



## Reporting Guidelines for our five different types of partnerships

### | Types of Funding Partnerships



#### Responsive Funding

The bulk of McConnell's charitable disbursement is done through responsive funding: applications submitted under our three focus areas and the Montreal strategy.



#### Proactive Partnership Development

On occasion, calls for proposals, or co-development of proposals with specific partners takes place.



#### Funder collaboratives

Joining with other funders to pool resources in support of a certain issue. This increases the impact beyond what a single funder can achieve alone.



#### Opportunity funds

Discretionary donations that fall outside our regular guidelines and cannot be applied for. Small grants for unique and time-sensitive needs or opportunities.



#### Program Development

Small funding to develop early-stage activities closely aligned with one of our focus areas. Potential partner might apply through a Focus Area, or may be invited to submit a proposal.

.....  
**VARIABLE: APPROXIMATELY \$100,000 - \$500,000 PER YEAR OVER MULTIPLE (2-5) YEARS**

.....  
**<\$50,000 FOR 1 YEAR**

### Report Guidelines:

### RESPONSIVE, PROACTIVE & COLLABORATIVE PARTNERSHIPS

Reports are an opportunity for a grantee to share how their work is progressing, and for the Foundation to offer feedback and insights on this progress. While we are interested in the activities that have been undertaken, we are most concerned with the learnings and impacts that have emerged from this work, and how the grantee plans to move forward accordingly.

When submitting a report, we encourage our grantees to think more about quality than quantity. This means that Progress and Final Reports should be no more than 5 pages in length - but that an even shorter length may suffice for the grantee to share their highlights. Please refer to the guidelines below for some suggestions on what information to include in a Progress or Final Report.

Along with the narrative report, we expect a financial statement that outlines how the grant has been spent to date as well as an overview of other financial contributions to the project. Submitting



the narrative report and financial statements at the same time ensures that any deviations from expected expenditures are accompanied

by context and explanation. Please note that any contingent payment installments of the grant will not be made until both documents have been received and reviewed by the Foundation.

If you have any questions about reporting, please do not hesitate to contact your designated Foundation staff member.

Your narrative reports should include elements such as:

- Key project activities undertaken (or since your last report).
- Important events or results from this project (positive and negative). These may be related to program/evaluation activities, funding models, and/or partnerships.
- Challenges that your project and/or organization has faced. For each one, explain how they were (or were not) addressed.
- “Lessons learned” that have emerged from your work. These may be related to your specific domain, organizational development, working with the Foundation, developing partnerships, etc.
- Changes that your efforts have had on the larger system that you are working in.
- Possible future directions for your work and/or what is planned for the project in the next granting period.
- Specifics regarding learnings we may have highlighted in your original grant notification letter
- General thoughts you have regarding this grant.

Your financial reports should indicate:

- how the Foundation's funds have been spent for the reporting period
- how the Foundation's funds have been spent for the term of this funding
- an overview of other financial contributions to the project.
- A budget template can be found on our website (<https://www.mcconnellfoundation.ca/report/budget-template/>)



## Report Guidelines:

### OPPORTUNITY & PROGRAM DEVELOPMENT PARTNERSHIPS

These types of supports offered by McConnell come with a lighter-touch report – these questions help us learn about your work, and also help us improve our funding practices. We invite your candid feedback - any information you provide will be kept confidential to our own internal staff team.

These can be answered by uploading a document on our online portal or via phone/video conversation with one of our staff, whatever you prefer.

If you have already prepared a final report for another funder - alternatively you can simply upload that report to the Upload Documents section in the online portal.

Your narrative/oral reports should answer the following questions:

- Describe the outcomes you're most proud of with this project.
- How has this project helped meet social and/or environmental needs?
- What were the most significant lessons you learned while doing this work over the last year?
- How might the learnings from this project affect your priorities, activities and/or forthcoming work?
- How satisfied are you with your experience of partnering with McConnell? (Scale: *Very dissatisfied / Somewhat dissatisfied / Neither satisfied nor dissatisfied / Somewhat satisfied / Very satisfied*)
- Is there any feedback on the partnership that you'd like to share?  
*Any input is welcome. For example, on the application and payment process, communications with our team, non-financial support from McConnell in your work, etc.*

Your financial reports should indicate:

- how the Foundation's funds have been spent for the term of this funding
- an overview of other financial contributions to the project (if any)
- A budget template can be found on our website  
(<https://www.mcconnellfoundation.ca/report/budget-template/>)