.
 - The outcome reported should match the supporting documentation you provide. Do not adjust the reported data to account for the baseline, prior reported figures, or other factors.

Increase in students earning at least one academic credential (curriculum diploma, certificate, or associate degree/condensed certificate) in the area funded

Outcome Details

Annual Goal:	55
Goal date:	3/27/2025
Projected Annual Increase:	21
Baseline:	34
Baseline date:	3/8/2025
Data source:	Report Z

Annual Student Total

Date reported from

Date reported to

Additional Notes or Clarifications (Optional)

- c) Average Wage: Enter the average wage at the reporting date. Example: Average Annual Wage \$55,000 – Current Data Reported as of 6/30/2025.
- i) Add any necessary notes in the 'Additional Notes/Clarifications' field.

Average annual wage of new full-time jobs

Outcome Details	
Cumulative Goal:	\$86,000.00
Cumulative Goal date:	3/1/2027
Baseline:	
Baseline date:	10/1/2025
Data source:	Report A
Cumulative Progress	
Cumulative Increase Prior Reporting:	
Reporting Period	
No prior approved report found before the current due date.	
Average Annual Wage	\$55,000
Current Data Reported as of	06/30/2025
Additional Notes or Clarifications (Optional)	

See [Appendix A](#) for a list of priority outcomes and their reporting type.

7. Update Other Project Outcomes and provide an overall assessment of progress.

8. For activities:

- Completed – enter the completion date.
- In the status box, describe progress made and provide other information needed to fully update Golden LEAF on the activity.
- If the activity is dependent on completion of another activity, enter 'N/A' and provide a brief statement of the dependency if needed to clarify the status.

Activity 1 Target Date:

Activity 1 Date Completed	
Activity 1 Status	
Discuss progress made to date, challenges and resolutions, explanations for not meeting target dates, and any other comments.	

9. To upload documents, click '+ Add Files' and choose your files.

▼ Documents

Please attach any/all relevant documents to the below "Report Attachments" section.

Invoice copies	+
Evidence of payments made	+
Financial report workbook	+
Supporting documents for outcomes	+
Supporting documents for activities	+
Supporting documents	+
Signed Certification Form	+
Other (photos, approved minutes, etc.)	+
Report Attachments	+

- Click **Add Files** or drag files into the window.
- Click **Start Upload**, then close the window once completed.

- Confirm the file has been uploaded before continuing.

10. Click **Save and Close** at the bottom right of the page.

11. Click **Submit** at the bottom right of the page, then click OK.
After submission, you cannot edit a report unless staff return it to you.

12. Confirm the status shows the report was successfully submitted.

Golden LEAF Staff Follow-Up

1. If additional information is needed, the **Primary Contact** will receive an email.

Dear Test ,

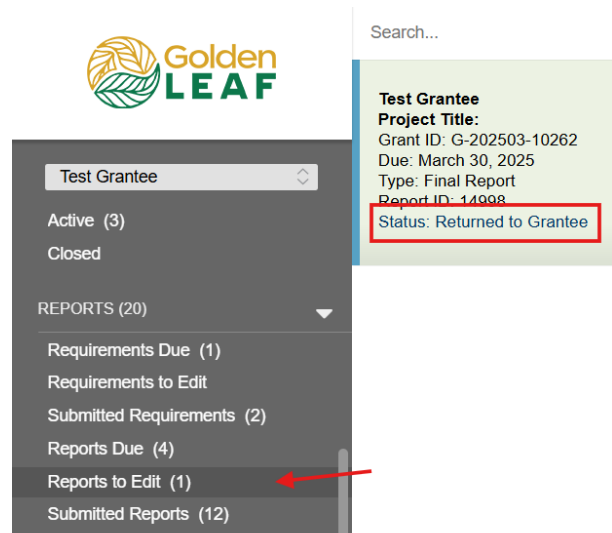
Thank you for having submitted your Final Report. I have completed my initial review. Please log into the [Golden LEAF grant portal](#), navigate in the menu to "Reports to Edit" (or "Requirements to Edit"), then select the relevant item to respond to the following request(s) :

Please provide documentation of XYZ.

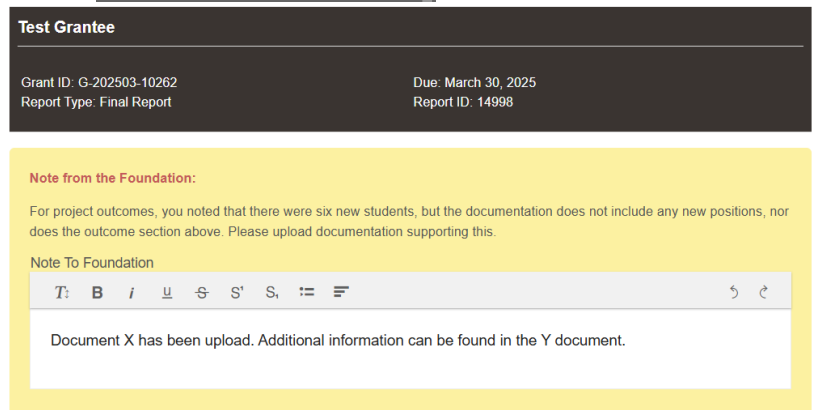
Please let me know if you have questions.

Thanks!

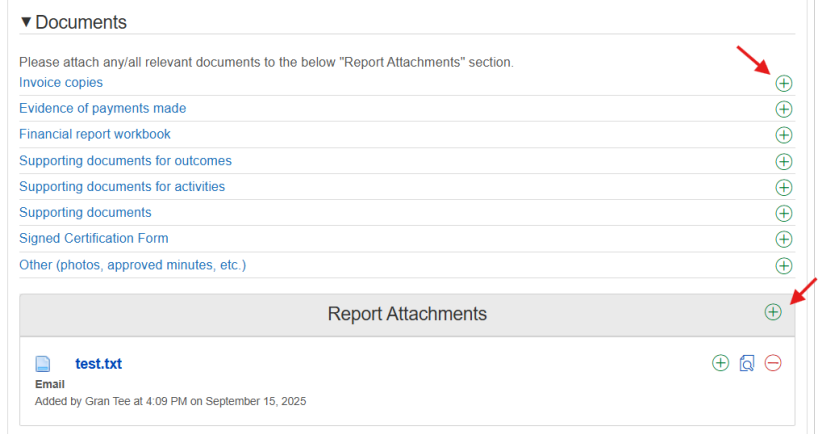
2. In the left menu, click '**Reports to Edit**' and select the returned report (status: Returned to Grantee).



3. Review instructions (displayed as a banner at the top of the report) and click Edit.
4. Respond in the '**Note to Foundation**' field if needed.



5. Upload additional or revised documents.



▼ Documents

Please attach any/all relevant documents to the below "Report Attachments" section.

Invoice copies	+
Evidence of payments made	+
Financial report workbook	+
Supporting documents for outcomes	+
Supporting documents for activities	+
Supporting documents	+
Signed Certification Form	+
Other (photos, approved minutes, etc.)	+

Report Attachments

test.txt

Email

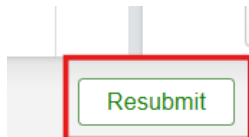
Added by Gran Tee at 4:09 PM on September 15, 2025

6. Click **Save and Close**.



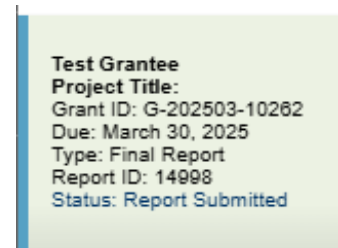
Cancel ABC Save Save and Close

7. Click **Resubmit** in the bottom right of the page, then click OK.



Resubmit

8. Confirm status has changed to **Report Submitted**.



Test Grantee

Project Title:

Grant ID: G-202503-10262

Due: March 30, 2025

Type: Final Report

Report ID: 14998

Status: Report Submitted

Checking Report Status

You can find reports that have not been submitted in the **Reports Due** section of the grant portal menu. If reports have been returned to you for additional information, you can find them in **Reports to Edit**. Reports that have been submitted and are under review may be found in Submitted Reports.

The screenshot displays the Golden LEAF grant portal interface. On the left is a navigation menu with sections for 'REPORTS (20)' and 'PAYMENTS (7)'. Under 'REPORTS', there are links for 'Requirements Due (1)', 'Requirements to Edit', 'Submitted Requirements (2)', 'Reports Due (4)', 'Reports to Edit (1)', and 'Submitted Reports (12)'. The main content area is divided into a search bar and a list of reports. The first report listed is for 'Test Grantee' with Project Title, Grant ID: G-202503-10261, Due: July 31, 2026, Type: Final Report, Report ID: 15974, and Status: Approved. Below this, there are two more reports for 'Test Grantee' with Project Title, Grant ID: R-202608-10854, Due: July 31, 2026, Type: Final Report, Report ID: 15976, and Status: Approved. On the right side, there is a detailed view of a report for 'Test Grantee' with Grant ID: G-202503-10261, Report Type: Final Report, and Status: Approved. Below this, there is a 'Table Of Contents' section with links for 'Narrative Information', 'Priority Outcomes', 'Other Project Outcomes', 'Grantee Assessment of Project Outcomes to Date', and 'Documents'.

Approved reports remain in the **Submitted Reports** section, in view-only status—uploaded documents can no longer be modified or removed by you. Previously uploaded documents can only be previewed.

Best Practices and Tips

- Save your progress frequently using 'Save and Close'.
- Upload documents as PDFs whenever possible.
- Use descriptive filenames (e.g., 'Invoice_Q1_2025.pdf').
- Contact [grant portal help](#) early if you run into issues.

Contact Information

For assistance with submitting reports or other portal-related questions, please contact us at GrantPortalHelp@goldenleaf.org

For questions about the substance of reports, please contact your Program Officer.

Appendix A

Priority Outcomes

Job Creation and Economic Investment			
Priority Outcome	Unit of Measure	Measurement Period	Source of Data
Investment in publicly owned infrastructure	\$	Cumulative	Public Utility records / construction documents
Investment in privately-owned property, plant and equipment	\$	Cumulative	County tax records/ construction documents/award letters
New full-time jobs created	Number of FT jobs	Cumulative	NCUI 101/Employer certifications/payroll records
Average annual wage of new full-time jobs	\$ (average wage of new jobs)	Time of Reporting	Employer certifications/ NCUI 101/payroll records
Number of new housing units	Number of new housing units	Cumulative	Grantee Reported
Workforce Preparedness			
Priority Outcome	Unit of Measure	Measurement Period	Source of Data
Increase in students completing at least one academic credential in the area(s) funded annually (certificate, diploma, degree programs)	Unduplicated student course/program completers	Annual	Colleague/Datatel/Power School

Increase in students earning at least one industry/3rd-party credential/certification annually	Unduplicated students earning an industry credential	Annual	NIMS/AWS/MSSC/ other industry certification reports
Increase in high school students completing CTE pathway in area(s) funded annually	Unduplicated high school student course/program completers	Annual	Colleague/Datatel/Power School
Increase in secondary or post-secondary students participating in work-based learning annually	Unduplicated students in WBL	Annual	WBL host-organization records/Program records
Increase in secondary students receiving meaningful exposure and opportunities to explore local career opportunities annually	Unduplicated participants	Annual	Course/module participation records/industry host records
Investment in publicly owned infrastructure	\$	Cumulative	Public Utility records / construction documents
Agriculture			
Priority Outcome	Unit of Measure	Measurement Period	Source of Data
Number of participants at agricultural trainings (e.g. field days, etc.)	Participants	Annual	Participant sign-in sheets
New publications directed towards farmers	Materially unique farmer-friendly publications	Annual	Publications distributed to or made accessible to farmers

Monthly use of agricultural facilities that benefit farmers	Farmer-users	Annual	Ag facility records
Investment in publicly owned infrastructure	\$	Cumulative	Public Utility records / construction documents