Common Reporting Framework

Overview

The goal of the Common Reporting Framework is to streamline reporting activities and deliverables. It is designed for organizations that share enough funders to make joint reporting efficient and preferable to reporting to each funder individually. This framework was initially designed in the spring of 2017 by a group of nonprofits and foundations in the area of college and career access, persistence, and success (CCAPS). However, the report is not specific to college or career success, and it has since been judiciously expanded to incorporate other education nonprofits and funders. Participating nonprofits and foundations 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:

Nonprofits
1. Advance Illinois
2. All Chicago (Student Emergency Fund)
3. Bottom Line
4. Braven
5. Cara Collective
6. The Chicago Public Education Fund
7. Chicago Scholars
8. Communities In Schools of Chicago
9. Embarc
10. Genesys Works
11. Gray Matter Experience
12. High Jump
13. Highwood Public Library
14. iMentor
15. Kids First Chicago
16. Mano a Mano Family Resource Center
17. Mikva Challenge
18. National Louis University (Accelerate U)
19. Network for College Success
20. NewRoot Learning Institute
21. North Chicago Community Partners
22. OneGoal
23. One Million Degrees
24. PADS Lake County
25. Partnership for College Completion
26. Posse Foundation
27. Surge Institute
28. Teachers Supporting Teachers
29. Teach For America
30. VOCEL
31. Waukegan to College
32. Year Up
33. Youth Guidance

Foundations
1. A Better Chicago
2. Anonymous
3. The Brinson Foundation
4. Christopher Family Foundation
5. Circle of Service Foundation
6. Cleveland Avenue Foundation for Education
7. Crown Family Philanthropies
8. Finnegan Family Foundation
9. Gorter Family Foundation
10. Hunter Family Foundation
11. IMC Charitable Foundation
12. John & Kathleen Schreiber Foundation
13. The Mayer & Morris Kaplan Family Foundation
14. Lefkofsky Family Foundation
15. Lewis-Sebring Family Foundation
16. McDougal Family Foundation
17. Origami Works
18. The Osa Foundation
19. Prosper Road Foundation
20. S5 Foundation
21. Siragusa Family Foundation
22. Square One Foundation
23. Vivo Foundation

Given the voluntary nature of this initiative, please note that some participating foundations may not accept the Common Report from all participating grantees. Foundations must agree to accept the Common Report from any given nonprofit.

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Common Report Instructions

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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. <u>While approximate word counts are identified, there are no minimums nor strict word limits</u>. Please provide informative but concise summaries. If more context is required, please submit supplemental information in an appendix.

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 (± 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 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
A Better Chicago	Email Nataly Barrera: nbarrera@abetterchicago.org	Updates: Word Document Budgets/Financials: Excel or PDF Outcomes: A Better Chicago Excel milestone tracker Other Report Requirements: A Better Chicago will continue to meet quarterly with grantees
The Brinson Foundation	Email Michael Barber: michael.barber@brinsonfoundation.org	Updates: Word Document Budgets/Financials: Excel or PDF Outcomes: Organization's preferred format, or if applicable, the mutually agreed upon data sheet Other Report Requirements: See emailed Documents Checklist and annual due diligence meeting
Christopher Family Foundation	Email Monica Thorns: monica@christopherff.org	Updates: Word Document or PDF Budgets/Financials: Word Document, Excel or PDF Outcomes: Organization's preferred format
Circle of Service Foundation	Email Liz Hartnett: liz@cosfoundation.org	Updates: Word Document Budgets/Financials: Excel or PDF Outcomes: Organization's preferred format Other Report Requirements: The Common Reporting Framework replaces the Program Update (questions 5-6) on the COSF Challenge Report
Cleveland Avenue Foundation for Education	Email Taylor Coutu: tcoutu@thecafegroup.org	Updates: Word Document Budgets/Financials: Excel and PDF Outcomes: Organization's preferred format Other Report Requirements: Annual due diligence meeting
Crown Family Philanthropies	Submit all reports through the CFP Grants Portal: https://portal.cfpgrants.org/	Updates: Upload Word Document or PDF in the Grants Portal Budgets/Financials: Use CFP Template for budget in the Grants Portal Outcomes: Use CFP Template for outcomes in the Grants Portal (Grant Report Outcomes Table)
Finnegan Family Foundation	Email Katherine Finnegan: kfinnegan@finneganfamilyfdn.org	Updates: Word Document, Excel, or PDF Budgets/Financials: Word Document, Excel, or PDF Outcomes: Word Document, Excel, or PDF
Gorter Family Foundation	Email Cheri Richardson: cheri@gorterfamilyfoundation.org	Updates: Word Document or PDF Budgets/Financials: Word Document, Excel or PDF Outcomes: Organization's preferred format Other Report Requirements: Common Reporting Framework replaces the annual grant report requirement
Hunter Family Foundation	Email Asia Canady: asia@hunterfamilyfoundation.org and Satori Bailey: satori@hunterfamilyfoundation.org	Updates: Word Document or PDF Budgets/Financials: Excel or PDF Outcomes: Organization's preferred format

Organization	Submission Instructions	Specific Format/Notes
IMC Charitable Foundation	Email Lisa Wiersma: lisa.wiersma@imc.com	Updates: Word Document or PDF Budgets/Financials: Word Document, Excel or PDF Outcomes: Organization's preferred format
John & Kathleen Schreiber Foundation	Email Molly Cullum: molly.cullum@jksf.org	Updates: Word Document or PDF Budgets/Financials: Excel or PDF Outcomes: Organization's preferred format
Mayer & Morris Kaplan Family Foundation	Email Shira Bernstein: sbernstein@kapfam.com	Updates: Word Document or PDF Budgets/Financials: Word Document, Excel or PDF Outcomes: Organization's preferred format
Lefkofsky Family Foundation	Email Rachel Graham: rgraham@lff.com	Updates: Word Document or PDF Budgets/Financials: Word Document, Excel or PDF Outcomes: Organization's preferred format plus additional programmatic specific metrics
Lewis-Sebring Family Foundation	Email Casey Varela: clewisvarela@lewissebringff.org	Updates: Word Document or PDF Budgets/Financials: Word Document, Excel or PDF Outcomes: Organization's preferred format
McDougal Family Foundation	Submit through the Grants Portal: https://www.grantinterface.com/Home/Logon?urlkey=mcdougal	Updates: Word Document or PDF Budgets/Financials: Word Document, Excel or PDF Outcomes: Organization's preferred format
Origami Works	Email Dani Houchin: dani@origamiworks.org	Updates: Word Document or PDF Budgets/Financials: Word Document, Excel or PDF Outcomes: Organization's preferred format
The Osa Foundation	Email Amy Sauer: amy@theosafoundation.org	Updates: Word Document or PDF Budgets/Financials: Word Document, Excel or PDF Outcomes: Organization's preferred format
Prosper Road Foundation	Email Joan Evans: Joan@prosperroadfoundation.org	Updates: Word Document or PDF Budget/Financials: Word Document or Excel Outcomes: Word Document or PDF
S5 Foundation	Email Michael Schield: Schield@gmail.com	Updates: Word Document, Excel, or PDF Budgets/Financials: Word Document, Excel, or PDF Outcomes: Organization's preferred format in Word Document, Excel, or PDF
Siragusa Family Foundation	Email John Hicks: jhicks@siragusa.org and Crystal Robinson: crobinson@siragusa.org	Updates: Word Document or PDF Budgets/Financials: Word Document, Excel or PDF Outcomes: Organization's preferred format Other Report Requirements: Common reports are optional for organizations receiving grants that are $10,000 or less. In lieu of a report, a site visit or meeting with foundation staff once per year is encouraged.
Square One Foundation	Email Priscilla Kersten: kerstenpriscilla@gmail.com	Updates: Word Document or PDF Budgets/Financials: Word Document, Excel or PDF Outcomes: Organization's preferred format
Vivo Foundation	Email info@vivofdn.org	Updates: Word Document or PDF Budgets/Financials: Word Document, Excel or PDF Outcomes: Organization's preferred format