**Coach Foundation**

* **Region:**National (original request submitted by Derek/NY)
* **Due date:**every quarter- *​​​​​​​****confirm due date with Derek***
* **Point of Contact:**Derek Leonard
* **Target Population:**Access + Success
* First [data request](https://bottomline.kanbanize.com/ctrl_board/3/cards/769/details/)processed by KS on 10/2020
* **Watch out for:**
  + High dependence on transactional data
  + High number of proxies
  + Data elements reported by different parts of the org (i.e. employment outcomes, budget details, volunteer activities)

**Overview**

This national funder report covers both the Access and the Success programs. The outcomes of this report follow a template provided by the funder (fig.1). The final product uses a mix of transactional data along with Student Progressions data.

Figure 1

**Report Elements**

A combination of SF reports were used to produce these numbers

1) [Coach Foundation-Success-SP-10/2020](https://na88.lightning.force.com/lightning/r/Report/00O1Y000007HXfiUAG/view)

* **Report Type**
  + Student Progressions with Success Program Record Lookup
* **Filters**
  + Current Success Academic Year = 2019-20
* **Success Program Record Lookup: ProgramRecordID18**
  + Unique Count will give total number of Success students served during the year
* **Success Program Record Lookup: Cumulative College GPA**
  + Transactional data
  + Check for outliers and zeroes and exclude them before running the average
  + Use formula/aggregation in Excel/PBI to get average Success GPA across regions
* **Race**
  + Report calls for 5 racial breakdowns [White, Black, Latinx, Asian, & Multiracial/Other(s)]
  + Field is "select all that apply"
  + Transform in Excel/PBI to make multiple selections show "Multiracial/Other(s)"
* **Graduation Year (Numeric)**
  + Filter in Excel/PBI for <> "" to get number of graduates across the organization
* **Last or Most Recent Loan Total**
  + Filter by Graduation Year (Numeric) first
  + Use formula/aggregation in Excel/PBI to get average student financial debt at graduation

2) [Coach Foundation-Success-PYPR-10/2020](https://na88.lightning.force.com/lightning/r/Report/00O1Y000007HXfOUAW/view)

* **Report Type**
  + Program years with Program Record
* **Filters**
  + Academic Year = 2019-20
* **Program Record: ProgramRecordID18**
* **Program Year: Program Year Name**
* **Program Record: Program Site**
* **Program Record: Stage**
* **Pell Grant**

3) [Coach Foundation-Access-SP- 10/2020](https://na88.lightning.force.com/lightning/r/Report/00O1Y000007HXd3UAG/view?queryScope=userFolders)

* **Report Type**
  + Student Progressions with Access Program Record Lookup
* **Filters**
  + Access Academic Year = 2019-20
* **Success Program Record Lookup: ProgramRecordID18**
  + Unique Count will give total number of Success students served during the year

4) [Coach Foundation-A+S-BLPR-10/2020 v2](https://na88.lightning.force.com/lightning/r/Report/00O1Y000007HXgbUAG/view?queryScope=userFolders)

5) [NY Access 2019 - 20 Pell](https://na88.lightning.force.com/lightning/r/Report/00O1Y000007HXeQUAW/view?queryScope=userFolders)

6) Outcomes Dashboard FY2020

1. **Number of Students Enrolled in the nonprofit (current)**  
   For Access & Success, total number of students enrolled in program.  
   Breakdowns by: (1) National [total], and (2) Region.   
     
   **From Student Progressions:** Unique count of ProgramRecordID18