

The 3rd Step in the 3-R's of Fundraising: Request ↑ Receive ↑ Report

Managing ASPSF Reporting Requirements

ASPSF provides funding to support local SPSF's in the form of Matching Grants and Pass-through Grants from foundations, corporations, and state government. Like any supporter, we want feedback on how our funds are being used and what impact is being made. In turn, we must report back to our funders and let them know how their funds are being used statewide. Therefore, we ask for periodic reports as stated in our Affiliation Agreements.

We hope you engage locally in other, less formal, types of "reporting" back to your supporters and contributors. These may include such things as:

- Personalized thank you notes and letters
- Public recognition - newspaper articles/pictures
- Invitations to and/or participation in events
- Periodic newsletter or bulletins
- ALWAYS acknowledge your contributors and show your appreciation. Inform them of your successes!

ASPSF Reporting Considerations

➤ WHO? WHEN? HOW?

- ◆ Communicate as a group and to determine who will be responsible for submitting each report. No one has to do it all!
- ◆ Reporting responsibilities can be associated with officer or committee member role (ie: Secretary should maintain Board roster for Annual Board Update, Treasurer or Selection Committee member may prepare Scholarship Award Reports, etc.) What makes sense for your organization?
- ◆ Follow-up report, in particular, may require cooperative effort among several Board/Staff members. Follow-up is VERY important!
- ◆ All required report forms are currently available on ASPSF website through the *Affiliates* link <http://www.aspsf.org/affiliates.html>

➤ Notification of Reporting Deadlines

- ◆ ASPSF office will send email notification to the Board Chair, President and/or designated staff member as a reminder of report deadlines. Please forward to the reporting designee.
- ◆ *With the roll-out of the online **Scholarship Management System (SMS)**, affiliates will be encouraged to utilize the system to enhance your record keeping and vastly reduce the amount of time required to submit paper-based reports to ASPSF. The system will do much of it for you and also provide valuable statistics and analysis to take back to your local community!*

ASPSF Reporting Calendar

- **Annual Board Update** due by April 1st
 - **Scholarship Award Reports**
 - Spring semester due by April 1st
 - Summer semester due by August 1st (*submit even if no awards are given*)
 - Fall semester due by November 1st
 - **ADHE Student Information Report** due 2 weeks after ADHE funded awards are given
 - **Annual Follow-up Report** due by April 1st
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- **Annual Board Update** due by April 1st
 - Following the election of new officers
 - Periodic updates with changes in officers, duties, members
 - 1st page cover sheet w/ Board member contact info
 - *Board updates will be managed with the first roll-out of the online "SMS"*
- **Scholarship Award Reports (3 SAR's)**
 - Ⓢ Spring semester due by April 1st
 - Ⓢ Summer semester due by August 1st (*submit even if no awards are given*)
 - Ⓢ Fall semester due by November 1st
 - Report # and amount of scholarships as soon as all awards are given out for the semester. (*Do it now so you don't have to do it later!*)
 - Submit report even if "no" scholarships awarded
 - SAR's are used to reconcile with Annual Follow-up Report
 - *SAR's will be managed with the first roll-out of the online "SMS"*
- **ADHE Student Information Report**
 - Ⓢ due 2 weeks after ADHE funded awards are given
 - ADHE student awardees MUST sign release form
 - Permission is being granted to you to release info to us
 - Recommend that you file signed release form with student's application
 - Provide complete student information in ALL required fields on form
 - *ADHE report will not be available in the first roll-out of the online "SMS"*
- **Annual Follow-up Report** due by April 1st
 - This is the key to validating success – theirs and ours!
 - Retention rate - how many are staying in school?
 - Graduation/completion rate – are they accomplishing their goals?
 - Socio-economic impact – are they employed and have they increased their earnings?
 - 1st page of report – demographics (reconcile with semester SAR's)
 - 2nd page – "meat" of follow-up: IMPACT – retention/graduation/income
 - *Follow-up can be managed with the online "SMS" through encouraging students to self-report. This could greatly reduce the work required in contacting scholarship awardees for this follow-up information.*