**GRANTEE INTERIM NARRATIVE REPORT OUTLINE**

**(https://www.luminafoundation.org/grantee-reporting-forms)**

**Lumina Foundation Issued Grant Number:**

**Grant start date:** Click here to enter a date. **Grant end date:** Click here to enter a date.

**Period covered by report:**

## Legal Name of Organization:

**Common Name of Organization:**

**Project Director (Or person who prepared this report):**

**Date:**

##### ***Progress on* M*etrics and* Outcomes**

***Every grant will have at least one implementation metric***.

***Some grants are not required to report on outcome metrics*.** Please review your proposal for possible (if any) outcome metrics tied to your grant.

1. Implementation Metrics
   1. Which (one) implementation metric listed below did you **select in your proposal as the** ***primary metric*** that aligns most closely with your work?
      1. Research and develop resources, frameworks, and agendas to inform policy and practice strategies and solutions
      2. Build awareness and alignment with policy and practice solutions among key stakeholders
      3. Equip and build the capacity of partners to implement evidence-informed policy and practice solutions
      4. Support partners to implement and refine evidence-informed policy and/or practice solutions
      5. Release solutions by ending work, transitioning ownership to existing organizations or seeding new organizations
   2. Do you need to change your primary implementation metric selection at this time? (yes/no)
   3. If yes, please explain which implementation metric better aligns with the work now and why.
   4. How would you characterize the progress of the work toward the primary metric?
      1. Less than expected
      2. On track
      3. More than expected
   5. If on track / more than expected to date, what key factors have enabled you to continue progressing toward this implementation metric? Select the top three (3) factors.
      1. Access to data
      2. Internal partnerships / buy-in
      3. External partnerships / buy-in
      4. Mission alignment
      5. Building on existing effort(s)
      6. Communications
      7. Capacity of organization(s)
      8. Policy window
      9. Supportive Context
      10. Successful recruitment (schools, students, partners, etc.)
      11. Other (please explain)
   6. If less than expected, what challenges or obstacles are you facing that have hindered progress toward the implementation metric? Select the top three (3) factors.
      1. Data access challenges
      2. Internal partnership / buy-in challenges
      3. External partnership / buy-in challenges
      4. Communications challenges
      5. Capacity challenges
      6. Policy barriers/challenges
      7. Unsupportive context
      8. Challenges with recruitment (schools, students, partners, etc.)
      9. Other (please explain)
2. Outcome Metrics
   1. Which outcome metric(s) listed below did you **select in your proposal** that aligns most closely with your work?
      1. Increase student enrollment/re-enrollment
      2. Increase student retention/persistence
      3. Increase student completion
      4. Increase employment aligned credentials of value
      5. Not applicable (if “Not Applicable”, skip the remaining questions in the “Outcome Metrics” section)
   2. Do you need to change your primary outcome metric selection at this time? (yes/no)
   3. If yes, please explain which outcome metric better aligns with the work now and why.
   4. How would you characterize the progress of the work toward the outcome metric you selected above?
      1. Less than expected
      2. On track
      3. More than expected
   5. If on track / more than expected to date, what key factors have enabled you to continue progressing toward or to meet the outcome metric? (Enter "Not Applicable" if there are no metrics.)
      1. Access to data
      2. Internal partnerships / buy-in
      3. External partnerships / buy-in
      4. Mission alignment
      5. Building on existing effort(s)
      6. Communications
      7. Capacity of organization(s)
      8. Policy window
      9. Supportive Context
      10. Successful recruitment (schools, students, partners, etc.)
      11. Other (please explain)
      12. Not Applicable
   6. If less than expected, what challenges or obstacles are you facing that have hindered progress toward the outcome metric? (Enter "Not Applicable" if there are no metrics.)
      1. Data access challenges
      2. Internal partnership / buy-in challenges
      3. External partnership / buy-in challenges
      4. Communications challenges
      5. Capacity challenges
      6. Policy barriers/challenges
      7. Unsupportive context
      8. Challenges with recruitment (schools, students, partners, etc.)
      9. Other (please explain)
      10. Not applicable
   7. What are the target populations you identified for this work in your proposal? Please select up to the three (3) that apply.

|  |  |
| --- | --- |
| ☐ Adults | ☐ Military/Veterans |
| ☐ Black/African Americans | ☐ Native Americans |
| ☐ Females/Age Unspecified | ☐ Returning Adults/Some College No Credential |
| ☐ First Generation Students | ☐ Rural |
| ☐ Hispanic/Latinos | ☐ Students –General |
| ☐ Immigrants/New Comers/Refugees | ☐ Transfer Students |
| ☐ Low-Income | ☐ Other: *(please explain)* |
| ☐ Males/Age Unspecified |  |

* 1. How is this work contributing to fair and improved postsecondary outcomes and experiences for the populations identified above?

**Major Changes**

1. Have any changes occurred within your organization and/or outside your organization that have impacted the work supported by the grant (e.g., in the community, in your local government, etc.) since your last report? (yes/no)
2. If yes, please describe the changes and any plans to manage these changes.

**Evaluation**

If applicable provide copies of any evaluation reports completed during this reporting period.

**Communication**

1. Provide an update on the project communication plan outlined in your proposal.
2. Provide copies of any media coverage or communication products developed during this period.

**Sustainability**

Provide an update on the status of the sustainability plan outlined in your proposal.

**Financial Report**

Use the accompanying budget template to indicate how Lumina grant funds have been spent

according to the categories submitted in the proposal budget.

As you make your plans for the next reporting period, remember that you will need the Foundation’s approval for line-item changes greater than 10 percent or $5,000. (*Refer to Section 10.d. of your grant agreement.*) Indicate any anticipated changes and explain any budget variances. Consider if a budget modification or no-cost extension may be necessary. Requests for grant modifications should be submitted on official letterhead and include a modified budget.

**Staff Changes**

Please report any staff change related to this grant.

Name:

Title:

Email and phone:

Address if different than the organization’s primary location:

Name, title and role of individual no longer working on this grant:

Check here if this person is no longer with the organization: