

## Self-Evaluation Requirements

Self-evaluation is a condition of all grants awarded. (See Item 10. *Reports* in the *Grant Terms and Conditions* forwarded to you with your *Letter of Agreement*). Through your feedback we learn more about the various aspects that contribute to project success. This in turn helps both your organization and ours meet our common goal of service to the community.

1. Please check your *Letter Of Agreement, Schedule A* for your reporting schedule.
2. Your *Letter of Agreement, Schedule A* outlines the results that the Community Foundation expects your grant to achieve and contains the approved budget for your grant. Use the attached reporting forms to report on the results, the budget and any grant conditions that may have been attached to your grant.
3. Please follow the format of the reporting forms attached. If you are preparing a report in a specific format for another funder, we will accept a copy of that report.
4. Please contact the Community Foundation office to receive approval to reallocate funds in your approved budget.
5. Mail or email the completed Self Evaluation Form and any attachments to our office within 30 days after project completion.
6. If you have any questions about preparing your report or completing the forms, call our office at (705) 653-2005.

<b>For Office Use Only</b>
<b>Date Received</b>

## Self Evaluation Report

Date: \_\_\_\_\_

Organization Name: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Phone #: \_\_\_\_\_ Email: \_\_\_\_\_

Project Name: \_\_\_\_\_

Grant Amount: \_\_\_\_\_ Reporting Period: \_\_\_\_\_ to \_\_\_\_\_

Person completing this report: \_\_\_\_\_

Position: \_\_\_\_\_ Signature: \_\_\_\_\_

Board President/Chair: \_\_\_\_\_

Signature: \_\_\_\_\_

You are required to submit the following items in your report package. Please check the items you have included.

- Section A – Summary
- Section B – Financials
- Section C – Outcomes
- Any completed resources or materials produced through your grant
- Photographs of the project
- Copies of print, visual and virtual communication (news releases, public announcements, organizational newsletters, printout of website link to CSCF)
- Recognition of the Community Foundation’s support

Complete all three sections of the reporting forms.

All questions may not be relevant to your project. Simply indicate N/A (not applicable) for questions that do not apply or are not relevant to your work.

Report on the entire length of your grant.

## Section A – Summary

**A1. How many people directly benefited from your grant?** \_\_\_\_\_ People

Include information such as the number of people using your services, participating in your programs, attending an event, etc. Avoid counting people more than once.  
Do not include people who indirectly benefited from your grant, such as benefiting from clean air and spaces, # of people to your website, people contacted in outreach who did not respond, or people who did not directly access your facilities, services or programs.

**A2. If your initiative involved marketing, promotion, outreach or raising awareness, how many people did you reach/contact (do not include website hits)?** \_\_\_\_\_ People

**A3. If you held an event as part of your grant, how many people attended?**

Type of Event \_\_\_\_\_ # of people \_\_\_\_\_

**A4. Please indicate the type of media coverage and the number of stories or reports.**

Newspaper article \_\_\_\_\_ Radio \_\_\_\_\_ TV \_\_\_\_\_ Other, please specify \_\_\_\_\_

**A5. Please indicate the activities that your organization undertook to recognize the Community Foundation grant.** Attach copies to report.

- Acknowledged CSCF support in publications and promotional materials
- Recognized CSCF support on website
- Provided link to CSCF website
- Used CSCF logo in print, promotional material and/or website link
- Displayed recognition plaque or other signage in a public location
- Gave verbal acknowledgement of CSCF funding during presentations, etc.
- Other, please specify \_\_\_\_\_

**A6. How many staff and volunteers directly contributed to the initiative funded by your grant?** Staff \_\_\_\_\_ Volunteers \_\_\_\_\_

**A7. How did your organization benefit from your Community Foundation grant?** Check all that apply and provide details where required.

- Enhanced capacity to deliver services or programs
- Increased number of partnerships / networks formed in the community. Name of new partner(s) \_\_\_\_\_
- Increased membership in your organization \_\_\_\_\_
- More active participation of members in your organization
- Improved staff training and development
- Enhanced technological capacity
- Enhanced organizational and/or strategic planning
- Enhanced organizational stability
- Raised profile of your organization
- Increased funds raised. How much? \_\_\_\_\_
- Other, please specify \_\_\_\_\_

**A8. How did the community benefit from your project? How did the project build community capacity?**

- Created economic opportunities in your community
- Enhanced services, programs or events
- Increased participation in community life by removing barriers (i.e. financial, social, cultural)
- Enhanced awareness of issue
- Enhanced or strengthened the local environment (i.e. land, water, air, energy conservation, etc.)
- Increased physical access to buildings, facilities
- Enhanced volunteerism by recruiting, training or diversifying the volunteer base
- Enhanced organizational responsiveness to the community.
- Made better use of community facilities or land by repairing, renovating or making them available to community groups
- Other, please specify \_\_\_\_\_

**A9 . List any project partners, or sponsors and describe the role that they played.**

Project Partner	Role

**A10. Additional Comments**

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**Section B – Financials**

**B1. What is the estimated value of any revenue (i.e. government, business sources, United Way, other Foundations) and/or non-financial support (in-kind, i.e. donated space, services, supplies, time) your organization received as a result of your grant?**

Revenue		In-Kind	
Type	Amount	Type	Amount
Government: _____		Donated Space (office or meeting space, use of phone, fax, etc)	
Business/Corporate: _____ _____		Donated Services (accounting, transportation, website design, etc.)	
United Way		Donated Supplies (equipment, materials, office furniture, etc.)	
Other Foundations: _____		Donated Time (administrative, construction, etc.)	
Individuals			

**B2. Please complete the following financial report:**

Project Expenses		
Description	Actual Expense	Budgeted Amount

Please list all your expenses as itemized in the Budget of the *Schedule A* of your *Letter of Agreement*.

Please attach copies of invoices, etc.

**Section C - Outcomes**

**C1. If you have conditions on your grant, please list them (copy them from the Condition section of the Schedule A of your Letter of Agreement) and explain how you met them. If you have not met any of these conditions, explain why not and how you plan to meet them.**

<b>Condition</b>	<b>Met – Yes or No</b>	<b>How or Why Not?</b>

**C2. Provide a brief summary of the project results, intended and unintended, and how you met your project goals.**

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**C3. What were the indicators of success for the project results? (How did you know you achieved these results/objectives?)**

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**C4. If you were not able to achieve all of your expected results, indicate why by checking all the reasons that apply.**

- Delays in getting started
- Organizational / staffing changes
- Under-estimated time to complete work
- Under-estimated resources needed for the work
- Loss of funding / revenue from other sources
- Lack of community support / partnerships needed for the work
- External factors beyond your control
- Other, please explain \_\_\_\_\_

\_\_\_\_\_

**C5. Do you intend to continue this project?    Yes    No**

**C6. If so, what funding sources are likely to support its future activities?**

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\_\_\_\_\_

### **Additional Questions to Consider**

Other questions you may want to address in your self-evaluation report are outlined below:

1. How has the project affected the lives of the individuals (in their own words)?
2. Include any comments from participants that describe their project experience.
3. Were you satisfied with the application for funding process? Do you have recommendations for improving the grant process?

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