



Reporting Guidelines

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for Grants Awarded, Spring 2008

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The SSJCF is very interested in learning how your project is progressing. Additionally, we have a stewardship responsibility to be accountable for monies that are awarded in grants. Our system of reports is designed to accomplish both of these objectives. We have tried to keep the reporting process as simple as possible, and intend that it be a learning experience for both you and the SSJCF. Thus, we encourage you to include your suggestions and comments regarding the evaluation and other aspects of the grants program. We look forward to reading of your progress!

Questions? Call 304-424-6080.

General instructions for all reports:

Take Special Note

As the Contact Person, it is your responsibility to:

- ◆ **retain all reporting materials for the duration of the grant cycle;**
- ◆ submit the appropriate/required report by the stated due date;
- ◆ (in the event you are no longer the Contact Person for this grant) communicate to your successor these responsibilities, provide him/her with all reporting guidelines, and convey the importance of submitting the reports by the stated deadlines.

1. Grants of one year or less duration:

- a. An Interim Progress Report is due six (6) months after the grant is awarded.
- b. A Final Report is due twelve (12) months after the grant is awarded.
- c. If a project is completed within the first six (6) months after funding, a Final Report may be submitted in place of the Interim Progress Report.

2. For multi-year grants (more than 12 months in duration):

- a. An Interim Progress Report is due six (6) months after the grant is awarded.
- b. A twelve-month (12) report is due before funding can be released for each subsequent year; this report includes a financial statement covering the grant activities to this point. The 12-month report is completed for each year of the grant, except the final year.
- c. A Final Report is due at the **end** of the grant period.

3. In the case of one-year grants for which you plan to request an additional grant in an upcoming cycle, a year-to-date report (including a financial report) is to accompany the **new** Letter of Inquiry.

If a grant project is not completed within the stated grant period, the Executive Director of the Charitable Fund may permit an extension. In such cases a 12-month report is completed reflecting the current status and a supplementary report is submitted six weeks after the agreed upon completion date.

Report Formatting Instructions (for all reports)

All reports should be formatted as follows:

- ♦ type-written or computer generated
- ♦ one-sided
- ♦ double-spaced
- ♦ paginated
- ♦ one-inch margins
- ♦ a **minimum** of 12-point font

Attach a cover page with the following:

- ♦ grant reference number (found on your **Grant Contract**)
- ♦ name of organization
- ♦ project name
- ♦ contact person and phone number
- ♦ type of report and date submitted

Report Guidelines:

Deadlines:

If there are circumstances that prohibit you from submitting any of the required reports by the stated deadline, it is important - as a courtesy and for administrative purposes - to contact the SSJCF office (304-424-6080) as soon as possible.

Interim Report Guidelines

Due Date: 3 p.m. - October 4, 2008

1. Restate the goals and objectives of the project, summarizing the progress made to date in achieving each.
2. What are you learning in the process of implementing your project?
3. Have any unexpected problems arisen that might affect the success of your project?
4. Briefly, describe the best or most positive thing that has occurred (to date) regarding your project.

12-Month Report Guidelines

Due Date: 3 p.m. - April 4, 2008

How do you know if you must submit a 12-Month Report? If the grant period for your project is more than 12 months, you must submit a 12-month report before each year's funding can be disbursed. For example, if your request was for three years of funding, in addition to the Interim Report, **you are responsible for:**

- ♦ two, 12-month reports (one on April 4, 2008; the second on April 4, 2009); and,
- ♦ a Final Report (on April 4, 2010).

1. **Achievement of Stated Objectives** (not to exceed two pages)
 - a. Indicate the accomplishments for each stated objective at this point of the project.
 - b. Given those objectives and level of accomplishment this far, rate the present level of goal attainment for the project or program (low, medium, or high) and the rationale for the rating.
 - c. Briefly describe factors that created difficulties toward achieving the objectives.
 - d. The original proposal contained an implementation plan and time line. Provide an updated plan and time line for the next year of the project.
2. **Describe what you have learned in the process of implementing your project.** (One page or less)
3. **What is the best /most positive thing that occurred during the past 12 months of the project?** (One page or less)
4. **Financial Report** (not to exceed two pages)

Complete the financial report for the project (page 4). Show income and expenditures up to this point for the project/program to which the SSJCF grant was directed. If there are categories that do not apply, indicate Not Applicable (NA). If there are other major items pertinent to this project, but not listed on the form, please add them as necessary.

Final Report (Submitted at end of grant period)

- I Achievement of Objectives** (Not to exceed two pages)
- A. The original grant proposed several objectives for the project. Please restate those objectives and indicate what was accomplished for each.
- B. Given those objectives and level of accomplishment, rate the level of **goal attainment** for the **overall** grant project/program (low, medium, high) and the rationale for the rating.
- C. Briefly describe any factors which created difficulties in accomplishing the objectives.
- II Collaborative Element(s)** (Not to exceed one page.)
Describe how collaboration was included in this program/project.
- III Systemic Change(s)** (Not to exceed one page.)
What do you think might be some lasting benefits of this grant program to such groups as participants, staff, community, etc.? Briefly indicate the evidence that leads you to these conclusions.
- IV Project/Program Continuation** (Not to exceed one page.)
Will this project/program continue beyond the period of this grant? If so, briefly describe how — in terms of programs and support.
- V Primary Accomplishment/Outcome** (Not to exceed one page.)
What was the single best part of the project, in your opinion?
- VI Additional Information** (Not to exceed one page.)
In order to have a complete understanding and appreciation of the project/program, briefly cite any additional information you feel would be helpful.
- VII Financial Report** (Not to exceed two pages.)
Submit the financial information outlined on page 4; if there are categories that do not apply, indicate NA. If there are other major items pertinent to this project, but not listed on the form, add them as necessary.

Final Report Due Date: 3 p.m.-- April 4, 2008 (for one-year projects)

Often, we highlight some of our grantees in the Annual Report and in various communication to the SSJCF Board of Directors. If you have any pictures that reflect the activities and/or implementation of your project/program that you would like us to consider for use in any of these publications, please provide the following information:

1. a brief statement of what is occurring/the event,
2. the date, and
3. the names of each person(s) shown.
4. signed Media Release Form (enclosed) — only by those person(s) pictured; make copies of the form as necessary.

Financial Report–Project Budget (Included with 12-Month and Final Reports)

If there are **unusual budget items**, a narrative description explaining should be attached to the report. You may submit the budget in a format convenient for you, as long as it is **typewritten and contains the following information:**

1 HEADING: *Specify the budget period (e.g. January 1, 2007 to December 31, 2007) and grant amount awarded by the SSJCF.*

2 EXPENSES: *Itemize the following expenses. Be sure to include any additional items relevant to your particular project/program. Provide an expense total.*

- Salaries, wages, payroll taxes by individual position, specifying full- or part-time positions
- Fringe benefits and related fees
- Professional fees (e.g. accounting, legal, consulting, etc.)
- Travel
- Equipment
- Supplies
- Printing and Copying
- Telephone and FAX
- Postage and Delivery
- Rent
- Utilities
- In-Kind Expenses

Total Expenses

3 INCOME: *Include all confirmed and anticipated sources of revenue, and indicate their status. Provide an income total.*

- Government Grants and Contracts
- Foundations (Including funding by SSJCF)
- Corporations
- Earned Income
- Individual Contributions
- Fundraising Events and/or Product Sales
- Membership Income
- In-Kind Support
- Additional Revenue

Total Income

Note: If you have a financial report on hand for this project that is **similar** to this format (categories, length, and detail) you may include a copy in place of completing this form.

Due Dates:

Interim Report
October 4, 2008

12-Month Report
(for multi-year requests only)
April 4, 2008

(Subsequent 12-month reports are due on April 4 until the end of the grant period and a Final Report is submitted.)

Final Report
(for one-year grants)
April 4, 2008

Mail your report to:

SSJ Charitable Fund
PO Box 4440
Parkersburg WV
26104-4440

Faxed or emailed reports cannot be accepted.

Additional Information: Although this information is not required in the Final Report, your responses would be very helpful for planning purposes.

- a. Are there results, outcomes, and/or "lessons learned" from this program/project that would be valuable to share with funders and other interested persons and organizations? If so, briefly describe what these are.
- b. Would you be willing to share this information with others (via forums, workshops, printed materials, etc.) should the Charitable Fund decide to contact you?
- c. Do you have comments about this evaluation or any aspect of the SSJCF grants program you would like to share? We encourage you to include those in writing with this report or contact our office (304-424-6080).