

Common Reporting Framework

Overview

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. Based on updated recommendations in the summer of 2021, the quarterly checklists have been eliminated. At the same time some additional foundations and some nonprofits adjacent to the college/career success space were also added. Participating foundations and nonprofits are excited about the benefits that this common framework can offer organizations, and support its adoption more broadly across the field.

Participating nonprofits and foundations include:

Nonprofits	1.	Advance Illinois	9.	OneGoal
	2.	Bottom Line	10.	One Million Degrees
	3.	Braven	11.	Partnership for College Completion
	4.	Chicago Scholars	12.	Posse Foundation
	5.	Genesys Works	13.	Surge Institute
	6.	High Jump	14.	Teach For America
	7.	iMentor	15.	Umoja Student Development Corp.
	8.	Network for College Success	16.	Year Up
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Foundations	1.	A Better Chicago	11.	Lefkofsky Family Foundation
	2.	The Brinson Foundation	12.	Lewis-Sebring Family Foundation
	3.	Circle of Service Foundation	13.	McDougal Family Foundation
	4.	Cleveland Avenue Foundation for Education	14.	Origami Works
	5.	Crown Family Philanthropies	15.	The Osa Foundation
	6.	Finnegan Family Foundation	16.	Prosper Road Foundation
	7.	Gorter Family Foundation	17.	REAM Foundation
	8.	IMC Charitable Foundation	18.	S5 Foundation
	9.	Julian Grace Foundation	19.	Siragusa Family Foundation
	10.	Mayer & Morris Kaplan Family Foundation	20.	Square One Foundation
			21.	Vivo Foundation

Common Report Instructions

Introduction: The foundations agree to accept two reports each year in lieu of other reporting requirements (subject to individual instructions in the Submission Guidelines below). Reports will be submitted on the following dates (or subsequent workday if the date falls on a weekend or holiday):

- 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 reflected in the report

Operations:

1. 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)
 - c. Also provide a narrative description of any significant changes ($\pm 10\%$) in organization's budget since the last report. (approximate word count 500)
2. 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 nonprofits in the field. If these learnings have any long-term implications for your program, please elaborate. (approximate word count 500)
2. Describe any unexpected challenges or obstacles your organization faced, and what will be done 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)

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 your reports.

#	Organization	Submission Instructions	Specific Format/Notes
1.	A Better Chicago	Email Domonique Battle: dbattle@abetterchicago.org and Colin Baker: cbaker@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
2.	The Brinson Foundation	Email Christy Uchida: christy.uchida@brinsonfoundation.org	<u>Updates:</u> Word Document <u>Budgets/Financials:</u> Excel or PDF <u>Outcomes:</u> Organization's preferred format, or if applicable, the mutually agreed upon data sheet <u>Other Report Requirements:</u> See emailed Documents Checklist and annual due diligence meeting
3.	Circle of Service Foundation	Email Liz Hartnett: liz@cosfoundation.org	<u>Updates:</u> Word Document <u>Budgets/Financials:</u> Excel or PDF <u>Outcomes:</u> 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
4.	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> Organization's preferred format <u>Other Report Requirements:</u> Annual due diligence meeting
5.	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)
6.	Finnegan Family Foundation	Email 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
7.	Gorter Family Foundation	Email Cheri Richardson: cheri@gorterfamilyfoundation.org	<u>Updates:</u> Word Document or PDF <u>Budgets/Financials:</u> Word Document, Excel or PDF <u>Outcomes:</u> Organization's preferred format <u>Other Report Requirements:</u> Common Reporting Framework replaces the annual grant report requirement
8.	IMC Charitable Foundation	Email Lisa Wiersma: lisa.wiersma@imc.com	<u>Updates:</u> Word Document or PDF <u>Budgets/Financials:</u> Word Document, Excel or PDF <u>Outcomes:</u> Organization's preferred format
9.	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

#	Organization	Submission Instructions	Specific Format/Notes
10.	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> Organization's preferred format
11.	Lefkofsky Family Foundation	Email Rachel Graham: rgraham@lff.com	<u>Updates:</u> Word Document or PDF <u>Budgets/Financials:</u> Word Document, Excel or PDF <u>Outcomes:</u> Organization's preferred format
12.	Lewis-Sebring Family Foundation	Email Casey Varela: clewisvarela@lewissebringff.org	<u>Updates:</u> Word Document or PDF <u>Budgets/Financials:</u> Word Document, Excel or PDF <u>Outcomes:</u> Organization's preferred format
13.	McDougal Family Foundation	Submit 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> Organization's preferred format
14.	Origami Works	Email Dani Petrie: dani@origamiworks.org	<u>Updates:</u> Word Document or PDF <u>Budgets/Financials:</u> Word Document, Excel or PDF <u>Outcomes:</u> Organization's preferred format
15.	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> Organization's preferred format
16.	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
17.	REAM Foundation	See grant letter.	<u>Updates:</u> Word Document, Excel, or PDF <u>Budgets/Financials:</u> Word Document, Excel, or PDF <u>Outcomes:</u> Please address outcome measures from your proposal or grant amendment; attach using report portal.
18.	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> Organization's preferred format in Word Document, Excel, or PDF
19.	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> Organization's preferred format <u>Other Report Requirements:</u> Common Reporting Framework replaces the annual grant requirement
20.	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> Organization's preferred format
21.	Vivo Foundation	Email Judi Israel: judiir@gmail.com	<u>Updates:</u> Word Document or PDF <u>Budgets/Financials:</u> Word Document, Excel or PDF <u>Outcomes:</u> Organization's preferred format plus additional programmatic feedback