



Impact Report Committee Guide

Thank you for volunteering to review impact reports from Cummings Foundation grant recipients. We are most grateful for the important contributions you will make toward ensuring that current grantees are eligible for future grant payments. This guide includes information about the impact report review process. In addition, we are readily available to assist you with any questions.

Andrew Bishop, grants manager, 781-569-2337, aeb@cummings.com

Joyce Vyriotes, executive director, 781-932-7072, jkv@cummings.com

Timeline

The review of impact reports will take place Monday, April 25 through Friday, May 20.

Process

1. View your Google Doc spreadsheet (to be provided via email) for a list of impact reports to review.
2. Access the impact reports via Foundant, our grants management system (see step-by-step instructions below).
3. Review the impact reports, bearing in mind the items to watch specified below. Although not expected, you are welcome to review all or portions of the original application.
4. Enter your comments in the **Comments** column of your Google Doc spreadsheet.
 - If all appears to be in order, a simple “[DATE] – OK per [YOUR NAME]” will suffice.
 - If you have questions or concerns, or feel there is information about which the Foundation should be aware (see Items to Watch), please note accordingly.
5. Email Andrew when you have completed your Google Sheet. There is no need to email us your results, as the Google Sheet resides online, and we will have access to it.

Items to Watch

Cummings Foundation requires each grant recipient to submit an annual report describing how that year’s grant funds were used and detailing any variances or challenges. It is important that we exercise due diligence to ensure that the Foundation’s resources are being used effectively; however, we do not want to overburden grant recipients with unnecessary reporting requirements. Knowing that nonprofit professionals often work long hours and wear many hats, we intentionally designed the report to be brief, and we encourage the report authors to be concise.

Typically, the vast majority of reports do not raise any concerns. In such cases, the nonprofit will receive its next grant installment in June or, if the grant has been fulfilled, will be eligible to apply for a new grant.

When questions or concerns do arise, Foundation staff contact the nonprofit, or return the report via our online system with a request for revisions or additional information. Although it is rare, the Foundation has suspended grants due to serious concerns. Please watch in particular for the following issues:

Funds have not been spent

The Foundation never wants a grant winner to feel that it has to “use it or lose it,” which can lead to imprudent spending. Accordingly, we have no concerns when a small portion of the grant has not been expended and the grantee explains how the rollover funds will be used in the upcoming year. If, however, a large portion of the funds has not been spent, we will want to reach out for further information and discussion. If a project has been delayed, for example, we might discuss moving the next scheduled installment to the end of the grant term.

Funds have been spent in a way other than what had been planned

The Foundation is generally amenable to small variances in expenditures. Please make a note on your spreadsheet if you feel any variance warrants further discussion or is a cause for concern.

Significant changes to the organization or challenges to the project

Like for-profit businesses, many nonprofits experience staff turnover and encounter small obstacles throughout the year. Please alert us if you feel that a change or challenge is substantial enough to be cause for concern.

Questions for the Foundation

Grant winners sometimes pose questions or seek guidance through impact reports. Please alert us to any such inquiries.

Sample Comments from Committee Members

- No funds spent yet. Looking for an advocacy person, and funds will be used to compensate that hire.
- Some significant staff departures and layoffs. Some employees furloughed or switched from hourly to stipend.
- Significant fundraising and staff and student attendance issues due to the pandemic. Stated financial outlook is “bleak.”
- Not clear whether the grant-funded renovation work has begun or whether the grant money has been expended.
- New leadership but orderly transition.
- Board resolved to change legal name of org to City Lights. Mission unchanged.
- Funds not expended because COVID prevented in-person classes. Requesting to save grant funds for next year for anticipated increased demand upon resumption of in-person classes.

Viewing Impact Reports in Foundant

For data privacy and to protect the information of applicants/grantees, the Foundation does not make its grants management system user guide publicly available. Volunteers on grant selection and site visits committees are provided with access to applicant/grantee materials (e.g., letters of inquiry, applications, impact reports, site visit reports, contact records) to be well informed and adequately carry out relevant activities while representing Cummings Foundation.