



## OSI Fiscal Sponsorship: Annual Report

### Cover Sheet:

**Due Date of Report:** The due date for the report is **June 1st**.

If you have questions on reporting requirements  
please check with OSI staff at [osi@opensource.org](mailto:osi@opensource.org).

### Type of submission (please check one):

- This report completes the requirements for the current year of participation in the fiscal sponsorship program. **We will be continuing in the program.**
  
- This report completes the requirements for the current year of participation in the fiscal sponsorship program. **We will not be continuing in the program.** We understand that if there are any final funds to receive through the program we will owe an additional report.

Group name: \_\_\_\_\_

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

Telephone: ( \_\_\_ ) \_\_\_\_\_ Fax: ( \_\_\_ ) \_\_\_\_\_

Email: \_\_\_\_\_ Website: \_\_\_\_\_

Contact person and role in group: \_\_\_\_\_

Dates report covers from, \_\_\_ / \_\_\_ / \_\_\_ , to \_\_\_ / \_\_\_ / \_\_\_

**Submit cover sheet, 3-5 page report and financial information to: [osi@opensource.org](mailto:osi@opensource.org)**

Feel free to contact our office at (415) 857-5398 or email us at [osi@opensource.org](mailto:osi@opensource.org) with any questions regarding this report or its submission.



## **Yearly Report Questions and Required Information:**

***Please send us a short report about the fiscal sponsorship project's progress. We hope that this will be an informal 2-3 page narrative report plus a financial accounting.***

### **I. Impact and Assessment**

1. Please restate the goal and objectives as stated in your original proposal and describe progress made.
2. What was most effective? Response should include both qualitative and quantitative impacts where possible.
3. Please identify specific groups and communities that benefited from your program, including, if possible, the total number of people included in these groups or communities.
4. Please identify the benefits provided to the program groups or communities.

### **II. Challenges**

1. Please list any changes of project plans in light of changing issues or significant challenges, whether expected or unexpected, and how dealt with them.

### **III. Evaluation and Lessons Learned**

1. Description of your evaluation process; please indicate who was involved and when it happened.
2. What have you learned? Please describe any lessons or insights from the past year that you intend to apply in the future.
3. How did the funding you received during the year make a difference in your work

### **IV. Funding and Finances**

1. Total funds received by your organization from The OSI during the reporting period.
2. Itemize how these funds were spent.

### **V. Please attach the following items:**

1. Attach a budget for your current fiscal year.
2. Attach a list of pending and planned funding requests for the year.
3. Please attach a list of the organization's Board of Directors/Coordinating Committee/Or Other Decision Making Body. This list must include full names, title if any (i.e. board president, board chair, board treasurer, etc.), home address and telephone number, e-mail address and amount of any compensation paid by the organization to each member of the committee if applicable.
4. A list of all staff and/or core volunteers. (There is no need to replicate the list of Board of Directors/Coordinating Committee/Or Other Decision Making Body in this list).