

Common Grant Report Format (CGRF)

Tips for Users

INTRODUCTORY COMMENTS

The Common Grant Report Format (CGRF) is a tool for grant seekers and funders that was designed and implemented in Colorado in 2002. It is available at the following web sites:

www.coloradofunders.org

www.crcamerica.org

www.canpo.org

The form is also available on many of the web sites of funders who accept the CGRF. *This particular document is meant to assist grant seekers as they prepare a report using the CGRF.*

HINTS FOR THE FIRST PAGE

The first page is designed to mirror the Common Grant Application (also available at the web sites mentioned above).

- Please make sure to provide all of the requested information.
 - Please make sure to get the appropriate signature.
 - *Remember that further grant requests may not be considered until the report has been completed and returned to the funder.*
 - The name of the organization should be the same as the IRS Form 990.
(For example, a nonprofit might be referred to as the Granby Library, but if the official name is Friends of the Granby Library, that is the name that should be listed.)
 - It is important for a foundation to know whom to contact. Sometimes that is different than the executive director. *(In one instance, a foundation tried to call the executive director – the only name on the proposal. That person was unavailable for two weeks. An additional contact name would have speeded the process.)*
 - It is important that an organization can articulate the purpose of a grant in a sentence or two.
(Sometimes that description is used in a foundation's annual report.)
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NARRATIVE

The CGRF asks for a maximum of four pages because “less can often be more.” Brevity helps grant seekers clarify their thoughts about the most important aspects of a project. It helps a foundation get the maximum amount of information in the least amount of time. Relevant documents may be attached. When filling out the CGRF, please download or retype the number and question to which you are responding for the reader's benefit.

Please keep in mind that accountability is not just about funders holding programs responsible, but also about providers using outcome data to ensure that the needs of their clients are being met.

A. Results/Outcomes

1. Please describe the progress made toward the stated goals and objectives related to this specific grant. (Please include those stated goals and objectives in your response.)

The answer to this question reminds the reader of the original intent of the grant and compares how the project/organization did versus what was originally intended.

An easy method is to “cut and paste” the approved goals and objectives from the original proposal. Be sure to include any changes agreed to at the time you signed a grant contract. For each goal/objective, briefly relate the progress you have made to date.

The following is sample of how you might report your stated goals and the related progress made during the grant period:

- *80% of all babies will achieve developmental milestones;*
During the grant period, 75% of babies achieved developmental milestones (according to the Ages & Stages assessment tool). Those who did not reach their goals received additional services.
- *100% of babies will have current immunizations;*
100% of babies were current with immunizations during the grant period.
- *100% of eligible children will be socially and academically ready for kindergarten;*
According to the center’s testing system (*name the tool used*), 97% of eligible children tested ready for kindergarten.
- *90% of toddlers will perform at the appropriate developmental levels;*
According to the center’s testing system (*name the tool used*) and teacher observations, 92% of toddlers performed at the appropriate development levels.
- *Parent involvement will increase by 15%;*
Parent involvement increased by 10%. New communication tools were put into place, staff requested parent feedback, and activities were re-designed to better meet the parents’ schedules. (For more detail please refer to Lessons Learned.)
- *Tuition assistance will be provided to all families who request it.*
We were not able to provide assistance to all families due to limited funds (please refer to the Future Plans and Financials section for more detail).

2. What difference did this grant make in your community or neighborhood and for the population you are serving? Please discuss evidence of effect (e.g. numbers served, demographic information, client satisfaction survey results, pre- and post-test results, community indicators, outcomes, etc.).
Note: If you have evaluation materials that document outcomes and impacts of your work, feel free to attach in lieu of answering this or other questions.

With this question, funders want to hear how you measure results, who you served, what outcomes you have to report, and how you know that your programs are making a difference.

For example:

You may know that 40 new mothers received six home visits each during their child’s first year of life. This reports on the number served. Do you also have results from pre- and post-tests that

prove the mothers gained new knowledge or skills? This would be an outcome that describes the impact of the program.

If your organization is not measuring impacts or would like to gather more data than you are currently able to do, it would be helpful to explain why you are not collecting data and/or what data you would like to collect and what it would take in order for that to happen.

3. Were there any unanticipated results, either positive or negative, that you have not already described in A2 above? If yes, please describe the implications.

This is a key question that encourages capacity building within an organization. It helps people to understand that variances are NOT bad. Unpredicted outcomes can be positive if the organization learns from them, responds to them, and makes effective programmatic changes as a result of them.

There may be surprises encountered in the course of your work. Are those surprises anomalies or do they have broader implications that cause you to re-think parts of your program?

For example:

Many years ago a prominent nonprofit organization set up a program for Denver's west side to help with family self-sufficiency and improved health. Members of the nonprofit surveyed many residents to ask what was missing with other programs and what services people would be interested in. The residents, mostly Latina women, were enthusiastic about learning job skills, improving their English, providing opportunities for their children, and finding ways to better access medical care. The nonprofit carefully responded to the needs assessment, and set up career classes, language schools, and even arranged for pro-bono dental and medical examination—all during the daytime. Very few people came. Surprised, the nonprofit wondered what had happened. Fortunately, representatives went back out to the community and asked why there was little interest. They found that women couldn't come without finding care for their children. The nonprofit set up an educational child care program for families participating in the self-sufficiency program, and the project became well subscribed. In fact, it became a national model.

4. Describe collaborations, if any, related to the work funded by this grant and how it impacted your efforts.

Collaborations are not necessarily required or expected. They can, however, be an efficient and powerful means to an end. Leveraging resources is the key. Funders are always interested in hearing about collaborations as a way of maximizing impacts. Collaborative relationships are often very simple (e.g., posting flyers of a service provided by another organization that would be of interest to clients of both organizations). Collaboration can also be very complex and require multiple meetings and negotiations. Weighing the benefits of collaborations with the expenses of time and other resources needed to join forces is important.

If reporting on collaboration is relevant, you may want to share the impact on your clients, as well as on your staff and organization as a whole. Often, collaborations that start with one focus end up leading to combined efforts on other projects or with additional partners.

B. Lessons Learned

1. Describe what you learned based on the results/outcomes you reported in Section A above and what, if any, programmatic or organizational changes you will make based on your results/outcomes.

This question is intended to encourage you to reflect on what you have learned with relation to the purpose of this specific grant and to think about whether what you are learning points you toward making minor or major adjustments to your organization programmatically or through change in resource allocation.

Foundations want to learn from the grant-making process just as much as the service providers do. The objective of both grant seekers and grant makers is to make informed decisions about allocating scarce resources to provide the maximum benefit to the community.

There can be as many positive unintended outcomes as negative. For example, a farmers' market opens in the neighborhood and provides a venue for neighbors to connect. It leads to neighbors deciding to address increased graffiti activity. A synergy of neighborhood cohesiveness develops from a farmers' market.

After reflection, The Nature Conservancy changed its organizational structure. This example is taken from a case study in Nonprofit Management and Leadership, Spring 2001, pp. 371-385.

The Nature Conservancy tackled the challenge of moving beyond measuring activity to measuring mission impact. They tried several different methods before arriving at the final solution. "For almost five decades, TNC has focused on conserving biodiversity by protecting the lands and waters that rare species need to survive. Traditionally, to measure our progress against this mission, at the end of every year we added up the numbers of acres we had acquired and calculated the value of all the charitable donations that we had received. These two basic indicators of Conservancy activity became enshrined in our corporate culture as bucks and acres....

Despite our outstanding organizational results, species extinction continued to spiral out of control."

The TNC developed a set of questions: "Are we making progress toward fulfilling our mission and meeting our goals? Are our activities achieving our programmatic objectives and implementing our strategies? And, do we have the resources—the capacity—to achieve our goals?" The TNC developed different measures of success—all had to address progress toward mission: how the organization's actions make a difference." Measures would assess organizational performance in three main areas: impact, activity, and capacity. Impact measures would assess mission success, activity measures would focus on achieving goals and implementing strategies, and capacity measures would gauge the degree to which the organization mobilized the resources necessary to fulfill the mission. The TNC went from a measurement of bucks and acres to developing between two and four specific measurements for each of the three measurement categories. "...In practice, The Conservancy's impact-activity-capacity family of measures has proved very successful.... They have begun to change the behavior of locally based Conservancy staff, with a far greater emphasis on identifying "killer" threats and developing creative strategies for abating them.

Without taking time to reflect on the organizations' activities, The Nature Conservancy would never have adjusted to make itself more effective at meeting its mission.

2. Did external or environmental factors (e.g. a flood, an economic downturn, a partner organization stopped providing services, etc.) affect the achievement of your program or organizational goals or the anticipated timeline? If yes, what did you do to address these issues?

Often factors beyond our control can impact a project or plan. The factors can be very obvious, such as the events of 9/11, forest fires, or slashing of government funding, for example. The more we begin to see how various activities have an influence over our lives and environment, the better we are able to capitalize on opportunities and manage the challenges.

Try to anticipate the different things that might happen. Build risk management into your project or organizational development.

C. Future Plans

1. If you will be continuing this program, what are the plans for sustaining or expanding the program, including a future-funding plan? (For a general operating grant, please answer in terms of the organization.) If discontinuing the program, what factors led to this decision?

This is a tough one to explain, but in general, **funders always want to know that a nonprofit is developing new funding streams.** No funder wants to be solely responsible for a program, because if something happens to the foundation's income source (e.g., a decline in the stock market) or they have a change in priorities, pulling funding may really hurt an organization or program. Every nonprofit should strive for a diverse base of funders.

2. What plans do you have to communicate your outcomes and lessons learned with others?

The general public tends to be uninformed about the impacts that nonprofits have on the health and well being of the community. Most of us need to do a better job of communicating about what we are doing. **If you are having successes, promote them. If you have learned some difficult lessons, it may be helpful if you are able to share those lessons with others.**

It may be as simple as writing a short article, or volunteering to speak at a service club (Rotary, Lions, church, etc). Newspapers, websites, professional journals are often eager for news.

Examples:

Recently, the Denver Parks Department published a list of things it was doing to help with the drought. The Water Board agreed to publish that list in a flyer sent to all customers. That effort was good publicity for the Parks Department and it also made people more understanding about why the grass is brown in many parks.

When the Gates Family Foundation took on a six-year initiative to reform public education, it published a comprehensive report on what worked and what didn't. The report was honest about its strikeouts as well as its home runs. The foundation widely disseminated the report in the hopes that others would learn from the experience.

3. If you have identified areas where increased collaboration between organizations or sectors would lead to increased positive outcomes for your constituents, briefly describe your ideas.

This is also an opportunity to educate funders about some of the roadblocks that may stand in the way of your making more significant progress. Sometimes the solution may be outside the scope of your organization, but it may be something that funders can begin to look into or at least be aware of when foundations meet with other organizations and institutions addressing similar issues. It could be that a funder can suggest ways of overcoming a barrier through the information she or he has gained from similar situations.

D. Other Comments.

1. Please share with us any recommendations you have for our grant making or reporting process.

Funders are interested in being the best funding partner possible. Ideas are welcome!

II. FINANCIALS

1. Please submit your organization's financial statements (Balance Sheet and Income & Expense Statement) for the year(s) in which the grant was used. Please explain any significant changes in your financial position.

Significant changes need to be defined. Most times there is an answer to why there is such a change, but it might not be obvious to the funder. Include a short narrative that explains the situation.

2. If reporting on a *specific project/program*, please also provide income and expenditure information compared to the approved budget for that project or program. If there are any major variances, please explain.

Do not refigure your financials to fit with the granting cycle. It is understood that fiscal years don't align. Simply send your previous fiscal year's financials and a year-to-date report.

The same comment made above about significant changes to the organization's budget applies to specific programs as well. **Please address any major variances.** This part of the report will explain whether a nonprofit has had to change the scope of a program or project.

© **Thank you for taking the time to read this document!** We hope you find the Common Grant Report Format helpful. We also hope that you find it easy to access, easy to use, and that it saves time for you. Best of luck in your work!