

ROCHESTER AREA COMMON REPORT FORM
INFORMATION FOR GRANTMAKERS AND GRANTSEEKERS
Daisy Marquis Jones Foundation

The Common Report Form (CRF) was developed in 1999 by the Rochester Grantmakers Forum and the Rochester Effectiveness Partnership program to facilitate the reporting process for both grantmakers and grantseekers, and to help them focus on results. Grantmakers and grantseekers worked together to create it.

Funders want to know about the actual outcomes of funded projects and what grantees have learned – both positive and negative outcomes - not just quantitative data about how many people were served or how many activities took place. Funders investing in our community and grantees delivering services need to understand whether or not particular program services make a difference in the lives of those who receive them. Examining outcomes helps an organization gain valuable information about how to strengthen its work and improve results for those who receive services. Communicating what is learned, including results, also can provide a platform to engage current funders, attract new funders and volunteers to support a program. We recommend that the Common Report Form be completed and sent to funders 12 months after their financial support is received unless they require a different reporting schedule.

This latest version of the CRF is a companion piece to the Common Application Form. The Common Report Form is most effective when a logic model is used to develop plans for the funded project or capital purchase, and results are tracked through that logic model.

PLEASE NOTE:

If your **Daisy Marquis Jones Foundation** award **was less than \$6,000**, you need only complete Sections A, B, and C plus the Financial Report.

You do not need to complete the page entitled “3. ROCHESTER AREA LOGIC MODEL”

ROCHESTER AREA COMMON REPORT FORM - DMJF

Please answer the following as completely and succinctly as possible.

Submit this report 12 months after receiving a grant unless the funder requires a different reporting schedule.

PLEASE NOTE:

Daisy Marquis Jones Foundation Grantees whose award was \$6,000 or greater must complete this form in its entirety.

Daisy Marquis Jones Foundation Grantees whose award was less than \$6,000 need only complete Sections A, B, C, and the Financial Report.

SECTION A (Complete Section A directly on this sheet.)

Organization completing report:

Address:

Contact Person:

Phone:

Project Name:

Funder receiving report:

Grant Amount:

Report Due Date:

This report covers the time period of _____ (date) to _____ (date).

Type of Support: Capital: construction renovation equipment
 Endowment
 Program/Project
 General support for agency operations
 Other (describe)

Your signature:

Your title:

Date:

SECTION B: FUNDER'S NOTES (leave blank for funders to make notes here)

SECTION C

- 1) Use the attached form to compare your original budget with actual figures. Explain any variations from the original budget that are larger than 10%.

Answer items 2-5 in up to 2 pages:

- 2) Has this grant been instrumental in attracting additional support in the form of people, money, goods, services or publicity? If so, describe.
- 3) Review your logic model (or original plans, if no logic model exists for this effort) and:
 - a. Provide information about each outcome you indicated you would track.
 - b. Describe and explain any significant variances from the original plans outlined in the logic model.
- 4) Lessons Learned: What have you learned, e.g. about effective program strategies, realistic outcomes, usefulness of the logic model (include any feedback you want us to have about the logic model), on-going value of the project.
- 5) If applicable, summarize your current plans for the project's future:
 - a. Programming envisioned
 - b. Financial support envisioned
 - c. Your ability to secure necessary support in the future

1. FINANCIAL REPORT

A. Provide the following information regarding the program or project for which you received funds.

SUPPORT/REVENUE

	BUDGETED	ACTUAL
	Total Anticipated Support/Revenue	Actual Support/Revenue
1. Requested grant		
2. Fundraising events		
3. Gifts/bequests		
4. Miscellaneous contributions		
5. Foundation/corporate grant support		
6. United Way		
7. Govt. agency grants/contracts		
8. Program service fees		
9. Membership dues		
10. Investment income/transactions		
11. Sales: services, products, crafts		
12. Miscellaneous revenue		
13. Subtotal Direct Support/Revenue		
14. General & Management Income (prorated)		
15. Total Support/Revenue		

EXPENSES

	BUDGETED	ACTUAL
	Total Anticipated Expenses	Total Actual Expenses
16. Salaries of provider staff		
17. Fringe benefits		
18. Professional fees (contract, consultant)		
19. Supplies (consumable)		
20. Printing and postage		
21. Occupancy		
22. Phone and fax		
23. Travel and meetings		
24. Training		
25. Evaluation		
26. Equipment purchases		
27. Miscellaneous expenses		
28. Subtotal Direct Expenses		
29. General & Management Expenses (prorated)		
30. Total Expenses		
31. Surplus (Deficit)		

B. Explain any variances between budgeted and actual figures that are larger than 10%.

3. ROCHESTER AREA LOGIC MODEL

(See attached Logic Model Section for guidelines and sample logic models.)

Program/Project _____ Agency _____ Date _____

Program/Project Time frame: _____

Program/Project Goal: _____

Names & titles of those with key roles in developing logic model:

Inputs (\$\$, staff, volunteers, materials & other resources required) Quantify inputs wherever possible (e.g. “2.5 FTE social workers,” “270 volunteer hours”)	Activities (What the program does with the inputs to achieve its outcomes) Activities should be quantified (e.g. 2 support groups/10 moms ea./2 hrs/wk for 4 mos.)	Projected Outcomes (Effects on knowledge, attitudes, skills, behavior, condition or status during or after the program/project)	
		Shorter-term Outcomes Place a “*” next to those to be measured	Longer-term Outcomes Place a “*” next to those to be measured

(Add additional pages if needed.)