



Final Report Guidelines

The Meyer Foundation team values our partnership with you and your organization. We hope that this report provides a mechanism for you to convey the impact you have had over the last year as well as the challenges you face and lessons learned in the process. We value transparency and recognize that nonprofit organizations are working in a changing environment that can both present unexpected hurdles and open unexpected opportunities. The purpose of the report is to allow you the opportunity to share your journey over the last year.

I. Report on Objectives

While the Meyer Foundation primarily awards general operating support grants, we asked you to propose specific, measurable objectives and outcomes in your original proposal. Each objective listed in your proposal appears in the online report form. For each objective, please let us know how successful you were at achieving the outcome (*Highly Successful, Successful, Somewhat Successful, Not Successful, Don't know/Unable to determine*) this year. Below each, please summarize, in 1-2 paragraphs, your impact against that objective, specific examples, and data that evidences your impact.

II. Narrative Report

Please upload a narrative report, of no more than four pages, that addresses the following questions:

1. How are your strategies addressing systemic sources of inequity?
2. What is the evolving context in which you are working? What internal challenges are you facing? What external trends (local, political, "on the ground," and/or emerging social issues, etc.) affect opportunities and barriers to accomplishing your objectives?
3. The Meyer Foundation believes that systemic change is most likely to be achieved and sustained through the combined efforts of networks of organizations using multiple strategies and working together towards aligned goals. Who have you collaborated with this year in achieving these results and what was the unique role or strengths your organization brought to these collective efforts?
4. Have there been any unanticipated changes in your organization or the project since the grant was awarded (i.e., executive leadership, board, financial challenges, facilities, location)?
5. As applicable, describe any plans for moving forward. What, if anything, will you do differently?

III. Optional Questions

These may or may not fit for you at this stage. Feel free to respond to one, all or none in your narrative:

- A. Is there a story, example or message related to [Advancing Equity through Systems Change](#) that you would be interested in seeing profiled by the Meyer Foundation? Tell us a little about it...
- B. Are there other ways that the Meyer Foundation could support our shared goals more effectively outside of the grantmaking (convening, communications, other collaboration)?

IV. Financial Report

Please upload the following financial documents:

1. **Financial statements for the fiscal year(s) in which the grant was expended.** Please include both a statement of activities (sometimes called an income statement or profit & loss statement) and a balance sheet (sometimes called a statement of financial position).
2. **Financial report on the organization's budgeted vs. actual income and expenses** for the most recently completed fiscal year.
3. **For program or project support grants only (not general operating support grants): Financial report for the funded work**, showing budgeted vs. actual income and expenses. The timeframe of this report should be consistent with the budget submitted with your original request.

Accessing the Online Reporting Portal

To submit your report, click the **Account Login** button at the top of Meyer's homepage (www.meyerfoundation.org). Log in and navigate to the **Requirements** tab, where you can find the link to upload your report documents.



The screenshot shows the Meyer Foundation's online reporting portal. At the top, there is a navigation bar with the Meyer Foundation logo and the text "Meyer Foundation". Below the logo, there is a user account section with "Account: user@email.com" and "Last Log in: 8/5/2014 11:07 AM GMT-05:00". To the right, there are links for "How to Apply", "Online Application Instructions", "Contact Us", and "Exit".

The main content area has two tabs: "Applications" and "Requirements". The "Requirements" tab is selected and highlighted. Below the tabs, there is a red arrow pointing to the "Requirements" tab with the text: "Click on the Requirements box to see your grant reports that are due." To the right, there is another red arrow pointing to a dropdown menu labeled "Show" with "New Requirements" selected, and the text: "Make sure you are showing the correct reports - submitted, in progress, or new." Below the dropdown menu, there is a checkbox labeled "Hide Viewer Only Requirements".

Below the navigation and dropdown menus, there is a table with the following columns: "Form Name", "Project Title", "Type", "Updated", "My Role", and "Action". The table contains one row with the following data:

Form Name	Project Title	Type	Updated	My Role	Action
Final Report	to support general operations	Final Report	08/05/2014	Owner	

A red arrow points to the "Final Report" link in the table with the text: "Click on the report link to begin working on the report."

Thank you for sharing your insights and progress with us!