GRANTEE FINAL 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 Metrics 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 implementation metric listed below did you **select in your interim report 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 metric better aligns with the work now and why.
   4. Did you make the progress you expected to make toward the primary metric you selected above? (yes/no)
   5. If yes, what key factors enabled you to meet or exceed the 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 no, what challenges or obstacles hindered progress toward the 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. Did you make the progress you expected to make toward the primary metric you selected above? (yes/no)
   5. If yes, what key factors enabled you to meet or exceed the metric? Select the top three (3) factors: (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 no, what challenges or obstacles hindered progress toward the metric? Select the top three factors: (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.

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| --- | --- |
| ☐ 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 did this work contribute to fair and improved postsecondary outcomes and experiences for the populations identified above?
  2. If applicable, comment on any longer-term outcomes you anticipate from your Lumina-funded project. Also, please estimate anticipated achievement dates (month and year).

#### Evaluation and Communication

1. If applicable, provide a summary of your evaluation activities and/or results, if available. If applicable, please attach copies of all evaluation reports produced since your last Lumina report.
2. If applicable, provide a summary of your communication activities and/or results, if available. Please attach copies of all communication products produced since your last Lumina report.

**Impact and Lessons Learned**

Comment on the impact and lessons learned related to this grant.

1. Please briefly describe the key strategies and activities implemented during this grant period that worked and why.
2. Please briefly describe the key strategies and activities implemented during this grant period that did not work and why.
3. What were the most important accomplishments and/or lessons learned from this project, and how will these inform your future work and/or the work of others?
4. What did you learn about the target populations identified in your effort?
5. What additional questions or insights about student postsecondary attainment did this project raise?

**Financial Report**

Using Lumina’s budget template, please account specifically for the use of Lumina grant funds and indicate how these funds have been spent according to the categories submitted in the proposal budget.

Lumina does not require the return of unspent grant funds, provided that these funds are no more than $1,000 and that the balance is used for the grant purpose. The total for unspent funds includes any remaining earned interest. Please note any unspent funds in your financial report and indicate the grant-related purpose for which you will use the funds if retained. No further report on the funds is required.

If unspent funds are more than $1,000, you may request a no-cost grant extension of up to one year to spend the funds, or you may choose to return the unspent funds to the Foundation. Please submit any budget modification or no-cost extension requests on official letterhead, specify the grant-related purpose for which the funds will be used and include a revised budget. *A no-cost extension must be requested* ***before*** *the expiration date of the grant, not by the due date for final reports.* A final accounting will be required upon the conclusion of the grant-extension period.