

# Truist Foundation Grantee Monitoring and Reporting Guidebook

Updated March 2025



Truist Foundation is excited to partner with your organization to create positive impacts in local communities.

This packet lays out the basics of reporting for Truist Foundation grantees. You will find reporting requirements, questions, indicators, and deadlines in it. We hope this provides clarity on what we will ask of you over the grant period. As always, we are available if you have any questions.

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# Truist Foundation Monitoring, Evaluation, and Learning (MEL) Guiding Principles

- 1 Right-sized**  
The value of data collected must exceed the cost to collect it.
- 2 Actionable**  
Do not collect unnecessary data that will not be used.
- 3 Impact and outcome-focused**  
Measure meaningful outcomes and impacts, not vanity metrics.
- 4 Learning-centered**  
Build on what others have learned; don't start from scratch.
- 5 Minimize cost and burden**  
Limit burden on grantees and staff by designing targeted and efficient data collection approaches.
- 6 Ethical**  
MEL respects the individuals, organizations, and communities providing data and stories.





# Truist Foundation Strategic Pillars



**Vision:** Truist Foundation strives to inspire and build economic mobility and wealth building for underserved communities

## Building career pathways to economic mobility



*Enable and equip frontline workers and unemployed adults with the tools and resources they need to move into middle-skill jobs that provide economic mobility and more pathways for people to thrive.*



Help workers navigate resources



Support reskilling and upskilling initiatives



Field building



## Strengthening small businesses

*Strengthen the supports that allow small businesses to become more financially sustainable and resilient by eliminating structural barriers to growth and improving knowledge sharing, collaboration, and innovation within the small business ecosystem.*



Increase access to capital



Increase access to technical support, education, and networks



Strengthen small business ecosystems

# Guidebook Navigator

Does your Truist Foundation-supported work align with either of the two strategic pillars outlined on slide 4?

- Yes.....Please review slides 6 - 26
- No.....Please review slides 28 - 37



# Guidance for Pillar-Aligned Grants

# Guide to this Section

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# Monitoring & Reporting – Activity Descriptions

Large (Lg): \$500K and above  
Medium (Me): less than \$500k

Pillar-Aligned

Mar

Jun

Oct



## Kick-Off Meeting

Initial meeting (virtual) with stakeholders to kick off the project, review timelines, project goals, and upcoming activities. Additionally, MEL reporting requirements and required indicators will be reviewed and finalized, and any concerns around meeting these requirements will be discussed.

Lg

Expected time to complete: 30-60 minutes



## Project Status Meetings\*

Meeting (virtual) to check in with the Truist Foundation team on grant progress, accomplishments, upcoming activities, and challenges faced. The progress update will be the basis for the discussion. No slides are required. Questions that arise mid-cycle will be saved for this meeting. Grantees may see these meetings referred to as Quarterly, Mid-Year, or Annual Meetings.

Lg

Expected time to complete: 30-60 minutes



## Project Progress and Indicators Report\*\*

Concise update on key activities completed, progress against each of the grant goals, grant spending (budget vs. actual by category), lessons learned, risks/challenges, and key accomplishments. This update will also include the submission of progress (via report link) for output and outcome indicators tailored to the grant size and activities.

Lg

Expected time to complete: 2-3 hours



## Final Grant Report

Comprehensive report that discusses project accomplishments, impacts, stories, and lessons learned. For grants under \$500K, the requirements for this report will be limited to essential elements with reduced free-form narrative inputs. Expected time to complete depends on grant size and scope.

Lg

Me

Expected time to complete: 2-6 hours

\*Quarterly, Semi-Annual or Annual depending on grant amount  
+Required annually for multi-year grants



# Reporting Cadence – Grants Approved in March

Pillar-Aligned

Mar

The table below indicates the timing for our monitoring and reporting requirements. Truist Foundation will send invites and reminders for each event as needed. In most cases, the grant payment will occur within two months of grant approval, and the grant activities will start in month 3 or 4. This calendar displays the timeline for the grants approved in March.

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
	March	April	May	Jun	July	Aug	Sep	Oct	Nov	December	Jan	Feb	Mar	April	May	June
Large (\$500k and above)	Grant Approval	Grant Kick-Off Meeting								Progress Report (Single Year Grants)						Final Report
										Status Meeting						Progress Report (Multi-Year Grants)
																Status or Completion Meeting
Medium (less than \$500k)	Grant Approval													Final Report		

**Optional Quarterly Reporting**  
Some grantees may be asked to provide quarterly reports in addition to a mid-year report. These reports may be accompanied with a quarterly status meeting. These requirements will be communicated in the grant agreement.

The cycle will repeat for multi-year grant.

# Update and Report Due Dates – Grants Approved in March

Pillar-Aligned

Mar

For all applicable updates and reports, Truist Foundation will send the form to grantees 30 days in advance of the due date. Forms should be submitted according to the below timelines.

Updates & Reports	Report Progress As Of:	Survey Due Date:
<b>Progress Report (Single-Year Grants)</b> Large	Nov 30	Dec 15
<b>Progress Report (Multi-Year Grants)</b> Large	May 31	Jun 15
<b>Final Report</b> Large Medium	Duration of grant	Grant value less than \$500k: Apr 30 Grant value \$500k and above: Jun 15

**Optional Quarterly Reporting**  
Some grantees may be asked to provide quarterly reports in addition to a mid-year report. This will be communicated in the grant agreement.

# Reporting Cadence – Grants Approved in June

Pillar-Aligned

June

The table below indicates the timing for our monitoring and reporting requirements. Truist Foundation will send invites and reminders for each event as needed. In most cases, the grant payment will occur within two months of grant approval, and the grant activities will start in month 3 or 4. This calendar displays the timeline for the grants approved in March.

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
	June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	March	Apr	May	Jun	July	Aug	September
Large (\$500k and above)	Grant Approval	Grant Kick-Off Meeting								Progress Report (Single Year Grants)						Final Report
										Status Meeting						Progress Report (Multi-Year Grants)
																Status or Completion Meeting
Medium (less than \$500k)	Grant Approval													Final Report		

**Optional Quarterly Reporting**  
Some grantees may be asked to provide quarterly reports in addition to a mid-year report. These reports may be accompanied with a quarterly status meeting. These requirements will be communicated in the grant agreement.

The cycle will repeat for multi-year grants

# Update and Report Due Dates – Grants Approved in June

Pillar-Aligned

June

For all applicable updates and reports, Truist Foundation will send the form to grantees 30 days in advance of the due date. Forms should be submitted according to the below timelines.

Updates & Reports	Report Progress As Of:	Survey Due Date:
<b>Progress Report (Single-Year Grants)</b> Large	Feb 28	Mar 15
<b>Progress Report (Multi-Year Grants)</b> Large	Aug 31	Sep 15
<b>Final Report</b> Large Medium	Duration of grant	Grant value less than \$500k: Jul 31 Grant value \$500k and above: Sep 15

## Optional Quarterly Reporting

Some grantees may be asked to provide quarterly reports in addition to a mid-year report. This will be communicated in the grant agreement.



# Reporting Cadence – Grants Approved in October

The table below indicates the timing for our monitoring and reporting requirements. Truist Foundation will send invites and reminders for each event as needed. In most cases, the grant payment will occur within two months of grant approval, and the grant activities will start in month 3 or 4. This calendar displays the timeline for the grants approved in March.

	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
	October	November	Dec	Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep	Oct	November	Dec	January
Large (\$500k and above)	Grant Approval	Grant Kick-Off Meeting								Progress Report (Single Year Grants)						Final Report
										Status Meeting						Progress Report (Multi-Year Grants)
																Status or Completion Meeting
Medium (less than \$500k)	Grant Approval													Final Report		

**Optional Quarterly Reporting**  
Some grantees may be asked to provide quarterly reports in addition to a mid-year report. These reports may be accompanied with a quarterly status meeting. These requirements will be communicated in the grant agreement.

The cycle will repeat for multi-year grants

# Update and Report Due Dates – Grants Approved in October

For all applicable updates and reports, Truist Foundation will send the form to grantees 30 days in advance of the due date. Forms should be submitted according to the below timelines.

Updates & Reports	Report Progress As Of:	Survey Due Date:
<b>Progress Report (Single-Year Grants)</b> Large	Jun 30	Jul 15
<b>Progress Report (Multi-Year Grants)</b> Large	Dec 31	Jan 15
<b>Final Report</b> Large      Medium	Duration of grant	Grant value less than \$500k: Nov 30 Grant value \$500k and above: Jan 15

**Optional Quarterly Reporting**  
Some grantees may be asked to provide quarterly reports in addition to a mid-year report. This will be communicated in the grant agreement.

# Grant Updates and Report Form Details

The following section shares the question topics that will be asked in the quarterly update, progress updates, and final report.

Form guides will also be shared with you that detail the exact questions asked in the forms with supporting guidance.



# Large Grantees Only: Progress Report – Project Progress Section (Mid-Year and/or Annual)

Pillar-Aligned

Mar  
Jun  
Oct

The forms will be provided in the Truist Foundation Grant Submission Portal one month before the due date and will request the following information:

- Major accomplishments and key grant-funded activities completed within the reporting period.
- Upcoming major activities or milestones in the next three to six months.
- Progress towards grant goals. Explain if and why goals will not be met and if any corrective actions are planned.
- Program risks you have experienced within the reporting period or anticipate in the future.
- Lessons learned through the implementation of this program.
- Any support requested from the Truist Foundation or opportunities for collaboration in the next three to six months, including sharing program success on social media or participating in key program events or any volunteer opportunities.
- A breakdown of the budget vs actual spend by category for the grant and compare spending progress to plan.
- Indicator Section (see slide 18)

\*If applicable, the update will be discussed during the Mid-Year/Annual meetings at which time grantees will have the opportunity to ask Truist Foundation questions and expand on report narratives as needed.



# For Medium and Large Grantees: Final Report

Pillar-Aligned

Mar

Jun

Oct


The forms will be provided in the Truist Foundation Grant Submission Portal one month before the due date and will request the following information:

- Impact the program had on the intended beneficiaries.
- *[Only for grants \$500k and above]* Key grant-funded activities and milestones completed within this grant period.
- Lessons learned through the implementation of this program.
- Progress toward grant goals.
- Any changes from the original program budget proposed in the application.
- Percent breakdown of the grant funds spending across the following categories: Training / Technical Assistance / Support Services or Educational Programming, Program Operating Funds / Administration, Administrative Fees, Loans, Grants, Other.
- Percentage of the program budget this grant funded.
- Indicator Section (See slide 18)

# Indicator Section of Progress Report and Final Report

Both progress reports (mid-year/annual – for large grantees only) and final reports (for medium and large grantees) include a section on indicator reporting. This section of the reports will request the following information:

- Number of individuals who have participated in grant-funded programming
- If populations served were in predominantly rural or urban areas
- Results for required and optional pillar-aligned output and outcome indicators based on grant activity and grant size. (See indicator list on slides 22-26)
- Additional grantee-proposed indicators and results to provide a comprehensive picture of the impact of the program.
- Organizational capacity building indicators. (See slide 27)
- *[Only for grants \$500k and above]* Explain indicator data collection process.
- *[Only for grants \$500k and above]* Identify data quality concerns or challenges.
- *[Only for grants \$500k and above]* Please share stories of impact or case studies highlighting the programs positive impacts for beneficiaries.



# Indicators for Measuring Grant Outcomes and Outputs

There are three types of grant indicators that Truist Foundation will collect from grantees.

- 1 | **Required** standard grant portfolio indicators
- 2 | **Optional** standard grant portfolio indicators
- 3 | **Grantee-proposed** unique program indicators

The form template will be shared via report link and will request the following information:

1. Truist Foundation required indicators are customized based on strategic pillar alignment, program activity, and total grant amount. The following slides indicate the required grant indicators based on the strategic pillar and activities associated with the grant. We understand that not all portfolio-level indicators will be applicable to your program activities.
2. Truist Foundation optional indicators are grouped by strategic pillar, program activity, and total grant amount. These are optional indicators that Truist Foundation desires to collect if it is not overly burdensome on grantees.
3. We understand that the portfolio-level indicators might not adequately capture the unique activities and impact of your program. Therefore, we ask grantees to propose additional indicators that measure the impact, outcome, and effectiveness of the program the grant supports if helpful. These program indicators may be tailored to the unique activities and goals associated with the grant and the program it supports. Please limit to five or fewer.



# How to Determine Applicable Grant Indicators for Your Grant

Pillar-Aligned

Mar

Jun

Oct

## 1. Identify the Truist Foundation pillar category most closely associated with your grant.

	Small Businesses Pillar	Career Pathways Pillar	Non-Pillar Aligned
	Grants that directly support small businesses	Grants that directly support workers and unemployed adults	Grants that are not aligned with either of Truist Foundation’s pillars
Outcome indicators	Report on all <b>outcome</b> indicators required based on total grant amount. Report on optional outcome indicators if data is available.	Report on all <b>outcome</b> indicators required based on total grant amount. Report on optional outcome indicators if data is available.	No outcome indicators are required.

## 2. Identify the program activities that will be conducted with the grant funding.

	Small Businesses Pillar	Career Pathways Pillar	Non-Pillar Aligned
	Technical assistance      Loans Grantmaking	Support services and training	All activities
Output indicators	Report on all <b>output</b> indicators required based on total grant amount. Report on optional outcome indicators if data is available.	Report on all <b>output</b> indicators required based on total grant amount. Report on optional outcome indicators if data is available.	Report on # of individuals who participated in the programming funded by this grant. No other output indicators are required to be reported.

## 3. Provide up to five unique outcome or output indicators that quantify the meaningful impact of the grant that you think will be of interest to Truist Foundation.

# Small Businesses Pillar Indicators – Portfolio-level Outcome Indicators

Pillar-Aligned

Mar

Jun

Oct

The following outcome indicators are required or optional **based on total grant amount**, for all Small Businesses pillar grants regardless of program activity. Truist Foundation will provide a report link for grantees to input these indicators as needed.

Outcome indicators	\$500K and above	Less than \$500K
Amount (\$) of additional resources mobilized during the grant period (including additional program funds raised, government funding, private capital, etc.)	Required	Required
# of jobs created by location (state-level)	Required	Required
# of jobs preserved or maintained by location (state-level)	Required	Required
% change in financial well-being for beneficiaries within 12 months of receiving support (pre-post intervention) (Based on CFPB financial well-being score or equiv.)	Optional	Optional
% change in revenue for small businesses 12 months of receiving support (pre-/post-intervention)	Optional	Optional

# Small Businesses Pillar Indicators – Portfolio-level Output Indicators

Pillar-Aligned

Mar  
Jun  
Oct

The following output indicators are required or optional **based on total grant amount**, for all Small Businesses pillar grants that provide direct technical assistance to small businesses. Truist Foundation will provide a report link for grantees to input these indicators as needed.

Output indicators for technical assistance program activities	\$500K and above	Less than \$500K
# of individuals who participated in the programming funded by this grant by location and LMI	Required	Required
# of small businesses supported by LMI status	Required	Required
Total hours of technical assistance/training/advisory services provided to small businesses	Required	Required
# of training sessions, workshops and/or events held	Required	Required
Was the training virtual, in-person, or hybrid	Required	Required
Length of the training provided in hours	Required	Required
# of participants for all training sessions, workshops and/or events	Required	Required
# of participants who enrolled in training programs	Required	Required
# of participants who completed training program	Required	Required
# of small businesses supported with revenue under \$1,000,000	Required	Required
Average Net Promoter Score (NPS) for the programs workshop/event/training sessions	Optional	Optional
# of people that completed the Net Promoter Score (NPS) survey	Optional	Optional
# of new training / technical assistance modules created	Optional	Optional

# Small Businesses Pillar Indicators – Portfolio-level Output Indicators

Pillar-Aligned

Mar

Jun

Oct

The following output indicators are required or optional **based on total grant amount**, for all Small Businesses pillar grants that provide loans or grants to small businesses. Truist Foundation will provide a report link for grantees to input these indicators as needed.

Output indicators for loan program activities*	\$500K and above	Less than \$500K
# of loans and total amount (\$) distributed with Truist grant funds, by LMI status	Required	Required
# of loans issued to first-time business borrowers	Required	Required

*\*Providing borrower LMI information will be optional for all loan program activity indicators.*

Output indicators for grant program activities	\$500K and above	Less than \$500K
# of grants and total amount (\$) distributed with Truist grant funds	Required	Required



# Career Pathways Pillar Indicators – Portfolio-level Outcome Indicators

Pillar-Aligned

Mar

Jun

Oct

The following outcome indicators are required or optional **based on total grant amount**, for all Career Pathways grants regardless of program activity. Truist Foundation will provide a report link for grantees to input these indicators as needed.

Outcome indicators	\$500K and above	Less than \$500K
# of workers placed into a job by location (state-level)	Required	Required
# of workers placed into a part-time job	Required	Required
# of workers placed into a full-time job	Required	Required
# of workers placed into a salaried job	Required	Required
# of workers placed into an hourly job	Required	Required
# of workers placed into a job that provides health insurance benefits	Required	Required
# of workers placed into a middle-skill or higher job	Required	Required
# of workers that were unemployed at the time of placement	Required	Required
# of workers/participants who advanced their career within 12 months of program completion (self-reported)	Required	Optional
# of participants who reported higher wages [hourly/monthly/yearly] within 12 months of program completion (self-reported)	Required	Optional
% change in financial well-being for beneficiaries within 12 mos. of receiving support (pre-post intervention) (Based on CFPB financial well-being score or equivalent)	Optional	Optional

# Career Pathways Pillar Indicators – Portfolio-level Output Indicators

Pillar-Aligned

Mar

Jun

Oct

The following output indicators are required or optional **based on total grant amount**, for all Career Pathways pillar grants that provide direct support services and training programs to workers. Truist Foundation will provide a report link for grantees to input these indicators as needed.

Output indicators for support services and training program activities	\$500K and above	Less than \$500K
# of individuals who participated in the programming funded by this grant by location and LMI	Required	Required
# of training sessions, workshops and/or events held	Required	Required
Was the training virtual, in-person, or hybrid	Required	Required
Length of the training provided in hours	Required	Required
# of participants for all training sessions, workshop and/or event	Required	Required
# of participants that enrolled in training programs	Required	Required
# of participants that completed training programs	Required	Required
Total hours of technical assistance / advisory services / training provided	Required	Required
# of workers who are receiving support services (childcare, transportation, housing, etc.)	Required	Required
Average Net Promoter Score (NPS) for the programs workshop/event/training sessions	Optional	Optional
# of people that completed the Net Promoter Score (NPS) survey	Optional	Optional
# of new training/technical assistance modules created	Optional	Optional

# Truist Foundation Capacity Building Indicators



In addition to collecting output and outcome indicators, we ask grantees to also report on organizational capacity-building indicators. We are interested in continuing to understand the impact of Truist Foundation funding on the organizations that they support, in addition to the potential impact on beneficiaries

Please answer to what extent the Truist Foundation support has helped you do the following:

*Answer choices of “not at all”, “very little”, “somewhat”, “significantly”*

- 1) We have been able to hire and/or retain qualified staff in all positions.
- 2) We have been able to provide on-the-job training and learning opportunities to enhance staff’s program-related skills.
- 3) We have increased capacity for fundraising and capital development.
- 4) We are better equipped to evaluate our impact and make more data-driven decisions.
- 5) We have been able to implement new or innovative programs and/or expand existing programs.

An open-ended question provides space for grantees to elaborate on the impact of Truist Foundation support on their organizational capacity and to share specific ways in which Foundation support has enabled the organization to build their capacity in these (or other) dimensions.

# Guidance for Non-Pillar-Aligned Grants

# Guide to this Section

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# Reporting Requirements and Cadence – Grants Approved in March

Grantees are required to complete a **Final Grant Report**. This report is a comprehensive report that discusses project accomplishments, impacts, stories, and lessons learned. The requirements for this report will be limited to essential elements with reduced free-form narrative inputs. Expected time to complete is about 2-6 hours depending on grant size and scope.

The table below indicates the timing for our monitoring and reporting requirements. Truist Foundation will send invites and reminders for each event as needed. In most cases, the grant payment will occur within two months of grant approval, and the grant activities will start in month 3 or 4. This calendar displays the timeline for the grants approved in March.

		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
		March	April	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	April	May	Jun
Non-Pillar-Aligned Grants	Grant Approval		Grant Agreement												Final Report		

For all applicable updates and reports, Truist Foundation will send the form to grantees 30 days in advance of the due date. Forms should be submitted according to the below timelines.

Updates & reports	Report progress as of:	Survey due date:
Final report	Duration of grant	Apr 30



# Reporting Requirements and Cadence – Grants Approved in June

Grantees are required to complete a **Final Grant Report**. This report is a comprehensive report that discusses project accomplishments, impacts, stories, and lessons learned. The requirements for this report will be limited to essential elements with reduced free-form narrative inputs. Expected time to complete is about 2-6 hours depending on grant size and scope.

The table below indicates the timing for our monitoring and reporting requirements. Truist Foundation will send invites and reminders for each event as needed. In most cases, the grant payment will occur within two months of grant approval, and the grant activities will start in month 3 or 4. This calendar displays the timeline for the grants approved in March.

		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
		June	July	Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	July	Aug	Sep
Non-Pillar-Aligned Grants	Grant Approval		Grant Agreement												Final Report		

For all applicable updates and reports, Truist Foundation will send the form to grantees 30 days in advance of the due date. Forms should be submitted according to the below timelines.

Updates & reports	Report progress as of:	Survey due date:
Final report	Duration of grant	July 31

# Reporting Requirements and Cadence – Grants Approved in October

Grantees are required to complete a **Final Grant Report**. This report is a comprehensive report that discusses project accomplishments, impacts, stories, and lessons learned. The requirements for this report will be limited to essential elements with reduced free-form narrative inputs. Expected time to complete is about 2-6 hours depending on grant size and scope.

The table below indicates the timing for our monitoring and reporting requirements. Truist Foundation will send invites and reminders for each event as needed. In most cases, the grant payment will occur within two months of grant approval, and the grant activities will start in month 3 or 4. This calendar displays the timeline for the grants approved in March.

		1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
		October	November	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	November	Dec	Jan
Non-Pillar-Aligned Grants	Grant Approval		Grant Agreement												Final Report		

For all applicable updates and reports, Truist Foundation will send the form to grantees 30 days in advance of the due date. Forms should be submitted according to the below timelines.

Updates & reports	Report progress as of:	Survey due date:
Final report	Duration of grant	Nov 30

# Grant Updates and Report Form Details

The following section shares the question topics that will be asked in the progress updates, indicator updates, and final report.


Form guides will also be shared with you that detail the exact questions asked in the forms with supporting guidance.



The forms will be provided in the Truist Foundation Grant Submission Portal at least one month before the due date and will request the following information:

- Number of individuals who have participated in grant-funded programming
- Impact the program had on the intended beneficiaries.
- Progress toward grant goals.
- Any changes from the original program budget proposed in the application.
- Percent breakdown of the grant funds spending across the following categories: Training / Technical Assistance / Support Services or Educational Programming, Program Operating Funds / Administration, Administrative Fees, Loans, Grants, Other.
- Percentage of the program budget this grant funded.





# Indicators for Measuring Grant Outcomes and Outputs

There are three types of grant indicators that Truist Foundation will collect from grantees.

- 1 | **Required** standard grant portfolio indicators
- 2 | **Optional** standard grant portfolio indicators
- 3 | **Grantee-proposed** unique program indicators

The form template will be shared via report link and will request the following information:

1. Truist Foundation required indicators are customized based on strategic pillar alignment, program activity, and total grant amount. The following slides indicate the required grant indicators based on the strategic pillar and activities associated with the grant. We understand that not all portfolio level indicators will be applicable to your program activities.
2. Truist Foundation optional indicators are grouped by strategic pillar, program activity, and total grant amount. These are optional indicators that Truist Foundation desires to collect if it is not overly burdensome on grantees.
3. We understand that the portfolio level indicators might not adequately capture the unique activities and impact of your program. Additionally, we are asking grantees to propose indicators that measure the impact, outcome, and effectiveness of the program the grant supports. These program indicators may be tailored to the unique activities and goals associated with the grant and the program it supports. Please limit to five or less.



# How to Determine Applicable Grant Indicators for Your Grant

Non-Pillar-  
Aligned

Mar  
Jun  
Oct


## 1. Identify the Truist Foundation pillar category most closely associated with your grant.

	Small Businesses Pillar	Career Pathways Pillar	Non-Pillar Aligned
	Grants that directly support small businesses	Grants that directly support workers and unemployed adults	Grants that are not aligned with either of Truist Foundation’s pillars
Outcome indicators	Report on all <b>outcome</b> indicators required based on total grant amount. Report on optional outcome indicators if the data is available.	Report on all <b>outcome</b> indicators required based on total grant amount. Report on optional outcome indicators if the data is available.	No outcome indicators are required.

## 2. Identify the program activities that will be conducted with the grant funding.

	Small Businesses Pillar	Career Pathways Pillar	Non-Pillar Aligned
	Technical assistance      Loans Grantmaking	Support services and training	All activities
Output indicators	Report on all <b>output</b> indicators required based on total grant amount. Report on optional outcome indicators if the data is available.	Report on all <b>output</b> indicators required based on total grant amount. Report on optional outcome indicators if the data is available.	Report on # of individuals who participated in the programming funded by this grant. No other output indicators are required to be reported.

## 3. Provide up to five unique outcome or output indicators that quantify the meaningful impact of the grant that you think will be of interest to Truist Foundation.



# **Appendix A: Spending Categories & Glossary of Terms**

# Guide to this Section

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# Truist Foundation Grant Spending Categories



In addition to collecting output and outcome indicators, grantees should also report actual grant spending by any of the major categories below that are relevant to the grant. It is expected that some grants will only have a single spending category.

- 1) Training, Technical Assistance, Support Services or Educational Programming
- 2) Program Operating Funds / Administration
- 3) Administrative Fees (e.g., fiscal sponsorship fees)
- 4) Loans
- 5) Grants
- 6) Other



# Glossary

- **Low-to-Moderate Income (LMI) Beneficiary:** A household that make less than 80% of the area median income.
- **Technical Assistance:** A capacity-building effort with a beneficiary or organization to provide direct assistance that is tailored to their unique needs.
- **Middle-Skill Job:** A job that requires a minimum of a high school diploma but does not require a 4-year college degree.
- **Milestone:** A discrete event or activity that indicates progress towards program objectives.
- **Net Promoter Score:** Single question metric [On a scale of 0-to-10, how likely is it that you would recommend [organization, product, or service] to a friend or colleague?] with a response scale rated from 0 (not likely) to 10 (extremely likely). Calculate the score by subtracting the percentage of detractors (response score of 0 to 6) from the percentage of promoters (response score of 9 to 10) [*total % of promoters – total % of detractors = net promoter score*].
- **Percent Change in Beneficiary Wages:** Calculated by taking the total pre-intervention wages for all beneficiaries and total post-intervention wages and calculating the net change for all beneficiaries that report wage data.
- **CFPB Financial Well-being:** A survey-based index to measure an individual's financial well-being developed by the Consumer Financial Protection Board. Additional guidance on data collection and calculation are available at [www.consumerfinance.gov/data-research/research-reports/financial-well-being-scale/](http://www.consumerfinance.gov/data-research/research-reports/financial-well-being-scale/)
- **Percent Change in Beneficiary Financial Well-being:** Calculated by taking the total pre-intervention and post-intervention CFPB scores and calculating the net change for all beneficiaries that report CFPB data.

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# THANK YOU



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