

Common Reporting Framework

As of December 12, 2018

Introduction

To streamline reporting activities and deliverables for organizations in the area of college and career access, persistence and success, several foundations and nonprofits came together in the spring of 2017 to envision and develop a **common reporting framework**. After many discussions, the group recommended a balance of semi-annual reports and quarterly checklists updates, which are detailed in the following two pages. These initiating foundations and nonprofits are excited about the benefits that this common framework can offer organizations and support its adoption more broadly across other foundations and nonprofits.

Participating foundations and nonprofits include:

Organization	
Nonprofits	Bottom Line Braven Chicago Scholars Harrison Professional Pathways at National Louis University Network for College Success OneGoal One Million Degrees Partnership for College Completion Umoja Student Development Corporation
Foundations	A Better Chicago The Brinson Foundation Circle of Service Foundation Cleveland Avenue Foundation for Education Crown Family Philanthropies Finnegan Family Foundation Julian Grace Foundation Polk Bros. Foundation Prosper Road Foundation Mayer & Morris Kaplan Family Foundation McDougal Family Foundation S5 Foundation Square One Foundation The Osa Foundation The Siragusa Family Foundation

The table below summarizes the schedule for submitting common reporting materials; the common report and quarterly checklist are included in the following pages.

Timing	Common Report Submitted By	Quarterly Checklist Submitted By
February 15	●	●
May 15		●
August 15	●	●
November 15		●

Full Common Report

Introduction: The foundations agree to accept two full reports each year. Reports will be submitted on the following dates:

- Report 1: February 15
- Report 2: August 15

The general outline of each report is provided below. While approximate word counts are identified, there are no minimums nor strict word limits. Organizations are strongly encouraged to provide only the information that needs to be conveyed, as informative, but concise, summaries are preferred over exhaustive analyses. If more context is required, please submit supplemental information in an appendix that is referenced in the question.

Overview:

1. Organization Name
2. Primary Contact Information (including name, phone, email)
3. Reporting Timeframe – i.e., dates for which the report reflects

Operations:

1. Attach the Quarterly Checklist
2. Provide current financial information:
 - a. Annual organizational budget with revenue and expenditures (Report 1: Year-to-December 31; Report 2: Year-to-June 30)
 - b. Audited financial statement (as available, if fiscal year end occurred within 60 days of reporting period date, provide unaudited year-end statement)
3. Provide a description about any significant changes related to governance, management, operations, fundraising, or overall organizational health.

Programming:

1. Attach metrics and outcome data as requested by each foundation. *Submission preferences listed in the submission guidelines chart.*
2. Describe the progress accomplished since the previous report against programmatic goals. (approximate word count 500)
3. If progress was not what was anticipated, please share additional context and explanation. (approximate word count 500)
4. Provide 2-5 highlights from the past reporting period. Share individual stories, successes, and/or other accomplishments that may or may not be directly tied to established goals. (approximate word count 500)
5. Describe any significant changes to the program or workplan. *If there are no significant changes, please write, "No changes"* (approximate word count 500)

Key Learnings:

1. Describe key learnings or new insights that may have been garnered during the reporting period. Please include any new practices or processes that you think should be shared with other non-profits in the area of college and career access, persistence and success. If these learnings have any long-term implications for your program, please elaborate. (approximate word count 500)
2. Describe any unexpected challenges or obstacles you faced, and what you will do differently as a result. (approximate word count 500)
3. Is there anything else that you would like to share? Feel free to include any additional explanations or comments to help us better understand your data. (approximate word count 500)

Common Quarterly Checklist

Introduction: The foundations agree to accept quarterly checklists (no longer than three pages) to identify any significant changes that have occurred during the reporting period. Checklists will be submitted on the following dates:

- Checklist Update 1: February 15
- Checklist Update 2: May 15
- Checklist Update 3: August 15
- Checklist Update 4: November 15

Note: For the quarters in which full reports are submitted, the quarterly checklist will be included as an attachment. When completing the checklists during these quarters, organizations may write, "See report" for any boxes where report narrative may provide an adequate explanation.

Quarterly Checklist Form

Organization Name	
Primary Contact Information (name, phone, email)	
Reporting Timeframe	

Instructions: For each question below, include only the appropriate answer (Yes/No). If your answer is **Yes**, please provide further explanation in the space provided. If **No**, please leave blank. (If there are no significant changes, it is acceptable to leave all comment boxes blank.)

Question	Select One (Yes or No)	Comments
Organizational		
1. Have there been any significant changes in governance, management, operations, fundraising, or overall organizational health in the past quarter?	Yes No	
2. Has your budget (revenue and/or expenses) changed significantly (+/- 10%) in the past quarter?	Yes No	
3. Are you off-track with your revenue goals, including private, fee for service, or government?	Yes No	
Programming		
4. Have there been any significant changes to the proposed program or workplan?	Yes No	
5. Are key program outcomes off-track?	Yes No	
6. Have there been any meaningful changes (including additions) in your key partnerships that may affect your program?	Yes No	
Other		
7. Is there anything else that you would like to share?	Yes No	

Submission Guidelines

Below is a list of the foundations accepting the Common Reporting Framework. Please use the instructions listed in the table below to submit these updates.

Organization	Submission Instructions	Specific Format/Notes
A Better Chicago	Email Doug Scott: dscott@abetterchicago.org And Kelly Jones: kjones@abetterchicago.org	<u>Updates:</u> Word Document <u>Budgets/Financials:</u> Excel or PDF <u>Outcomes:</u> A Better Chicago Excel milestone tracker <u>Other Report Requirements:</u> A Better Chicago will continue to meet quarterly with grantees
The Brinson Foundation	Email Jim Parsons: jim.parsons@brinsonfoundation.org	<u>Updates:</u> Word Document <u>Budgets/Financials:</u> Excel or PDF <u>Outcomes:</u> Common Reporting Tool or, if applicable, the Foundation's customized data sheet <u>Other Report Requirements:</u> Annual due diligence meeting
Circle of Service Foundation	Email Mara Botman: mara@cosfoundation.org	<u>Updates:</u> Word Document <u>Budgets/Financials:</u> Excel or PDF <u>Outcomes:</u> Common Reporting Tool or Organization's preferred format <u>Other Report Requirements:</u> The Common Reporting Framework replaces the Program Update (questions 5-6) on the COSF Challenge Report
Cleveland Avenue Foundation for Education	Email Dawn Reese: dreese@thecafe.org	<u>Updates:</u> Word Document <u>Budgets/Financials:</u> Excel and PDF <u>Outcomes:</u> Common Reporting Tool or Organization's preferred format <u>Other Report Requirements:</u> Annual due diligence meeting
Crown Family Philanthropies	Submit all reports through the CFP Grants Portal: https://portal.cfpgrants.org/	<u>Updates:</u> Upload Word Document or PDF in the Grants Portal <u>Budgets/Financials:</u> Use CFP Template for budget in the Grants Portal <u>Outcomes:</u> Use CFP Template for outcomes in the Grants Portal (Grant Report Outcomes Table)
Finnegan Family Foundation	Email Woody McCally: wmccally@finneganfamilyfdn.org and Katherine Finnegan: kfinnegan@finneganfamilyfdn.org	<u>Updates:</u> Word Document, Excel, or PDF <u>Budgets/Financials:</u> Word Document, Excel, or PDF <u>Outcomes:</u> Word Document, Excel, or PDF
Julian Grace Foundation	Submit all reports through the Julian Grace Grants Portal: https://www.grantinterface.com/Home/Logon?urlkey=juliangrace	<u>Updates:</u> Word Document, Excel, or PDF <u>Budgets/Financials:</u> Word Document, Excel, or PDF <u>Outcomes:</u> Word Document, Excel, or PDF
Polk Bros. Foundation	Email Suzanne Kerbow: skerbow@polkbrosfdn.org	<u>Updates:</u> Word Document or PDF <u>Budget/Financials:</u> Word or Excel <u>Outcomes:</u> Word Document or PDF <u>Other Report Requirements:</u> Multi-year grants to complete additional report before re-applying. See website.
Prosper Road Foundation	Email: Joan Evans Joan@prosperroadfoundation.org	<u>Updates:</u> Word Document or PDF <u>Budget/Financials:</u> Word Document or Excel <u>Outcomes:</u> Word Document or PDF

Organization	Submission Instructions	Specific Format/Notes
Mayer & Morris Kaplan Family Foundation	Email Shira Bernstein: sbernstein@kapfam.com	<u>Updates</u> : Word Document or PDF <u>Budgets/Financials</u> : Word Document, Excel or PDF <u>Outcomes</u> : Common Reporting Tool or Organization's preferred format
McDougal Family Foundation	Submit all reports through the Grants Portal: https://www.grantinterface.com/Home/Logon?urlkey=mcdougal	<u>Updates</u> : Word Document or PDF <u>Budgets/Financials</u> : Word Document, Excel or PDF <u>Outcomes</u> : Common Reporting Tool or Organization's preferred format
S5 Foundation	Email Michael Schield: Schield@gmail.com	<u>Updates</u> : Word Document, Excel, or PDF <u>Budgets/Financials</u> : Word Document, Excel, or PDF <u>Outcomes</u> : Common Reporting Tool or Organization's preferred format in Word Document, Excel, or PDF
Square One Foundation	Email Priscilla Kersten: kerstenpriscilla@gmail.com	<u>Updates</u> : Word Document or PDF <u>Budgets/Financials</u> : Word Document, Excel or PDF <u>Outcomes</u> : Common Reporting Tool or Organization's preferred format
The Osa Foundation	Email Amy Sauer: amy@theosafoundation.org	<u>Updates</u> : Word Document or PDF <u>Budgets/Financials</u> : Word Document, Excel or PDF <u>Outcomes</u> : Common Reporting Tool or Organization's preferred format
The Siragusa Family Foundation	Email John Hicks: jhicks@siragusa.org And Crystal Robinson: crobinson@siragusa.org	<u>Updates</u> : Word Document or PDF <u>Budgets/Financials</u> : Word Document, Excel or PDF <u>Outcomes</u> : Common Reporting Tool or Organization's preferred format <u>Other Report Requirements</u> : Common Reporting Framework replaces the annual grant report requirement