

## Contact Information

<b>Organization Name*:</b> (Max. Characters: 150)	
<b>Program Name*:</b> (Max. Characters: 150)	
<b>First Name*:</b> (Max. Characters: 20)	
<b>Last Name*:</b> (Max. Characters: 30)	
<b>Main Number*:</b> (Max. Characters: 20)	
<b>Email*:</b> (Max. Characters: 50)	

## Quarterly Report

<b>Population Served*:</b>	Primary population served (select one)
<b>Project Timeline*:</b>	Rate your progress on project timeline <input type="text"/> <input type="text"/> Green <input type="text"/> Yellow <input type="text"/> Red
<b>Explain Above Rating (Timeline):</b> (Max. Characters: 1000)	If red or yellow, please explain obstacles and challenges OR if green, share how you've been able to keep your project timeline on target
<b>Rate Grant Goals*:</b>	Rate your progress on meeting your grant goals of numbers served and utilization of pro bono planners. <input type="text"/> <input type="text"/> Green <input type="text"/> Yellow <input type="text"/> Red
<b>Explain Above Rating (Grant Goals):</b> (Max. Characters: 1000)	If red or yellow, please explain obstacles and challenges OR if green, share how you've been able to keep your numbers served and recruitment of pro bono planners on target
<b>Number of Workshops*:</b> (Max. Characters: 10)	Number of workshops this quarter presented by pro bono planners
<b>Number of Workshop Attendees*:</b> (Max. Characters: 10)	Total cumulative number of attendees in workshops this quarter presented by pro bono planners
<b>Number of Unique One-on-One Clients (this quarter)*:</b> (Max. Characters: 10)	Enter the total number of one-on-one sessions done this quarter by pro bono planners (for example 5 unique clients: 3 had one session and 2 had two sessions with pro bono planner, enter 7)
<b>Number of One-on-One Sessions (this quarter)*:</b> (Max. Characters: 10)	Enter the total number of one-on-one sessions done this quarter by pro bono planners (for example 5 unique clients: 3 had one session and 2 had two sessions with pro bono planner, enter 7)
<b>Other Metrics*:</b> (Max. Characters: 500)	Other than the metrics identified above (number of one-on-ones, workshops), what will be considered successful outcomes for the individuals in your program (for example, higher credit score, improved financial literacy, increased savings, reduced debt, improved confidence). Briefly describe how you will measure these outcomes and provide specific goals. We will circle back to these goals in the Q4 report to learn about your progress.
<b>Materials/Tools*:</b> (Max. Characters: 1000)	Describe the financial planning materials/tools used
<b>Number of Pro Bono Planners*:</b>	

<b>(Max. Characters: 10)</b>	Enter the number of pro bono planners that served this quarter
<b>Names*: (Max. Characters: 1000)</b>	Pro Bono Planners' Names and Designations
<b>Number of Pro Bono Hours*: (Max. Characters: 10)</b>	Number of pro bono hours contributed this quarter (in one-on-one sessions and workshops)
<b>Describe a successful pro bono financial planning situation*: (Max. Characters: 1000)</b>	Describe a successful pro bono financial planning situation with a client (stories may come from the client or the planner perspective). <i>What was their circumstance/situation before financial planning, who was involved in the process, what help did they receive and what was the outcome?</i>

### Upload Documents Below

You can upload or link to sample assets, resources, pictures, etc.

Type		Name	Size	Updated
Document 1				
<b>Notes</b>				
Document 2				
<b>Notes</b>				
Document 3				
<b>Notes</b>				
Document 4				
<b>Notes</b>				