

Monitoring, Evaluation and Learning (MEL) FAQ

This FAQ provides guidance for grantees completing required monitoring, evaluation, and learning reporting. It outlines key reporting timelines, submission expectations, and available resources to help organizations prepare and submit accurate final reports.

Reporting Timeline

When is my final report due?

Your final report due date is listed in your grant acknowledgment or grant agreement, unless the Truist Foundation team has provided different guidance.

When will I receive access to the report?

Your report will automatically become available in Benevity **30 days before your reporting due date**. At that time, you will receive an email from Versaic Mail (noreply@system.versaic.com) with instructions for accessing your report. If you do not see the email, please check your spam or junk folder.

If you would like access to the report earlier, you may request that it be released ahead of schedule by contacting the Truist Foundation team at truistfoundation@truist.com. Receiving the report early **does not change your reporting deadline**.

What is the reporting period?

The reporting period begins on the date your organization receives the grant acknowledgement and continues through your report due date. The information included in your final report represents a snapshot of your organization's progress and outcomes during that reporting period. We recognize that the work supported by the Truist Foundation may continue to generate impact beyond the report due date, and that additional outcomes may emerge over time.

Will my progress be saved if I complete the report over multiple sessions?

Yes. While completing the report, select the "Save and Close" button at the bottom of the page to save your progress and return later.

Reporting Guidance

What if my organization doesn't track certain data required in the report?

If your organization does not track data for a required question, you will need to enter 0 to proceed with the report. However, we strongly encourage organizations to begin tracking as

many of the required data points as possible during the grant period. If collecting the exact measure is not feasible, consider identifying a meaningful proxy so your report reflects the fullest picture of your organization's impact.

What if program participants are hesitant to share certain information?

We understand that some requested data depends on participants choosing to provide information, and response rates may vary. If this affects your reported data, please use the open-ended questions throughout the report to provide additional context and explain any limitations.

Some of the indicators don't feel fully aligned with our program. How should we approach reporting?

Please answer the indicators to the best of your ability and use the open-ended questions throughout the report to provide additional context about your organization's impact.

We also welcome feedback on how the indicators could better reflect programs like yours in the future. You may share suggestions in the report itself or by emailing truistfoundation@truist.com.

Program Changes

What if our organization needs to adjust the project budget or goals during the grant period?

Truist Foundation understands that the amount of funding awarded may be different from what was originally requested, which can naturally lead to changes in the project budget, goals, or projected impact. These differences will not affect future funding decisions where there are clear reasons - for example:

- Differences in the funding level requested versus awarded
- Staffing changes
- Emerging needs
- External factors

Are no-cost extensions available?

Yes. No-cost extensions may be approved on a case-by-case basis. To request a no-cost extension:

- Contact the Truist Foundation team, at truistfoundation@truist.com.
- Please include a brief explanation of the requested change and the reason for the request.

If approved, your reporting timeline will be updated, and you will be notified of your new reporting dates.

Transparency and Future Funding

Will unmet goals affect our chances of receiving future funding?

As long as unmet goals are accompanied by an explanation, your reported results will *not* negatively affect future funding opportunities.

How transparent should we be if we did not meet all of our goals?

Truist Foundation understands that unforeseen challenges may occur during the grant period that prevent your organization from achieving the goals initially set in the application. There are opportunities in the report to provide open-ended explanations towards any unmet goals during the grant period, and Truist Foundation encourages you to be fully transparent in your reporting. Accurate and transparent reporting will help the Foundation team better understand your organization's unique experience and will help inform the team of any common challenges experienced across the portfolio.

General Questions

I'd like someone from the Truist Foundation to attend one of our grant events. Who should I contact?

Please email truistfoundation@truist.com to discuss your event and request Foundation participation.

Who should I contact if I have additional questions?

Please review the [Monitoring, Evaluation and Learning \(MEL\) Guidebook](#) on the Truist Philanthropy Grant Submission Portal: <https://truist.versaic.com/login>. If you still have questions, please email truistfoundation@truist.com.

Additional Resources

General Grantee Questions, Including No-cost Extension Requests

- Truist Foundation: truistfoundation@truist.com

Truist Foundation Website

- truistfoundation.org

Benevity Portal Login Link

- <https://truist.versaic.com/login>

Other Reporting Questions

- Amelia Conrad, Senior Director (Frontier Design): amelia@fdg-llc.com