GUIDANCE NOTES FOR COMMON REPORT FORM (CRF)

Yorkshire Funders – a network of funders from Yorkshire and beyond – have built on the success of their Common Application Form (CAF) initiative which has been running for the past three years and have launched the Common Report Form (CRF). Both the CAF and the CRF aim to save grant seekers and grant holders time and energy. The more grant makers adopt the CAF and CRF, the more grant seekers and grant holders will find they are being asked the same questions, in the same format and not have to complete dozens of different forms which is exhausting.

1. The CRF is to be used by funding organisations which give out grants to VCSE (Voluntary, Community and Social Enterprise) organisations and should be provided to their grant holders to complete when they are able to outline how and who the grant helped.

2. The CRF and CAF have been designed by a Yorkshire Funders' task force made up of local grant makers, with input from frontline charities and CICs (Community Interest Companies) to ensure that the CRF meets the needs of both funders and grant holders. The task force used **IVAR's six principles for grant reporting** as a starting point.

3. The CRF is intended to be used for smaller grants – around £5,000 or less – however some funders may find the form suits their needs for larger and/or multi-year grants.

4. Yorkshire Funders acknowledges that some funders may need to adapt the CRF template slightly by modifying the wording or removing/adding a question, but we hope large changes won't be made otherwise the form will not be 'common'. Each funder will have to decide if they need to ask the grant holder for their contact details and grant information at the beginning of the CRF, or if they will already have this information on their system. Anything to save grant holders time is a good thing, so make sure you are only asking what you really need to.

5. It is up to each funder to decide if they create a digital or Word document CRF and what format is best for them and their grant holders. It may be added as a form to your online grant management system, sent out as a Microsoft, Google Forms or Jotform link, or a Word document. The task force has purposely included a couple of simple, tick box, multiple-choice question options so that grant holders are not expected to write words for all their answers. People who have English as a second language or a learning disability may find having to write a number of answers particularly challenging and so the CRF takes this into consideration.

6. Ensure that the use and storage of the data on your completed CAFs and CRFs is in line with your Privacy/GDPR policy.

7. If your organisation wants to adopt the CRF, you can download the form **here**, but please inform alex@yorkshirefunders.org.uk so that Yorkshire Funders can log who is using the CRF.

You can also view the Common Application Form (CAF) template here.

If you would like to find out more about the CRF and CAF, email Carla Marshall - carla@yorkshirefunders.org.uk

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