
Grantmakers of Western Pennsylvania

COMMON GRANT REPORT FORMAT

Introduction

Grantmakers of Western Pennsylvania (GWP) created a Common Grant Application in 1996 to simplify the process of requesting foundation and corporation grants. It serves both grant seekers and grantmakers. GWP has designed the Common Grant Reporting Format for a similar reason – to provide guidance to you, the reporting agency, in reporting on the outcomes of your grant project and to assist grantmakers in understanding what has transpired and in learning from your experience. The report is an important aspect and product of the grant.

The word *evaluation* is the most common term employed for such a report. It is certainly appropriate. Grantmakers are looking to you to be reflective, analytical, and evaluative in the best possible way. However, the term *evaluation* has limiting connotations and commonly urges reporters to prove their success without reflecting on, and sharing, some of their most important learnings of the experience – quite possibly the creation of new knowledge. You and the funder are partners in your program endeavors and can help each other identify important results, unintended consequences, and other relevant facts or perceptions that will enable both of you to learn from your experience. We urge this. When your reporting reflects your actual work and results, your relationship with the foundations and corporations is strengthened and your track record is documented for future planning and funding. Your report is documentation not only of your project, but an account that can benefit others in the future.

Explanation of the Report Format

The *Common Grant Reporting Format* consists of three sections. (In addition, some foundations will add a Section IV in order to address questions that are specific to the foundation or your grant.)

- Section I is a cover sheet that asks for general grant information.
 - Section II is a narrative. It consists of a series of questions that have been designed to prompt your reflection and report on your experiences and learnings and to assist both you and the funding source in monitoring and assessing your grant experience and outcomes.
 - Section III is a financial report that provides an accounting of your expenses.
 - The report is to be signed by both the executive director and board president. If you have questions regarding the completion of the form or would like to attach additional materials, contact your grants administrator.
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SECTION I. COVER SHEET OF GENERAL INFORMATION

Date _____

A. Organizational Information

Organization _____

Address _____

Phone _____ Fax _____

E-mail and/or Website (if appropriate) _____

Executive Director _____

Contact person (if other than Executive Director) _____

B. Grant Information

Foundation Program Officer/Grant Administrator _____

Amount of Grant _____ Period of Grant _____

Project Name _____ Grant Reference# _____
(If appropriate)

Purpose of Grant _____

Stated
Goals/Objectives/Outcomes _____

Organizational Changes (e.g., administrative or staff changes since grant was approved)

Signature of Executive Director

Signature of Board President

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SECTION II. OVERALL GRANT REPORT

Please respond reflectively to all of the following questions. Attempt to limit your total narrative to approximately two – three pages.

1. Has the grant expanded or made a difference in the quality of the services that you provide and/or in your organizational effectiveness? If so, in what way(s)? If not, what circumstances or obstacles impeded or limited your work?
2. What impact did the grant have on the population you serve? Your staff? The community?
3. During the course of the project, what transpired that differed from what you anticipated?
4. What did you learn from your pursuit of the objectives that you established?
5. Based upon current conditions, are there things that you would do differently in utilizing the grant award? If so, what?
6. What were the primary lessons that you and your staff learned from this grant project? How might they impact your future thinking, performance, or services?

If appropriate:

7. If the grant project is part of a larger campaign, please provide a status report on the campaign.

 8. If the project involved collaboration with other organizations, please comment on its effect on the project.
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SECTION III. EXPENSE REPORT

A. Overall Report

Although you may design your report to suit your needs, your expenses report should:

1. Account for all project expenses by placing them in line item categories (See “B”)
2. Provide a three-column financial report that represents: a) the projected budget of expenses (This should be taken from your grant proposal.); b) the actual expenses; and c) the difference between the two.
3. Provide a total for each column.

B. Items To Be Included

The following information should be included in your expense report.

1. Heading: Specify the grant period (e.g., January 1, 1998 – December 31, 1998).
2. Expenses: Following is a list of possible line items for your grant expense report. Yours may include some or all of these and others. Add any additional items that are relevant to your particular program or capital project. Your line items should be the same as in the original proposal.

Personnel Costs

- Salaries and wages by individual position, specifying full-or part-time positions
- Payroll taxes
- Fringe benefits and related fees
- Consultant and professional fees (e.g., accounting, legal, etc.)

Operational Costs

- Equipment
- Supplies
- Printing and copying
- Telephone and fax

- Postage and delivery
- Rent
- Utilities
- Travel
- In-kind expenses

Total

1. Explanation: Write a short narrative explanation of one paragraph or less to answer the question: How was this grant spent? (Example: The \$10,000 grant was used to purchase a Gateway 2000 Computer and Hewlett Packard Laser Printer.)

Note: Please note that if there are remaining funds from an individual grant, a foundation may either: 1) request a refund of the unspent funds, or 2) request a proposal to use the unspent funds.

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