

SLSC FINAL REPORT (only 11/16/2018 and 5/17/2019) M-Y**SLSC Reporting Form - FINAL REPORT**

Organization Name

Do not change name listed below. If organization's name is now different, contact the Foundation after submitting this form.

Address

City State
<None >

Postal Code

Date Grant Awarded:

Total Amount of Grant:

Title of Project:

Today's Date:

The Foundation requires that the grantee submit, in their ZSR online account, a Final Report three months from the end of the grant period. Unless otherwise stated in the Grant Resolution, the grant period ends in December of the final grant year. All reporting requirements are described in the Grantees Acceptance and Understanding (GAU) form. The grantee can find the Grant Resolution at the top of page 1 of the GAU form. In item 7, the GAU form states "The Grantee will submit a full and complete written Final Report to the Foundation no later than three months after the end of the grant period. If the grant period is extended, the Final Report will be due three months after the end of the extended grant period. The Final Report will describe the progress made in accomplishing the purposes of the grant and provide a complete financial accounting of the grant expenditures in accordance with the agreement."

1. Have all of the grant funds been spent?

If no, what is the amount to be returned to the Z. Smith Reynolds Foundation?

(If the remaining grant balance is \$25 or less, no funds need to be returned.)

Anticipated return date:

FINANCIAL REPORTING

FOR GENERAL OPERATING SUPPORT GRANTS ONLY:

2a. Please upload a copy of your organization's actual revenue and expenses for the fiscal year(s) of the grant that have been completed (one page per year). If ZSR funds were used in a more specific way, please state that on a separate page and include it in the upload, as well.

(Please use the Attachment Page (tab 2) to upload this information to your final report.)

FOR PROJECT SUPPORT GRANTS ONLY:

2b. Please upload an updated project budget providing actual revenues and expenses as well as indicating how ZSR funds have been spent.

(Please use the Attachment Page (tab 2) to upload this information to your final report.)

NARRATIVE REPORTING

3. Please briefly describe the goals, outcomes, or benchmarks you intended to achieve at the beginning of the grant period and the progress or work you did toward them during the grant period.

4. Please describe how your work and progress contributes to state-level systemic change.

5. If applicable, describe how your strategies and approaches have been revised or refined during the grant period.

6. Please describe any lessons learned or challenges/opportunities you experienced and how you responded. Is there anything you would do differently next time?

List any other funds or in-kind resources, by source and amount, your organization received during the course of this grant. If yours is a project grant, please only state funding or in-kind resources contributed toward the project.

Optional Narrative (For General Operating Support and Project Grants):

7. Please share with us a story that exemplifies how this grant has made a difference. Stories should demonstrate individual or collective impact. Narratives should be no longer than one single-spaced, typed page. Photos, videos and other audiovisuals to accompany your story are encouraged. If you would like to submit photos or audiovisuals, at the end of the narrative please include the statement "WE have photos or audiovisuals" along with a contact name and email address and we will follow up. Please note that by submitting a narrative and/or audiovisuals, you are giving the Foundation permission to use and publish any portions of these items.

(Please use the Attachment Page (tab 2) to upload this information to your final report.)

DIVERSITY NARRATIVE REPORTING

THIS SECTION ONLY FOR GRANTEES REQUIRED TO SUBMIT A BOARD DIVERSITY PLAN:

Grant Resolutions

Multi-year Grantees who were required to submit a Board Diversity Plan before they could receive their first payment, must report on progress made toward implementing their Board Diversity Plan. Not all grantees were required to submit a Board Diversity Plan. The Grant Resolution printed above indicates if a Grantee was required to submit a Board Diversity Plan.

- If the Grant Resolution above states that "payment of this grant is contingent on staff's receiving and approving a diversity plan from the Grantee" or language similar to that, *then you must complete questions 8, 9 and 10.*
- If the Grant Resolution above DOES NOT state that "payment of this grant is contingent on the staff's receiving and approving a diversity plan from the grantee" or language similar to that, *then you DO NOT need to answer questions 8, 9 and 10.*

If you cannot determine if your organization had to submit a Board Diversity Plan

please contact the Foundation at info@zsr.org.

As part of its core values, the Z. Smith Reynolds Foundation is committed to diversity, inclusion and equity. In particular, as part of the *All For NC: ZSR's Framework for Grantmaking and Learning*, the Foundation has expressed a commitment to use a racial equity lens across all of its strategies. ZSR believes that a person's racial identity should not be a predictor of that person's life outcomes and that, as a result, organizations and institutions must use a racial equity lens in order to understand and evaluate the complex systems within which North Carolinians live and work. In a sector focused on improving social outcomes across a wide range of issues, ZSR believes that racial equity must be centered as a core goal of social impact across the philanthropic and nonprofit sectors in order to achieve North Carolina's true potential.

While the work of racial equity is bigger and deeper, the Foundation believes that racial diversity and inclusion are important precursors to promoting racial equity. ZSR views diversity as a collection of both differences and similarities in a group, whether based on characteristics such as race, gender, age, or a range of other identities or experiences. Inclusion means ensuring that traditionally excluded individuals and groups (such as people of color, women, and immigrants) are authentically engaged in participatory processes and activities in a way that shares decision-making power and embraces their voices. It is the desire of the Foundation that all of its grantmaking policies reflect the belief that an organization's performance is greatly enhanced when people with different backgrounds and perspectives are engaged in an organization's activities and decision-making processes. Therefore, ZSR seeks to ensure that all of its State-Level Systemic Change grantees have made reasonable efforts to put together governing boards that are reflective of the communities served.

Grantees should review their Board Diversity Plan in their online ZSR account. The below questions are for the Grantee to describe progress made toward the goals and strategies in the Board Diversity Plan.

8. Progress Toward Goals and Strategies Outlined in the Board Diversity Plan:

Please list up to five goals/strategies from your Board Diversity Plan. (up to 700 words)

- a. For each listed goal/strategy, briefly explain the progress made.
- b. For each listed goal/strategy, please describe any challenges your organization faced or modifications made to the initial goals and strategies.

9. Learning:

Please share what your organization has learned during the implementation and evaluation of your Board Diversity Plan. Aspects may include, but are not limited to:

(up to 500 words)

- Board readiness regarding increasing board diversity
- Outreach and recruitment process
- Changes made by the organization regarding structural barriers for participation of diverse board members – e.g., board meeting times, committee requirements, giving requirements, etc.

- Strategies for increasing awareness among staff and board around diversity, inclusion, and equity
- Any other component that you think will help ZSR to understand the progress made.

10. Resources:

Please share the types of resources that have been helpful in advancing the goals of your Board Diversity Plan—e.g., tools on ZSR's website or from other organizations, technical assistance, coaching, etc. (up to 250 words)

SAMPLE