



OPEN SOCIETY FOUNDATION FOR SOUTH AFRICA

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OSF-SA Reporting Guidelines

OSF-SA expects that grantees submit regular progress reports in respect of funds received from the Foundation. The schedule for submission of these reports is contained in the grant agreement. It is requested that grantees note the date for submission of these reports and attempt as far as possible to adhere to them. Failure to submit regular and satisfactory reports will impact on the release of funding. The following are intended as guidelines for reporting.

1. Please provide a brief description of the project for which funding was received (not more than 1 or 2 paragraphs). This description should include:
 - A very brief description of the sector in which you work and the original motivation for undertaking the project.
 - A description of the specific project for which funding was received including the objectives as specified in the grant agreement.
 - The amount of money allocated by OSF-SA for the project.
 - The overall time-frames for the project.
 - The specific time-frames for the work that is being reported on in the progress report.
2. Please describe your progress (both for this reporting period and cumulative) towards each of the specified objectives as outlined in the previous paragraph and the grant agreement. Please do not simply list numbers of workshops etc. undertaken, but rather provide substantive comment on the utility/impact of activities undertaken.
3. Please outline successes, challenges and setbacks encountered during the reporting period that have impacted specifically on the achievement of your set objectives. Provide a brief description of how you dealt with problems encountered or how you intend to remedy these problems.
4. Describe any key lessons you have learned and how you are sharing them and the results of the project, both internally and externally. This should include a brief summary of preliminary or final findings from any internal or external evaluations that have been undertaken.
5. Please provide detailed information regarding any anticipated deviations from the project plan or changes to the time line and budget. Note that you will need to make a separate request in writing to the Foundation for approval of any amendments to the original contract in respect of budgets, time-lines and funded activities.
6. If this is a final report, briefly describe the next phase of the project (continuation, expansion, replication or termination) and if you plan to continue with the work, any resources that you have secured to sustain it.
7. Please provide a detailed financial report documenting spending over the grant period. While OSF-SA does not specify a standard financial reporting format the report should refer specifically to the line items in the budget attached to the original grant agreement. Please note in the financial report any significant deviations on particular line items and the reasons for this. (It may be that the funds will only be expended in the next reporting period). If this is a final report please note that OSF-SA will require your most recent audited statements as soon after the end of the grant period as possible.
8. If there have been any changes to governance structures of the organisation please notify OSF-SA of these changes in the progress report.