



## Heckscher Foundation Interim Report Instructions and Sample

All Heckscher Foundation reports must be submitted online through the Grantee Portal. For a direct link to the portal, please contact your Heckscher point person.

Each reporting requirement has two components:

- **Narrative Report:** This report provides an update on each activity or strategy, shorter-term outcome, and longer-term outcome and is based on the logic model you submitted.
  - We recognize that some short-term goals may not be completed, and some long-term goals can exceed the 12-month grant period, but we expect grantees to report on progress to each outcome even if final data is not yet available, as these outcomes were listed on your initial application logic model.
  - The response for each is limited to 75 words.
- **Financial Report:** This report provides an up-to-date, clear accounting of actual expenses for which Heckscher grant dollars were used and is based on the project budget you submitted with your grant application.

### Report Sample

*Please note: the sample below follows the structure of the online report template.*

#### Details

**Organization Name**

All Stars Project Inc

**Grant Amount**

\$10,000.00

**Project Title**

College Access NYC Pilot Program

**Grant Date**

4/5/2018

#### Logic Model: Activities or Strategies

*As a grantee of the Foundation, you are required to report on the progress of your grant using the original logic model included in your proposal. You will find a copy of the logic model responses ready to update in the boxes below. This interim report is your opportunity to tell the Foundation about the progress of your originally stated activities, outcomes and goals and to share with us any special challenges and/or triumphs you may have experienced thus far. Please update us on each outcome listed in the Logic Model. A sample format for this report appears on our website should you need additional guidance.*

**Activities or Strategies 1 from Application:**

We will provide 35 hours of SAT prep instruction over 6 months to 85 students.

**Activities or Strategies 1 Interim Report Update:**

To date, we have provided 20 of 35 hours to 85 students. The remaining 15 hours are scheduled to be completed within the following month.

### **Logic Model: Shorter-Term Outcomes**

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#### **Shorter-term Outcomes 1 from Application:**

All students will show at least a 100-point improvement on the SAT over 3 practice tests.

#### **Shorter-term Outcomes 1 Interim Report Update:**

We are on track to meet this outcome for all 85 students. 2 of the 3 practice tests have been completed showing an improvement in scores from the pre-test to the 2<sup>nd</sup> practice test and we fully expect all students to achieve the minimum improvement of 100 points by the 3<sup>rd</sup> and final practice test.

### **Logic Model: Longer-Term Outcomes**

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#### **Longer-term Outcomes 1 from Application:**

More than 70% of students will be admitted to college.

#### **Longer-term Outcomes 1 Interim Report Update:**

We are on track to meet this outcome with 80% of the senior students completing applications to at least 2 four-year colleges and at least 2 two-year colleges. All students who have completed applications have also finalized financial aid forms. We will have acceptance data by the final report.

### **Additional Questions**

#### **If you wish to provide any additional comments, you may enter them in the space below.**

We are working on creating an extended curriculum for this program based on the success of this pilot project.

#### **If there were special terms relating to your grant, describe the current status of meeting those terms (e.g. challenge grant matching).**

We have secured some matching funds for the \$100,000 challenge and expect to meet the full challenge before the end of the grant period. Matching funds were secured from XYZ Foundation (\$55,000), but we are in conversations with ABC Corporation, 123 Family Foundation and applied for 987 Local Government funding for potential support. We also anticipate that new funds may be pledged as matching donations through our gala fundraiser in May.

#### **How have the funds from this grant been used to date? If the entire grant has not been expended, please explain for the unexpended.**

Approximately 75% of the grant funds have been utilized for our program purposes stated in our logic model (build-out of our in-school college access program, teacher training, transportation for campus visits and a mentor training event); funds will be expended before the end of the grant period. See attached updated project budget with expenditures.

#### **If the grant was for an ongoing program activity, what funding has been secured for continuation?**

With initial success of the pilot program this year, 17 schools have already signed onto continue the college access program in their schools. Next year, 80% of the program will be paid for through a fee-for-service model and the remaining 20% will be committed by our board members if other private funds are not secured for this specific program, but we already have interest from one large foundation for a future expansion effort and are in early conversations with others.

**Did this grant assist your organization in obtaining funds from other sources?**

We have secured over half of the funding toward the challenge grant and have been successful in gaining interest from several new potential private funders. Piloting the program is enabling us to refine our college access model within both district and charter schools. Other funders have demonstrated interest in expansion of the program to additional school networks; we expect to be able to share new funders for next year in the final report to The Heckscher Foundation.

**Attachments**

*Choose the corresponding file for each attachment type below and click "Upload."*

**Please attach an interim financial report.**

**Please attach an updated list of funding and amounts from other sources for your current fiscal year (include the fiscal year).**

**Please attach any supporting documentation (optional).**