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**Social Venture Partners Vancouver**

**Investee Quarterly Report**

**Reporting Dates for Lead Partners (please check applicable date):**

 **🞎 Q4 2013 – Due Jan 21 🞎 Q1 2014 – Due Apr 21 🞎 Q2 2014 – Due July 21**

**🞎 Q3 2014 – Due Oct 21 - 🞎 Q4 2014 – Due Jan 21**

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| --- | --- |
| **Investee:** | **Contact Name:** |
| **Lead Partner(s):**  | **Partner Engagement Team Members:** |
| **Approximate Lead Partner Hours for Quarter:** | **Approximate PET Volunteer Hours for Quarter:** |

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| --- | --- | --- | --- | --- |
| **Investee’s SVP Annual Goals** | **Target** | **YTD Actual** | **On Track** | **SVP Contributions / Comments** |
| **Quantitative Annual Goal** |  |  | **YES****PPARTIAL****NO**  |  |
| **Quantitative Annual Goal** |  |  | **YES****PPARTIAL****NO**  |  |
| **Qualitative Annual Goal** | **YES****PPARTIAL****NO**  |  |
| **Qualitative Annual Goal** | **YES****PPARTIAL****NO**  |  |

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| **THIS Quarter Milestones** | **Target** | **QTR Actual** | **On Track** | **SVP Contributions / Comments** |
| **Quantitative Milestone** |  |  | **YES****PPARTIAL****NO**  |  |
| **Quantitative Milestone** |  |  | **YES****PPARTIAL****NO**  |  |
| **Qualitative Milestone** | **YES****PPARTIAL****NO**  |  |
| **Qualitative Milestone** | **YES****PPARTIAL****NO**  |  |

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| **NEXT Quarter Milestones** | **On Track** | **SVP Contributions / Comments** |
| **Quantitative Milestone** | **YES****PPARTIAL****NO**  |  |
| **Quantitative Milestone** | **YES****PPARTIAL****NO**  |  |
| **Qualitative Milestone** | **YES****PPARTIAL****NO**  |  |
| **Qualitative Milestone** | **YES****PPARTIAL****NO**  |  |

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| **KEY Questions** | **Response** | **Comments / Recommendations** |
| *Is the Investee facing any financial difficulties that impede its ability to operate or meet its goals?* | **NO****PSOME****YES**  |  |
| *Is the Investee experiencing any extraordinary circumstances or challenges that are having a negative effect or require a chance in direction?* | **NO****PSOME****YES**  |  |
| *Are there any concerns you have regarding the Investee’s ability to meet its goals?* | **NO****PSOME****YES**  |  |
| *Is SVP delivering on its commitments?* | **YES****PSOME****NO**  |  |
| *Are there requests for help that SVP is unable to support?* | **NO****PSOME****YES**  |  |
| *Does the organization require additional funding to achieve its goals or milestones in the coming quarter?* | **NO****PSOME****YES**  |  |

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| **Achievements / Events / Other Updates** **this Quarter**: *Use this section to list and describe organizational achievements, event, or other updates. For example: fundraising events (past and upcoming), new partnerships, other funders, in-kind support, other resources secured by SVP, etc.* |
| **Achievement / Event / Other** | **Comments** |
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*Investee Quarterly Reports are required for updates to SVP Board and Co-funders. Please email report and any supplementary materials to: Tanya Oliva, Executive Director:* *toliva@svpvancouver.org* *by the deadline specified on page one.*