

## FINAL REPORTING REQUIREMENTS FOR OCB FLEX GRANTEES

Grantees will submit their reports electronically via their RRF Online Applications and Requirements accounts. Grantees will receive an email notifying them when the report form has been uploaded into their account. In addition, they will receive instructions about how to access the form via an RRF Online Applications and Requirements Account.

The following provides guidance about preparation of the report.

The report is to be submitted by the due date specified on page four in the Grant Award Letter.

The report should be clear, concise, and well organized and should be double-spaced. Do not use gradient shading in charts, tables, or budget reports.

Final reports may be distributed to, or summarized for, a broader audience than the Foundation staff. Therefore, **grantees should not assume audience familiarity with the original proposal or other products**. There is no recommended length for final reports, but they should include the following:

1. Grantees will confirm that the cover sheet (shown in Tab 1 of the online report form) properly displays the following information:
  - Title of project
  - Sponsoring organization
  - Project start date
  - Project end date
2. Grant Analysis Narrative:

The Grant Analysis Narrative has no page limitations; but generally, should be one to two pages in length. The following questions are provided as prompts for your consideration as you reflect on the OCB project. You do not need to address all of the prompts, particularly if they do not have relevance your project. For your convenience, you may choose to respond to the relevant questions directly in a bulleted format within your report.

- What are the principal outcomes that occurred over the course of the project? Describe their impact on the organization's functioning, effectiveness, and/or development.
- Were there any significant problems or project modifications that the project had? If so, describe how they affected progress toward objectives, and what corrective actions have been taken.
- What was the most important lesson(s) learned about the capacity building area you are addressing that will enhance your organization's

future success? What have you been able to do now (or will be able to do soon), that you would not have been able to do before the grant?

- What are some of the specific next steps your organization/project will take to build on the work completed to date? For example, which capacity-related topic area do you plan to address first, second, and/or third? What are some of the initial steps you plan on taking to address them?
- If you worked with a consultant or technical assistance provider during the grant period, please describe how the consulting experience has been, such as successes and challenges presented.
- Do you have any feedback for the Foundation on ways it can enhance or improve the Flexible OCB Fund to help organizations address short-term capacity-building needs?

3. Summary of Findings and Priorities: (Not Required for Targeted Consultation)

This document is only required for Readiness Assessment projects. It is intended to summarize aspects of the assessment process, as well as the recommended priorities discussed with your consultant. It should be signed by the Executive Director, Board Chair, and Project Consultant.

Download our Summary of Findings and Priorities Form [here](#).

4. Financial Report

Include a financial report of expenditures for the entire project. It should include three components: the original approved budget, the amount actually spent, and the variance. Any major alterations in the budget should be explained.

The following sample report template is for illustrative purposes only and can be changed as needed. You can download RRF's sample Financial Report Template for OCB projects [here](#). A grantee may use this format or any other that is appropriate for the project.

<b>Sample Financial Report Template</b>			
	<b>Funds Received from RRF</b>	<b>Actual Expenditure of RRF Funds</b>	<b>Variance</b>
<b>Personnel Expenses</b>			
Payroll	\$ 78,000	\$ 76,960	\$ 1,040
Benefits	\$ 7,020	\$ 7,110	\$ (90)
<b>Total Personnel Expenses</b>	<b>\$ 85,020</b>	<b>\$ 84,070</b>	<b>\$ 950</b>
<b>Direct Expenses</b>			
Postage	\$ 200	\$ 190	\$ 10
Printing	\$ 400	\$ 385	\$ 15
Licensing Fees	\$ 5,500	\$ 5,500	\$ -
Office Supplies	\$ 200	\$ 200	\$ -
Travel	\$ 811	\$ 1,150	\$ (339)
Program supplies	\$ 300	\$ 708	\$ (408)
<b>Total Direct Expenses</b>	<b>\$ 7,411</b>	<b>\$ 8,133</b>	<b>\$ (722)</b>
<b>Indirect Expenses</b>			
	\$ 9,243	\$ 9,243	\$ -
<b>Total Expenses</b>	<b>\$ 101,674</b>	<b>\$ 101,446</b>	<b>\$ 228</b>

If a grantee has questions about completion of the report, the RRF Program Officer assigned to the grant will be glad to answer the questions.

Alternatively, if the Program Officer is not available, contact RRF at 773-714-8080 or [info@rrf.org](mailto:info@rrf.org) and another staff member will help you.