**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:**

## Progress on Goals, Activities and Timeline

1. Outlined in your proposal (under “Outcomes Measurement and Assessment”) is a list of performance indicators used to measure progress toward your outcomes. Please provide the current data toward each indicator. Note and explain where targets have not been met or have far exceeded expectations.
2. How has the project and its outcomes contributed to improved outcomes for Black, Hispanic or Native American learners?
3. Note and explain any activities or indicators that have changed since the initial plan.

**Metrics**

Please select the metric(s) that correspond with the goals of the work. These metrics do not need to be what was originally indicated at the proposal.

1. Output Metrics*:*
   1. Produce evidence, data, research and/or tools and resources to inform strategy, policy, and/or practice.
   2. Build awareness, support and alignment with evidence-based solutions and commitments among key influencers, systems, states, or other organizations.
   3. Build capacity and/or infrastructure among key actors, institutions, systems, states, or other organizations to implement evidence-based solutions.
   4. Implement evidence-based solutions at institutions, systems, states, or other organizations aimed at increasing enrollment, persistence, completion, and/or career outcomes for learners.
   5. Scale policy or practice change at institutions, systems, states, or other organizations aimed at increasing participation, student success, or employment-aligned credentials.
   6. Not applicable.
2. Outcome Metrics:
   1. Increase enrollment/re-enrollment of students, primarily for each racial equity population.
   2. Increase retention/persistence primarily for each racial equity population.
   3. Increase completion, primarily for each racial equity population.
   4. Increase credentials that are aligned with employment and labor market demand.
   5. Not applicable.
3. If on track / more than expected to date, what key factors have enabled you to continue progressing to your goal / complete your goal?
4. If less than expected, what challenges or obstacles are you facing that have hindered progress toward the goal?
5. If you have identified any outcome metric(s), please attach your metrics to the record.

The template for metric reports can be found under the "Information / Funding Opportunities / Metrics Forms" in the grantee portal.

**Major Changes**

1. Describe changes occurring within your organization and/or outside your organization that have an impact on the work supported by the grant (e.g., in the community, in your local government, etc.) since your last report.
2. Describe how you have responded or plan to respond to 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.

**Lumina Relationship**

Given your experience working with Lumina on this grant, how can Lumina be a more supportive partner to help you reach your outcomes?

**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:

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

**Date:** Click here to enter a date.