

The
UPS Foundation



The UPS Foundation Partner Guidebook

March 2024



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A letter from Nikki Clifton

President, Social Impact and
The UPS Foundation

The UPS Foundation is rooted in our commitment to delivering what matters to create a more sustainable, equitable, and just world for all.

In 2022, UPS employees and The UPS Foundation gave over \$65 million to communities across the globe, delivering hope and helping people in need. And with a bold goal to positively impact one billion lives by 2040, we are focusing our philanthropic approach on four key areas of health and humanitarian relief, equity and economic empowerment, local community engagement, and planet protection. Through these areas of focus, UPS Foundation will invest in strengthening our global communities and using our resources for good.

To UPS, that means more than writing a check. It means combining our employees' skills, passion, and time with the company's logistics expertise, transportation assets, and charitable donations to make a measurable difference in society. It means partnering with organizations like yours to develop innovative social impact programs that open doors for communities around the world. While there's still work to be done, we are proud to join in your commitment to delivering what matters.

Together, we're delivering pathways to empower resilient and safe communities. We are addressing challenges and moving toward a more just society. We are putting equity at the center and breaking down barriers to education and economic empowerment in underserved communities.

This guidebook lays out the basics of reporting for The UPS Foundation partners. You will find reporting requirements, questions, indicators, and schedules in it. We hope this provides clarity on what we will ask of you during your TUPSF-supported project. As always, we are available if you have any questions.

Thank you,

Nicole "Nikki" Clifton

President, Social Impact and The UPS Foundation

The requirements detailed in this guidebook feed into The UPS Foundation's broader measurement, evaluation, and learning (MEL) strategy.

MEL is essential to helping The UPS Foundation become a world-class foundation, informing its strategic decisions through evidence and data and communicating its story of impact to the world.

The UPS Foundation defines MEL as follows:

- M** **Measurement** - Measurement focuses on collecting data, information, and reports about grantee activities to understand *what was done*. Measurement is continuous throughout a program/project life cycle, and serves a dual purpose of compliance and informing learning.
- E** **Evaluation** - Evaluation shifts the focus from activities to measures of outcome-based impact to determine *what worked* and *to what extent*. Deep-dive evaluations on a subset of projects allow you to examine specific strategies or factors that may have led to success or failure in reaching project goals/targets.
- L** **Learning** - Learning focuses on *what we should do* to increase impact, including adopting best practices and applying evidence-based decisions. Learning requires using data and findings to inform rich discussion, guide future strategy and decision-making, and understand collective impact.

Simplify and Clarify Reporting Requirements



When done well, MEL can be a tool for strengthening learning and collaboration between you and The UPS Foundation rather than just a compliance mechanism.

By standardizing data collection and reporting processes, our goal is to make it easier for TUSPF staff to support you and utilize the data and stories you share.

Communicate Story of Impact



The UPS Foundation and its partners do important, meaningful work. Demonstrating both the direct results of this work and its ripple effects is critical.

Seeking both quantitative and qualitative data allows you as a partner to showcase the unique and nuanced ways in which you create impact.

Inform Grantmaking Structure and Strategy



MEL informs a positive feedback loop, helping to drive strategic decisions.

The MEL system is designed to allow you as a partner to provide feedback and insights on what is and isn't working in terms of your partnerships with TUSPF.

Measure Impact More Comprehensively



Being able to conduct analysis and draw insights from data collected allows TUSPF to gain a full picture of partnerships at the portfolio level.

In addition, strategically utilizing qualitative data and data on demographics and location allows you to demonstrate the depth and breadth of your work, and your alignment with stated goals around equity and justice.

Increase Impact



Ultimately, TUSPF exists to serve people around the world and create broader systems change.

The MEL system is designed to collect and provide insights into best practices that can help you drive greater impact in the world.

MEL Values

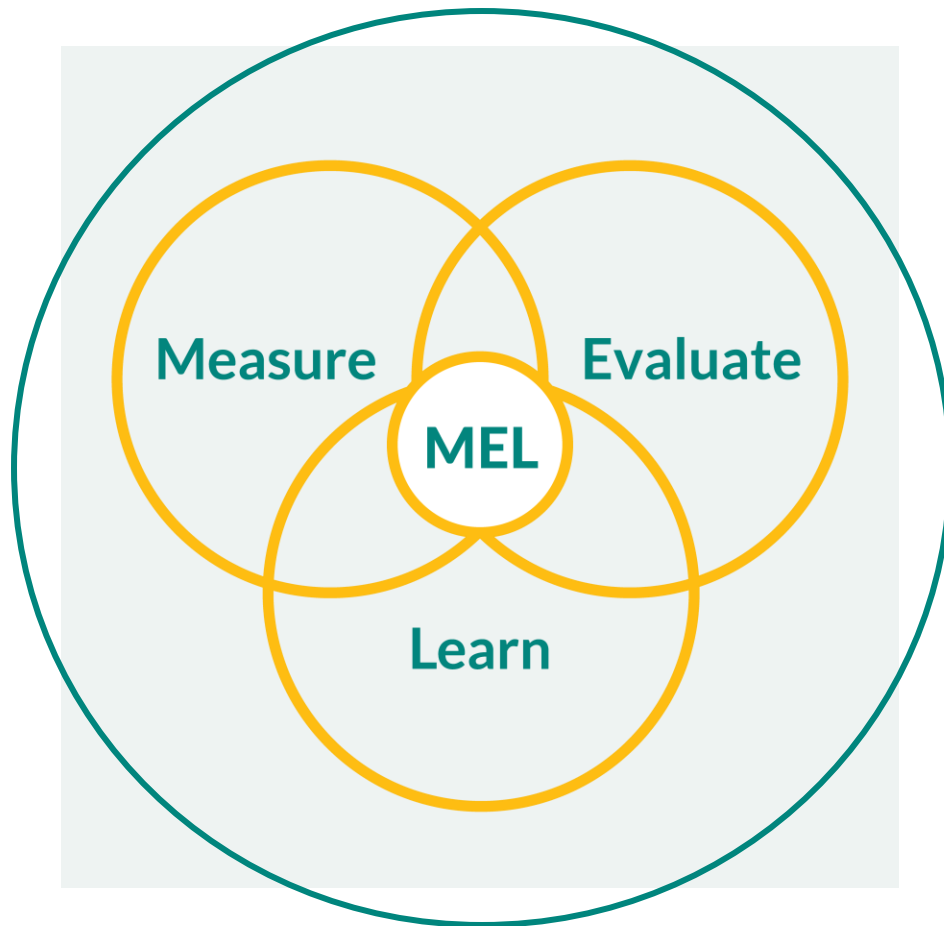
Cost and time effective - Measurement and reporting requirements are targeted and efficient, limiting the burden on both partners and staff.

Impact- and outcome-focused - Data collected goes beyond so-called vanity metrics to understand the results of work supported.

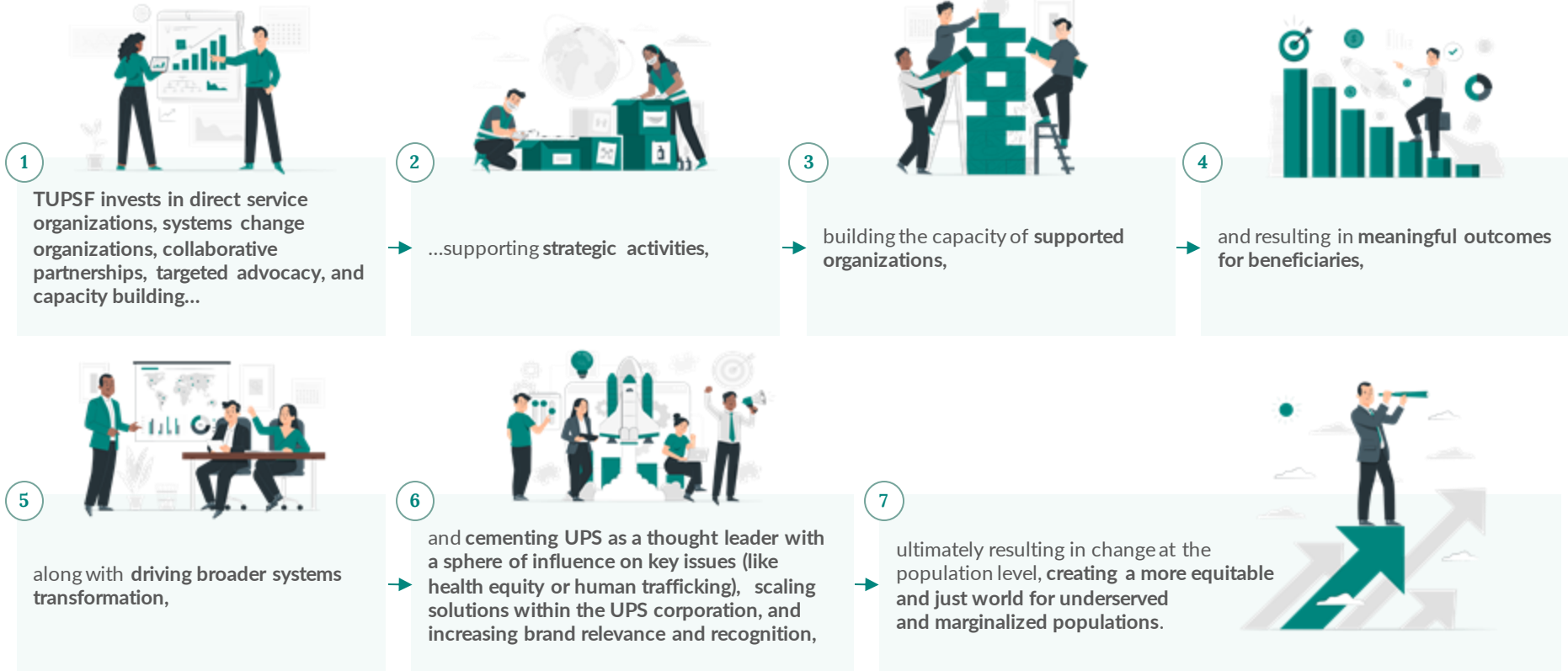
Right-sized - The value of data collected must exceed the cost to collect it. Measurement and reporting requirements are appropriate to the amount of support provided.

Learning-centered - Data collection and reporting requirements are driven by a desire to learn, expand the knowledge base, and inform strategic decision-making. This requires transparency on behalf of the Foundation and partners.

Equitable and just - MEL requirements are grounded in respect and sensitivity for the individuals, communities, and organizations participating in TUPSF-supported programming, and seek to measure equity-focused indicators in ways that are collaborative and non-extractive.



The UPS Foundation Story of Impact



The UPS Foundation Partnership Launch and Relationship Growth Guidance

The UPS Foundation requests partners co-create the following partnership communications plans with your grant leads to tell the story of our partnership.

Partnership Launch Plan

Design a comms strategy for the launch of our relationship.

- How should we design an announcement? (i.e. announce the relationship including what our funding will do)
- Who are the relevant stakeholders and audience? (i.e. internal and external)
- What leadership needs to be involved and how? (i.e. quotes, speaking events)
- What platforms should be used? (i.e. LinkedIn, website, newsletters, Instagram video)
- What approvals are required? (i.e. public affairs)
- What timing considerations and risks should be accounted for? (i.e. political environment, days of recognition)

Relationship Growth Plan

Design a comms strategy for key moments throughout our relationship.

- What are the key moments in the partnership that should be highlighted? (i.e. events, trainings, outcomes/results)
- How should these opportunities be leveraged? (i.e. lunch and learn, interviews)
- Who are the relevant stakeholders and audience? (i.e. internal and external)
- What leadership needs to be involved and how? (i.e. quotes, speaking events)
- What platforms should be used? (i.e. LinkedIn, website, newsletters, Instagram video)
- What approvals are required? (i.e. public affairs)
- What timing considerations and risks should be accounted for? (i.e. political environment, days of recognition)

The UPS Foundation Strategic Pillars

The UPS Foundation's HELP strategic pillars are designed with the intention of moving the needle in systems change work and positively impacting marginalized communities populated by underserved and underrepresented people.

The four focus areas of this strategy are:

- H** **Health and Humanitarian Relief** - Improves the well-being of people and communities by leveraging our partnerships and innovative logistical expertise to deliver health and humanitarian solutions for underserved and impacted communities.
- E** **Equity and Economic Empowerment** - Invests in organizations that address systemic education and economic barriers and create opportunities for underserved and underrepresented women, youth, and marginalized communities.
- L** **Local Community Engagement** - Leverages human capital to inspire and mobilize volunteers and organizations to deliver systemic impact to their local communities.
- P** **Planet Protection** - Advances environmental justice and a sustainable world.

The UPS Foundation Partnership Types

The UPS Foundation provides partner support through a variety of mechanisms. These mechanisms are described below. Measurement and reporting requirements are right-sized for each partnership category.

Note that your organization may receive multiple forms of support from TUPSF; reporting should be combined only for those forms of support aligned with a particular initiative or focus area. If a separate proposal was completed, you should submit separate reports.

Partnership Type	Description
Grant for systems change	Partners that received grants to fund systems change work.
Grant for direct programming	Partners that receive grant funds for direct program support.
In-kind logistics and delivery support	Partners that receive a grant in the form of UPS logistics support.
In-kind on loan executives	Partners that receive a UPS executive on loan to their organization for a discrete period of time.
Grant for scholarship distribution	Partners that receive a grant to fund scholarships.
Volunteerism	Organizations that partner with TUPSF on employee volunteer initiatives or have UPS employee and their friend and family volunteer with them.
Sponsorships	TUPSF sponsorships that support discrete time-bound events, such as conferences, workshops, etc.
Endowments for scholarship distribution	TUPSF endowments that support scholarships.
Endowments for other purposes than scholarships	TUPSF endowments that do not support scholarships.

The UPS Foundation Priority Markets

While The UPS Foundation supports work throughout the world, select U.S.-based cities and non-U.S. countries have been identified as priority markets. If your The UPS Foundation-supported work takes place in *any* priority markets, you will be asked to complete MEL reporting requirements applicable to priority market partnerships. If your work occurs in multiple locations and any of these locations are a UPS Foundation priority market, you will be asked to follow the priority market requirements outlined in this guidebook.



If you are unsure if your work takes place in a priority market, reach out to your TUPSF Point of Contact to check.

Program Activities Supported by The UPS Foundation

The UPS Foundation supports an array of activities. The following is a list of the program activities supported by The UPS Foundation, though it is not comprehensive. Your TUPSF-supported project may include one or more of these activities.

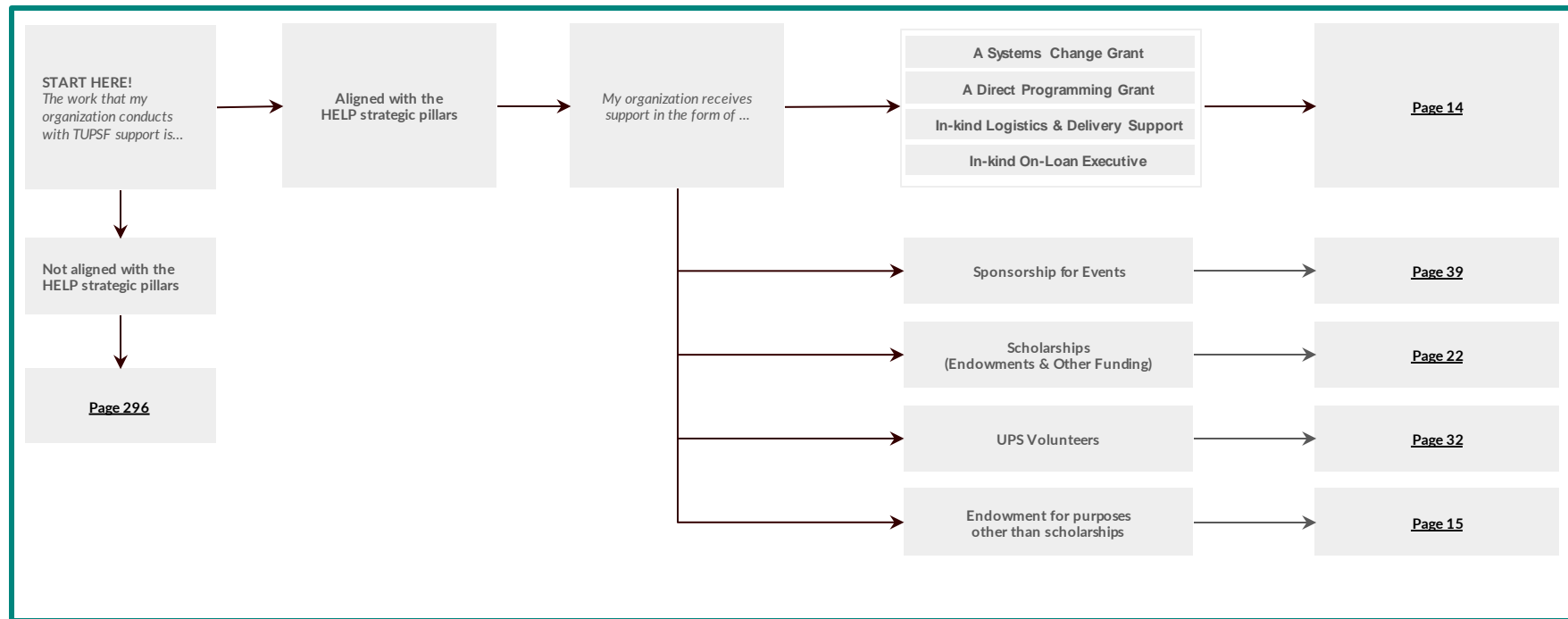
Program Activities	Description
Disaster Preparedness	Activities dedicated to helping individuals, organizations, and communities prepare for either natural (e.g. tornadoes, hurricanes) or manmade (e.g. war) disasters.
Disaster Response	Activities dedicated to helping individuals, organizations, and communities recover from either natural (e.g. tornadoes, hurricanes) or manmade (e.g. war) disasters.
Disaster Preparedness and Response - Training Activities	Training activities that help individuals, organizations, and communities prepare for/ recover from either natural or manmade disasters.
Anti-Trafficking Training	Training activities that help individuals better understand how to identify and address human trafficking.
Services to Survivors of Trafficking	Direct services provided to survivors of human trafficking (such as job training, counseling, housing, etc.).
Research and innovation	Primary research activities, experimentation, and development and testing of new solutions.
Workforce and Leadership Development	Training activities and mentorship provided to people (e.g. workforce readiness training).
SME/SMB Support	Training activities and/or microloans, small business loans, and seed funding provided to entrepreneurs.
Education	Educational initiatives for youth aged 14-24 including efforts to break systemic educational barriers and create pathways for youth.
Scholarships	Funding for higher education at either two- or four-year institutions.
Advocacy	Funding for advocacy for selected issues
Volunteerism	Direct involvement of UPS employees and their families or friends in providing services or taking action.
Tree Planting Training Activities	Training activities provided in relation to environmental conservation and restoration efforts (e.g. tree planting).
Employment Related to Tree Planting	The creation of jobs and hiring of individuals to support tree planting initiatives.
Organizational Capacity Building	Efforts to strengthen/improve internal organizational capacity related to staffing, growth, and programming.
Systems Change	Work focused on changing the ways in which systems function, including a focus on: policy reform/passage; strengthening/increasing the quality and number of relationships among actors; shifting resource flows; engaging actors historically underrepresented and/or underserved; adopting activities and practices focused on improving social and environmental conditions; and shifting attitudes/mindsets.

Guidebook Navigator

Use this handy flowchart to determine where you need to reference in the Guidebook. If your organization receives multiple forms of support from TUPSF for a *single* initiative or focus area, you should visit each of the appropriate sections to understand reporting requirements. However, required reports (e.g. completion reports) will be combined. If you receive support for multiple initiatives, please report on each separately.

HINT

Viewing this as a PDF?
Clicking on the page numbers
will navigate to that page.

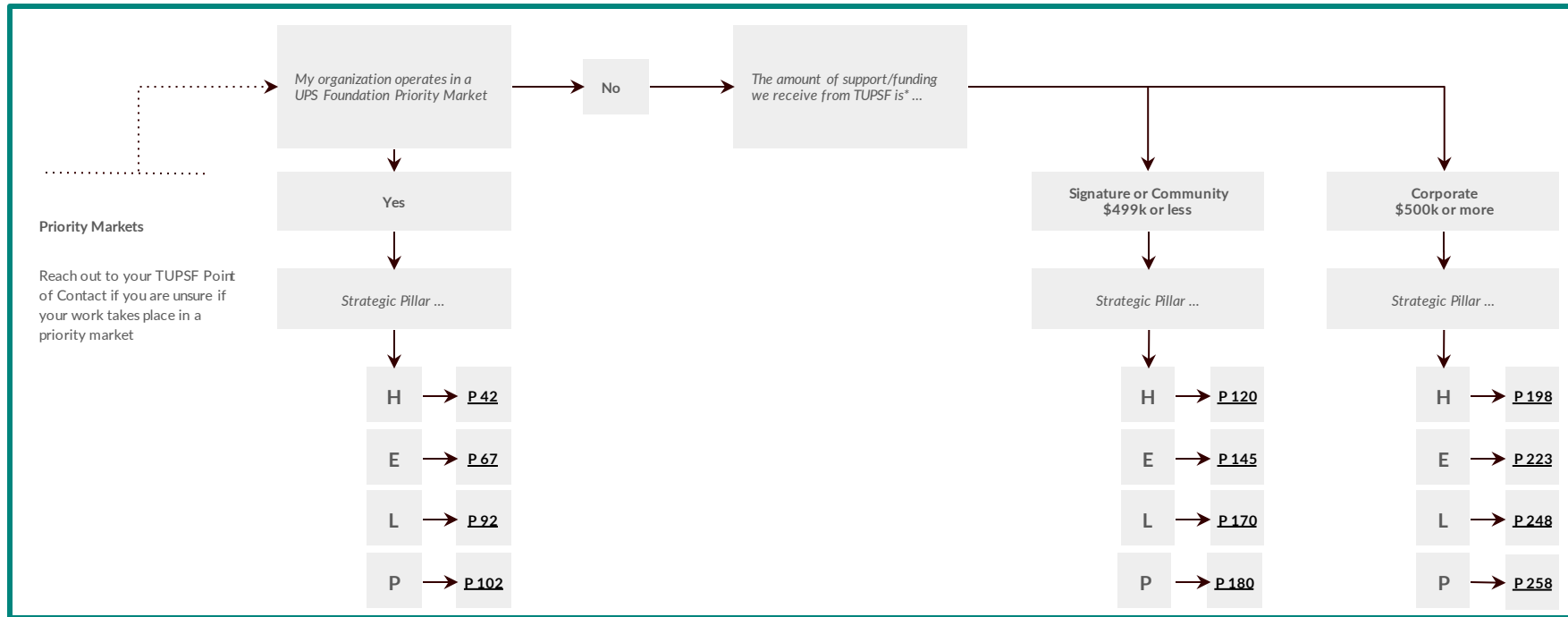


Guidebook Navigator

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HINT

Viewing this as a PDF?
Clicking on the page numbers
will navigate to that page.



*For In-kind Logistics & Delivery support please base on the commercial value of the in-kind support received. If you receive multiple forms of support for a single initiative, please consider the cumulative value of that support.

Endowments for Purposes Other than Scholarships

Measurement and Reporting Requirements

Meetings



There are no required MEL meetings for organizations receiving The UPS Foundation endowments.

Reports



Annual

Partnership Status and Indicator Update

Concise update (via survey link) on key activities completed, progress against each of the goals, spending (budget vs. actual), lessons learned, risks/challenges, and key accomplishments.

Partnership Status and Indicator Update Form Details

Organizations receiving endowments from The UPS Foundation are required to submit a partnership status and indicator update form on an annual basis. The form template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

The UPS Foundation requires reporting on specific output- and outcome-level indicators to enable aggregation at the portfolio level. However, The UPS Foundation also values the unique impact of each partner so includes room for partners to share any additional indicators that help to communicate their impact.

The form will request the following information:

Geographic location of the work supported by the endowment

Impact of The UPS Foundation support on intended beneficiaries

The UPS Foundation-required output- and outcome-level indicators

Specific stories of impact (individual- and/or community-level) highlighting the program's positive impacts for beneficiaries

Details on funding utilization/budget

Feedback on TUPSF support

Endowments Indicators - Output Indicators

The following output indicators are required or optional for all endowments for purposes other than scholarships. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for non-scholarship endowments	Required v. Optional
Total # lives impacted, by location, low-to-moderate income, disability, and demographics	Required
Market value of endowment as of the current year	Required
Income received on endowment in last fiscal year	Required
Expenditure for program(s) supported by the endowment in the last fiscal year	Required
Unit cost/ average dollar cost of delivering a single unit of your service to an individual (\$USD)	Optional

Indicator Guidance: Lives Impacted

All partners of The UPS Foundation are asked to report on the indicator "total # lives impacted," which contributes to our goal of positively impacting one billion lives by 2040. We ask that partners report on the lives directly impacted in the work supported by The UPS Foundation partnership. As a general rule, you should not report on the total number of individuals in an affected geographic region, individuals served/trained through non-UPS funding, or media visits/views. We highly encourage you to review your methodology to avoid double counting; for example, if you count both the number of individuals trained and the number of individuals placed into jobs, please de-duplicate these numbers before reporting on the total lives impacted.

Examples of figures that are considered valid or invalid for inclusion in your reporting based on The UPS Foundation Program Activities are included in the [Appendix](#) to this guidebook.

For additional guidance or to discuss your proposed methodology for calculating lives impacted, please reach out to your UPS point of contact.



If you have questions or concerns about your measurement and reporting requirements, please reach out directly to your UPS point of contact.

You have reached the end of this section of the guidebook. If you receive multiple forms of support from The UPS Foundation, please [return to the navigation page](#) to access the other section(s) of the guidebook relevant to your organization.



Scholarships (Endowments and Other Funding)

Measurement and Reporting Requirements

Meetings



Variable

MEL Kick-Off Meeting

Meeting (virtual) to finalize reporting requirements, required indicators, and formats and discuss any concerns or anticipated challenges.

Reports

Annual**



Partnership Status and Indicator Update

Concise update (via survey link) on key activities completed, progress against each of the goals, spending (budget vs. actual), lessons learned, risks/challenges, and key accomplishments.

Annual



GRI Indicator Report*

A very brief report on key indicators, such as lives impacted and number of trees planted.

Upon Completion



Completion Report

Comprehensive report (via survey link) that discusses project accomplishments, impacts, stories, lessons learned and progress for output, outcome, and systems indicators.

Variable



Post-Completion Follow-up

Submission (via survey link) seeking reporting on systems changes, outcomes, and output indicators one or more years post-completion (for large grantees) enables TUPSF to assess changes that may be longer term in nature.

*The GRI Indicator Report is only required for grantees receiving \$15,000+ in support from TUPSF.

**Annual reports will only be required if funds are provided for multiple years.

Partnership Status and Indicator Update Form Details

Scholarship organizations with multi-year funding are required to submit a partnership status and indicator update form on an annual basis. The form template will be shared via survey link in an email from The UPS Foundation at least one month before the due date. This report is not required for single-year funding cycles.

The UPS Foundation requires reporting on specific output- and outcome-level indicators to enable aggregation at the portfolio level. However, The UPS Foundation also values the unique impact of each partner so includes room for partners to share any additional indicators that help to communicate their impact.

The form will request the following information:

Geographic location of the scholarships distributed

Impact of The UPS Foundation support on intended beneficiaries

The UPS Foundation-required output- and outcome-level indicators

Specific stories of impact (individual- and/or community-level) highlighting the program's positive impacts for beneficiaries

Details on funding utilization/budget

Feedback on TUPSF support

Partners who receive funding of \$15,000 or more are required to submit a GRI Indicator Report on an annual basis. This very brief report focuses on a calendar year (January 1 - December 31) and is due mid-December. The form template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

The form will request the following information:

lives positively impacted

vaccines delivered in-kind to countries in need, by kind/type

disasters responded to by location

countries reached by location

trees planted by location

female and small business owners connected to the global economy/acquired job readiness skills (in general and through UPS's Women Exporters Program)

young adults provided equitable access to academic support for college/career enrichment opportunities

exponential lives positively impacted (systems change work only)

Completion Report Form Details

The completion form submission is required once at the end of the funding cycle. The template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

The UPS Foundation requires reporting on specific output- and outcome-level indicators to enable aggregation at the portfolio level. However, The UPS Foundation also values the unique impact of each partner so includes room for partners to share any additional indicators that help to communicate their impact.

The form will request the following information:

Impact of The UPS Foundation support on intended beneficiaries

The UPS Foundation-required output- and outcome-level indicators

Specific stories of impact (individual- and/or community-level) highlighting the program's positive impacts for beneficiaries

Feedback on TUPSF support

Scholarships (Endowments and Other Funding) - Output Indicators

The following output indicators are required or optional for all partners (including endowments) who provide scholarships. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Scholarship activities	Required v. Optional
# of individuals provided scholarships by demographics, low-to-moderate income, disability, 1st generation college students, and institution type (2- and 4-year, or credentialing institutions)	Required
# scholarship recipients in good standing at their educational institution	Optional
# scholarships that were provided for historically Black colleges and universities (HBCUs)	Optional
# of scholarship recipients by major	Optional
Unit cost/ average dollar cost of delivering a single unit of your service to an individual (\$USD)	Optional

Indicator Guidance: Lives Impacted

All partners of The UPS Foundation are asked to report on the indicator "total # lives impacted," which contributes to our goal of positively impacting one billion lives by 2040. We ask that partners report on the lives directly impacted in the work supported by The UPS Foundation partnership. As a general rule, you should not report on the total number of individuals in an affected geographic region, individuals served/trained through non-UPS funding, or media visits/views. We highly encourage you to review your methodology to avoid double counting; for example, if you count both the number of individuals trained and the number of individuals placed into jobs, please de-duplicate these numbers before reporting on the total lives impacted.

Examples of figures that are considered valid or invalid for inclusion in your reporting based on The UPS Foundation Program Activities are included in the [Appendix](#) to this guidebook.

For additional guidance or to discuss your proposed methodology for calculating lives impacted, please reach out to your UPS point of contact.

Scholarships (Endowments and Other Funding) - Outcome Indicators

The following outcome indicators are required or optional for all partners (including endowments) who provide scholarships. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Scholarship activities	Required v. Optional
# of scholarship recipients who graduated by demographics, low-to-moderate income, 1st generation college students, and institution type (2- and 4-year, or credentialing institutions)	Required
# of supported youth who transitioned to employment or further education	Required
# of scholarship recipients who had a job 6 months post-graduation, by demographics	Optional
% change in career readiness scores (as measured by the Career Resources Questionnaire)	Optional



If you have questions or concerns about your measurement and reporting requirements, please reach out directly to your UPS point of contact.

You have reached the end of this section of the guidebook. If you receive multiple forms of support from The UPS Foundation, please [return to the navigation page](#) to access the other section(s) of the guidebook relevant to your organization.



UPS Volunteers

Measurement and Reporting Requirements

Meetings



There are no required MEL meetings for organizations receiving The UPS Foundation volunteer support.

Reports



Post-Event

Completion Report

Comprehensive report (via survey link) that discusses project accomplishments, impacts, stories, lessons learned, and progress for output and outcome indicators.

Completion Report Form Details

The completion form submission is required once at the end of the funding cycle. The template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

The UPS Foundation requires reporting on specific output- and outcome-level indicators to enable aggregation at the portfolio level. However, The UPS Foundation also values the unique impact of each partner so includes room for partners to share any additional indicators that help to communicate their impact.

The form will request the following information:

Impact of The UPS Foundation support on intended beneficiaries

Key activities and milestones completed during the reporting period

The UPS Foundation-required output- and outcome-level indicators

Specific stories of impact (individual- and/or community-level) highlighting the program's positive impacts for beneficiaries

Feedback on TUPSF support

UPS Volunteer Partners - Output & Outcome Indicators

The following output and outcome indicators are required or optional for all partners who engage with UPS-sponsored volunteer events. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Volunteer Activities	Required v. Optional
# of UPS employee and friend/family volunteers	Required
Total # of lives impacted as a result of volunteer activities (e.g. individuals receiving meals, lawn care assistance, etc.)	Required
Location(s) of volunteer activities (country; state; city <u>and</u> whether location is considered underserved or predominantly Black)	Required
Media stories related to UPS volunteerism with your organization	Optional
Unit cost/ average dollar cost of delivering a single unit of your service to an individual (\$USD)	Optional
Outcome indicators for Volunteer Activities	Required v. Optional
Stories of impact from volunteer event (for individuals and/or communities)	Required
Satisfaction with volunteer support	Required
Open-ended: Briefly describe your experience with TUPSF volunteer support	Required

Indicator Guidance: Lives Impacted

All partners of The UPS Foundation are asked to report on the indicator "total # lives impacted," which contributes to our goal of positively impacting one billion lives by 2040. We ask that partners report on the lives directly impacted in the work supported by The UPS Foundation partnership. As a general rule, you should not report on the total number of individuals in an affected geographic region, individuals served/trained through non-UPS funding, or media visits/views. We highly encourage you to review your methodology to avoid double counting; for example, if you count both the number of individuals trained and the number of individuals placed into jobs, please de-duplicate these numbers before reporting on the total lives impacted.

Examples of figures that are considered valid or invalid for inclusion in your reporting based on The UPS Foundation Program Activities are included in the [Appendix](#) to this guidebook.

For additional guidance or to discuss your proposed methodology for calculating lives impacted, please reach out to your UPS point of contact.



If you have questions or concerns about your measurement and reporting requirements, please reach out directly to your UPS point of contact.

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Sponsorships

Measurement and Reporting Requirements

Meetings



There are no required MEL meetings for organizations receiving The UPS Foundation sponsorship.

Reports

Post-Event



Completion Report

Comprehensive report (via survey link) that discusses project accomplishments, impacts, stories, lessons learned and progress for output, outcome, and systems indicators.

Completion Report Form Details

The completion form submission is required once at the end of the funding cycle. The template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

The UPS Foundation requires reporting on specific output- and outcome-level indicators to enable aggregation at the portfolio level. However, The UPS Foundation also values the unique impact of each partner so includes room for partners to share any additional indicators that help to communicate their impact.

The form will request the following information:

Impact of The UPS Foundation support on intended beneficiaries

Key activities and milestones completed during the reporting period

The UPS Foundation-required output- and outcome-level indicators

Specific stories of impact (individual- and/or community-level) highlighting the program's positive impacts for beneficiaries

Feedback on TUPSF support

Sponsorship Indicators - Output Indicators

The following output indicators are required or optional for all partners who receive sponsorships for events. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for event sponsorships	Required v. Optional
Total # lives impacted, by location, low-to-moderate income, disability, and demographics	Required
Total # of participants	Required
Unit cost/ average dollar cost of delivering a single unit of your service to an individual (\$USD)	Optional

Indicator Guidance: Lives Impacted

All partners of The UPS Foundation are asked to report on the indicator "total # lives impacted," which contributes to our goal of positively impacting one billion lives by 2040. We ask that partners report on the lives directly impacted in the work supported by The UPS Foundation partnership. As a general rule, you should not report on the total number of individuals in an affected geographic region, individuals served/trained through non-UPS funding, or media visits/views. We highly encourage you to review your methodology to avoid double counting; for example, if you count both the number of individuals trained and the number of individuals placed into jobs, please de-duplicate these numbers before reporting on the total lives impacted.

Examples of figures that are considered valid or invalid for inclusion in your reporting based on The UPS Foundation Program Activities are included in the [Appendix](#) to this guidebook.

For additional guidance or to discuss your proposed methodology for calculating lives impacted, please reach out to your UPS point of contact.

Organizational Capacity Building Indicators

The following outcome indicators are required based on the program activities funded. We are interested in understanding the impact of The UPS Foundation funding/support on partner organizations, in addition to the potential impact on beneficiaries. For each indicator below you will be asked to indicate to what extent The UPS Foundation support you received has helped you, with response options “not at all,” “very little,” “somewhat,” and “significantly.” Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Organizational Capacity Building Indicators	Required v. Optional
Increased capacity for fundraising and capital development	Required
Ability to hire and/or retain qualified staff in all positions	Required
Ability to provide on-the-job training and learning opportunities to enhance staffs' program-related skills	Required
Ability to evaluate impact and make data-driven decisions	Required
Ability to implement new or innovative programs and/or expand existing programs	Required
Ability to incorporate principles related to equity and justice into program design or delivery	Required
Ability to create and test more innovative solutions or products	Required
Gained the knowledge or ability to carry out more technical or specialized work or to carry that work out more effectively.	Required



If you have questions or concerns about your Measurement and reporting requirements, please reach out directly to your UPS point of contact.

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Priority Market Support **(Grants, In-kind Logistics and Delivery, & On-Loan Executives)**

Health and Humanitarian Relief

Measurement and Reporting Requirements

Measurement & Reporting Requirement Descriptions

Meetings



At Start of Partnership

MEL Kick-Off Meeting

Meeting (virtual) to finalize reporting requirements, required indicators, and formats and discuss any concerns or anticipated challenges.



Bi-Annual

Partnership Status Meetings

This meeting (virtual) will be an opportunity to check in with The UPS Foundation team on progress, accomplishments, upcoming project activities, and challenges faced. No slides are required. The project status update form submission will be the basis for the discussion. Questions that arise mid-cycle from both sides will be saved for this meeting.



At End of Support Period

Completion Meeting

This meeting provides a final opportunity for TUPSF and partners to connect to discuss achievements, lessons learned, and best practices.

Reports



Annual (\$100K+ Bi-Annual)

Partnership Status and Indicator Update

Concise update (via survey link) on key activities completed, progress against each of the goals, lessons learned, risks/challenges, and key accomplishments.



Annual

GRI Indicator Report*

A very brief report on key indicators, such as lives impacted and number of trees planted.



At End of Support Period

Completion Report

Comprehensive report (via survey link) that discusses project accomplishments, impacts, stories, lessons learned and progress for output, outcome, and systems indicators.



Variable

Post-Completion Follow-up

Submission (via survey link) seeking reporting on systems changes, outcomes, and output indicators one or more years post-completion enables TUPSF to assess changes that may be longer term in nature.

Other



Variable

Third-Party Impact Evaluation

Third-party evaluations provide robust and objective insights into the processes and achievements of projects, including providing credible evidence of *what worked, by how much, and why.*

Partnership Status and Indicator Update Form Details

Partners are required to submit a partnership status and indicator update form on an annual basis and bi-annual if over \$100k. The form template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

The UPS Foundation requires reporting on specific output- and outcome-level indicators to enable aggregation at the portfolio level. However, The UPS Foundation also values the unique impact of each partner so includes room for partners to share any additional indicators that help to communicate their impact.

The form will request the following information:

Geographic location of TUPSF support provided

Major accomplishments, milestones, and activities during the support period

Activities and milestones anticipated in the next 3-6 months

Progress toward short-term goals

Program risks and lessons learned

Impact of The UPS Foundation support on organizational capacity

Impact of The UPS Foundation support on intended beneficiaries

The UPS Foundation-required output- and outcome-level indicators

Specific stories of impact (individual- and/or community-level) highlighting the program's positive impacts for beneficiaries

Details on funding utilization/budget

Feedback on TUPSF support

GRI Indicator Report

Partners who receive funding of \$15,000 or more are required to submit a GRI Indicator Report on an annual basis. This very brief report focuses on a calendar year (January 1 - December 31) and is due mid-December. The form template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

The form will request the following information:

lives positively impacted

vaccines delivered in-kind to countries in need, by kind/type

disasters responded to by location

countries reached by location

trees planted by location

female and small business owners connected to the global economy/acquired job readiness skills (in general and through UPS's Women Exporters Program)

young adults provided equitable access to academic support for college/career enrichment opportunities

exponential lives positively impacted (systems change work only)

Completion Report Form Details

The completion form submission is required once at the end of the funding cycle. The template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

The UPS Foundation requires reporting on specific output- and outcome-level indicators to enable aggregation at the portfolio level. However, The UPS Foundation also values the unique impact of each partner so includes room for partners to share any additional indicators that help to communicate their impact.

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Summary of impact of The UPS Foundation support on intended beneficiaries

Key activities and milestones completed during the reporting period
Progress toward goals of TUPSF support

Organizational capacity building indicators and stories of impact for the supported organization

The UPS Foundation-required output- and outcome-level indicators

Sustainable Development Goals supported

Lessons learned in terms of what worked well and what did not work as anticipated/what might you have done differently

Breakdown of spending by categories

Specific stories of impact (individual- and/or community-level) highlighting the program's positive impacts for beneficiaries

Feedback on TUPSF support

Health and Humanitarian Relief: All Partners - Output Indicators

The following output indicators are required or optional. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Health & Humanitarian Relief activities	Required v. Optional
Total # lives impacted by direct support or other organizations, by location, low-to-moderate income, disability, and demographics	Required
Country(ies), states, priority markets supported	Required
# deliveries completed	Required
# supplies delivered by supply type (food; vaccines (by type); medicine (by type); other)	Required
# of recovery shipments	Required
# vaccines and medicines delivered by ministries of health and other organizations due to the logistics or supply chain optimization UPS put in place (by type) (ex: ultra cold freezers)	Optional
Unit cost/ average dollar cost of delivering a single unit of your service to an individual (\$USD)	Optional

Indicator Guidance: Lives Impacted

All partners of The UPS Foundation are asked to report on the indicator "total # lives impacted," which contributes to our goal of positively impacting one billion lives by 2040. We ask that partners report on the lives directly impacted in the work supported by The UPS Foundation partnership. As a general rule, you should not report on the total number of individuals in an affected geographic region, individuals served/trained through non-UPS funding, or media visits/views. We highly encourage you to review your methodology to avoid double counting; for example, if you count both the number of individuals trained and the number of individuals placed into jobs, please de-duplicate these numbers before reporting on the total lives impacted.

Examples of figures that are considered valid or invalid for inclusion in your reporting based on The UPS Foundation Program Activities are included in the [Appendix](#) to this guidebook.

For additional guidance or to discuss your proposed methodology for calculating lives impacted, please reach out to your UPS point of contact.

Health and Humanitarian Relief: All Partner - Outcome Indicators

The following outcome indicators are required or optional. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Health & Humanitarian Relief activities	Required v. Optional
% change in hunger index score (pre/post program) (such as Fanta index, FIES)	Optional
% change in beneficiaries' well-being score (as measured by WHO-5 or similar)	Optional
% change in beneficiaries' self-rated health score	Optional
% change in beneficiaries' resilience score (as measured by the Brief Resilience Scale)	Optional

Health and Humanitarian Relief: Disaster Preparedness - Output Indicators

The following output indicators are required or optional for all Health and Humanitarian Relief partners who conduct work related to disaster preparedness. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Health & Humanitarian Relief activities	Required v. Optional
# of preparedness shipments or prepositioning	Required
# preparedness tools developed	Required
# preparedness tools accessed	Required

Health and Humanitarian Relief: Disaster Preparedness - Outcome Indicators

The following outcome indicators are required or optional for all Health and Humanitarian Relief partners who conduct work related to disaster preparedness. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a surveylink for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Health & Humanitarian Relief activities	Required v. Optional
Emergency preparedness plans in place or improved	Required
# agencies/organizations adopting collaborative/integrated protocols	Required
Results of third-party capacity assessments (e.g. OCHA)	Optional
% of agencies/organizations with activities/plans to address gender-based violence and trafficking	Optional
% of agencies/organizations with activities/plans to assist vulnerable migrants	Optional
% of agencies/organizations with rapid response teams organized, trained, and equipped with multi-hazard approach	Optional
# of individuals/ businesses/ communities that report they are prepared for disaster	Optional
# of individuals/ businesses/ communities that report they adopted disaster readiness practices	Optional

Health and Humanitarian Relief: Disaster Response - Output Indicators

The following output indicators are required or optional for all Health and Humanitarian Relief partners who conduct work related to disaster response. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Health & Humanitarian Relief activities	Required v. Optional
# crisis(es) supported	Required
# of disaster survivors receiving essential services	Required

Health and Humanitarian Relief: Disaster Response - Outcome Indicators

The following outcome indicators are required or optional for all Health and Humanitarian Relief partners who conduct work related to disaster response. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Health & Humanitarian Relief activities	Required v. Optional
Tell us about a business that reopened after a disaster with your support	Optional

Health and Humanitarian Relief: Disaster Preparedness and Response Training Activities - Output Indicators

The following output indicators are required or optional for all Health and Humanitarian Relief partners who conduct training activities related to disaster preparedness and response. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Health & Humanitarian Relief activities	Required v. Optional
# training sessions conducted	Required
Was this training virtual or in-person	Required
# of individuals received training	Required
Length of training provided (in hours)	Required
Training completion rate (%)	Required
Average Net Promoter Score for trainings	Optional

Health and Humanitarian Relief: Research & Innovation - Output & Outcome Indicators

The following output and outcome indicators are required or optional for all Health and Humanitarian Relief partners who do research/innovation. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Health and Humanitarian activities	Required v. Optional
Tell us about the innovation-focused work that TUPSF support enabled	Required
# points of access for better health outcomes that TUPSF support enabled	Required
Outcome indicators for Health and Humanitarian activities	Required v. Optional
# facilities/clinics providing immunization with functioning cold chain	Required
Description of the adoption or utilization of innovative solutions driven by TUPSF-supported work	Optional

Health and Humanitarian Relief: Anti-Trafficking Training - Output Indicators

The following output indicators are required or for all Health and Humanitarian Relief partners who conduct training activities related to anti-trafficking. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Health & Humanitarian Relief activities	Required v. Optional
# of individuals who received anti-trafficking training	Required
# of anti-trafficking sessions conducted	Required
Was the training virtual or in-person	Required
What is the length of training provided (in hours)	Required
Completion rate of the training for individuals (%)	Required
# of UPS drivers who received anti-trafficking training	Required

Health and Humanitarian Relief: Anti-Trafficking Training - Output Indicators Cont.

The following output indicators are required or for all Health and Humanitarian Relief partners who conduct training activities related to anti-trafficking. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Health & Humanitarian Relief activities	Required v. Optional
# of UPS drivers trained as anti-trafficking trainers	Required
# training sessions supported by UPS drivers and other drivers	Required
# individuals received training supported by UPS drivers	Required
# of individuals completed training due to UPS in-kind transportation.	Required
Average Net Promoter Score for anti-trafficking trainings	Optional

Health and Humanitarian Relief: Anti-Trafficking Training - Outcome Indicators

The following outcome indicators are required or optional for all Health and Humanitarian Relief partners who conduct training activities related to anti-trafficking. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Health & Humanitarian Relief activities	Required v. Optional
# of truckers who believe they are equipped to take action when they see suspected human trafficking (post-training survey)	Required
# of truckers who report that they have the situational awareness to identify human trafficking (post-training survey)	Required
# of truckers who understand the process for reporting suspected human trafficking (post-training survey)	Required
# of truckers that completed the post-training survey	Required

Health and Humanitarian Relief: Services to Survivors of Trafficking - Output Indicators

The following output indicators are required or optional based on total support amount for all Health and Humanitarian Relief partners who provide services to survivors of trafficking. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Health & Humanitarian Relief activities	Required v. Optional
# of survivors of trafficking receiving essential services	Required
# of survivors of trafficking participating in TUPSF-supported internships and other hands-on experiences	Required
# of survivors of trafficking receiving workforce readiness training	Required
# of training sessions conducted	Required
Was this training virtual or in-person	Required
Length of the training provided (in hours)	Required
Completion rate of the training for individuals (%)	Required
# of survivors of trafficking engaged in restorative/support services (such as individual counseling, group therapy)	Required
Average Net Promoter Score for workforce readiness trainings for survivors of trafficking	Optional
Average Net Promoter Score for restorative/support services for survivors of trafficking	Optional

Health and Humanitarian Relief: Services to Survivors of Trafficking - Outcome Indicators

The following outcome indicators are required or optional for all Health and Humanitarian Relief partners who provide services to survivors of trafficking. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Health & Humanitarian Relief activities	Required v. Optional
# of survivors of trafficking placed into a job by demographics and location	Required
% change in career readiness scores (as measured by the Career Resources Questionnaire)	Optional
# of survivors who transition to continue education	Optional
% of survivor recidivism	Optional
Survivor mental health score post services (mental health index)	Optional

Organizational Capacity Building Indicators

The following outcome indicators are required based on the program activities funded. We are interested in understanding the impact of The UPS Foundation funding/support on partner organizations, in addition to the potential impact on beneficiaries. For each indicator below you will be asked to indicate to what extent The UPS Foundation support you received has helped you, with response options “not at all,” “very little,” “somewhat,” and “significantly.” Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Organizational Capacity Building Indicators	Required v. Optional
Increased capacity for fundraising and capital development	Required
Ability to hire and/or retain qualified staff in all positions	Required
Ability to provide on-the-job training and learning opportunities to enhance staffs' program-related skills	Required
Ability to evaluate impact and make data-driven decisions	Required
Ability to implement new or innovative programs and/or expand existing programs	Required
Ability to incorporate principles related to equity and justice into program design or delivery	Required
Ability to create and test more innovative solutions or products	Required
Gained the knowledge or ability to carry out more technical or specialized work or to carry that work out more effectively.	Required

Systems Change Indicators – Output Indicators

The following output indicators are required or optional for all partners who focus on systems change. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Systems Change	Required v. Optional
# of exponential lives impacted	Required

Systems Change Indicators – Outcome Indicators

The following outcome indicators are required or optional based on the program activities funded. We are interested in understanding the impact of The UPS Foundation funding/support on the primary levers of systems change. For each indicator below, you will be asked to indicate how much progress your TUPSF-supported work made in these areas, with response options “not at all,” “very little,” “somewhat,” and “significantly.” Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply report a result of “not at all.”

Systems Change Levers	Required v. Optional
Policies related to better meeting needs within marginalized communities populated by underserved and underrepresented people have been created, adopted, and implemented. Note that this may include legislation as well as administrative/organizational policies and rules.	Required
Improved practices (including collaboration/coalition building, anti-racist practices, etc.) have been created and implemented by actors within the system your work/program is addressing.	Required
Best practices (including collaboration/coalition building, anti-racist practices, etc.) have been adopted by a broader swath of organizations	Required
Organizations have increased access to funding, human capital, information, and other resources.	Required
Actors within the system you are addressing have greater quantity and quality of connections with one another.	Required
Members of targeted populations/groups have assumed formal and informal leadership and decision-making positions within organizations.	Required
Attitudes and mental models have been shifted to embrace equity, inclusion, and justice more fully.	Required

Systems Change Indicators – Outcome Indicators

The following indicators will be required if you answered “somewhat” or “significantly” to the initial questions about systems change. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Policies related to better meeting needs within marginalized communities populated by underserved and underrepresented people are created, adopted, and implemented.	Required v. Optional
# laws or pieces of legislation have been adopted, improved, and/or implemented through the contributions of your TUPSF support.	Required
Open-ended: How has your work contributed to or guided the policy change process for key systems change policies?	Required
Open-ended: How many administrative or organizational policies/rules have been adopted that your work contributed to?	Required
Open-ended: What other actors did you collaborate with in order to build momentum for policy reform?	Required
Open-ended: How did your targeted populations benefit from the policy changes your work supported?	Required
Best practices (including collaboration/coalition building, anti-racist practices, etc.) are adopted by a broader swath of organization	Required v. Optional
Open-ended: Describe the creation and implementation of your improved practice(s), why these were necessary, and how they were identified as appropriate solutions.	Required
Open-ended: How has your work contributed to the increased adoption of best practices and encouraged the independent replication of your idea? i.e. How have you shaped or built the field?	Required

Systems Change Indicators – Outcome Indicators

The following indicators will be required if you answered “somewhat” or “significantly” to the initial questions about systems change. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Organizations have increased access to funding, human capital, information, and other resources.	Required v. Optional
Open-ended: How has your work facilitated the distribution of knowledge and information within the system?	Required
Open-ended: How has your work helped the reallocation of resources to support this system's change?	Required
% change in funding/staffing/resources/knowledge that your work helped support	Required
Actors have greater quantity and quality of connections with one another.	Required v. Optional
Open-ended: How has your work facilitated connectivity between key actors in the system?	Required
Open-ended: How has your contribution helped the movements grow in participation, reach, voice, and platform?	Required
Self-rating: How connected your organization feels to the other actors working towards this system's change.	Required

Systems Change Indicators – Outcome Indicators

The following indicators will be required if you answered “somewhat” or “significantly” to the initial questions about systems change. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Members of underserved/underrepresented groups hold formal and informal leadership and decision-making positions within organizations.	Required v. Optional
Assess the level of participation (participation ladder) in your work by the following groups you serve.	Required
Rate to what extent members of underserved/underrepresented groups/community members are involved in specific tasks listed.	Required
Open-ended: How is your work including local community members in the decision-making? Note: Decision-making/leadership can be both formal (e.g. elected positions) and informal (e.g. influence)	Required
Attitudes and mental models are shifted to embrace equity, inclusion, and justice more fully.	Required v. Optional
Open-ended: How has your work guided shifts in attitudes/mental models/public narratives and why does this matter? i.e., what levers are you pulling to try and influence the conversation more broadly and build demand?	Required



If you have questions or concerns about your Measurement and reporting requirements, please reach out directly to your UPS point of contact.

You have reached the end of this section of the guidebook. If you receive multiple forms of support from The UPS Foundation, please [return to the navigation page](#) to access the other section(s) of the guidebook relevant to your organization.



Priority Market Support **(Grants, In-kind Logistics and Delivery, & On-Loan Executives)**

Equity and Economic Empowerment

Measurement and Reporting Requirements

Measurement & Reporting Requirement Descriptions

Meetings



At Start of Partnership

MEL Kick-Off Meeting

Meeting (virtual) to finalize reporting requirements, required indicators, and formats and discuss any concerns or anticipated challenges.



Bi-Annual

Partnership Status Meetings

This meeting (virtual) will be an opportunity to check in with The UPS Foundation team on progress, accomplishments, upcoming project activities, and challenges faced. No slides are required. The project status update form submission will be the basis for the discussion. Questions that arise mid-cycle from both sides will be saved for this meeting.



At End of Support Period

Completion Meeting

This meeting provides a final opportunity for TUPSF and partners to connect to discuss achievements, lessons learned, and best practices.

Reports



Annual (\$100K+ Bi-Annual)

Partnership Status and Indicator Update

Concise update (via survey link) on key activities completed, progress against each of the goals, lessons learned, risks/challenges, and key accomplishments.



Annual

GRI Indicator Report*

A very brief report on key indicators, such as lives impacted and number of trees planted.



At End of Support Period

Completion Report

Comprehensive report (via survey link) that discusses project accomplishments, impacts, stories, lessons learned and progress for output, outcome, and systems indicators.



Variable

Post-Completion Follow-up

Submission (via survey link) seeking reporting on systems changes, outcomes, and output indicators one or more years post-completion enables TUPSF to assess changes that may be longer term in nature.

Other



Variable

Third-Party Impact Evaluation

Third-party evaluations provide robust and objective insights into the processes and achievements of projects, including providing credible evidence of *what worked, by how much, and why.*

Partnership Status and Indicator Update Form Details

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The form will request the following information:

lives positively impacted

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disasters responded to by location

countries reached by location

trees planted by location

female and small business owners connected to the global economy/acquired job readiness skills (in general and through UPS's Women Exporters Program)

young adults provided equitable access to academic support for college/career enrichment opportunities

exponential lives positively impacted (systems change work only)

Completion Report Form Details

The completion form submission is required once at the end of the funding cycle. The template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

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Organizational capacity building indicators and stories of impact for the supported organization

The UPS Foundation-required output- and outcome-level indicators

Sustainable Development Goals supported

Lessons learned in terms of what worked well and what did not work as anticipated/what might you have done differently

Breakdown of spending by categories

Specific stories of impact (individual- and/or community-level) highlighting the program's positive impacts for beneficiaries

Feedback on TUPSF support

Equity and Economic Empowerment: All Partners - Output Indicators

The following output indicators are required or optional for all Equity and Economic Empowerment partners. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Equity and Economic Empowerment activities	Required v. Optional
Total # of lives impacted by location, low-to-moderate income, disability, and demographics	Required
Country(ies), states, priority market supported	Required
Unit cost/ average dollar cost of delivering a single unit of your service to an individual (\$USD)	Optional

Indicator Guidance: Lives Impacted

All partners of The UPS Foundation are asked to report on the indicator "total # lives impacted," which contributes to our goal of positively impacting one billion lives by 2040. We ask that partners report on the lives directly impacted in the work supported by The UPS Foundation partnership. As a general rule, you should not report on the total number of individuals in an affected geographic region, individuals served/trained through non-UPS funding, or media visits/views. We highly encourage you to review your methodology to avoid double counting; for example, if you count both the number of individuals trained and the number of individuals placed into jobs, please de-duplicate these numbers before reporting on the total lives impacted.

Examples of figures that are considered valid or invalid for inclusion in your reporting based on The UPS Foundation Program Activities are included in the [Appendix](#) to this guidebook.

For additional guidance or to discuss your proposed methodology for calculating lives impacted, please reach out to your UPS point of contact.

Equity and Economic Empowerment: All Partners - Outcome Indicators

The following outcome indicators are required or optional for all Equity and Economic Empowerment partners. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Equity and Economic Empowerment activities	Required v. Optional
% of women involved in making major household decisions	Required
% of women who report confidence in using financial products or services	Required
# of workers placed into a job by demographics and location	Required
# of individuals hired who were previously unemployed	Required
% change in beneficiaries' well-being score (as measured by WHO-5 or similar)	Required
# of businesses that scaled up as a result of TUPSF support by business owner demographics	Required
# of businesses that reported increased revenue based on the support provided by TUPSF	Required
# of jobs created	Required
Average change in financial well-being for beneficiaries within 12 mos. of program completion (pre-/post-intervention) (based on CFPB financial well-being score or equivalent)	Optional
% change in beneficiary wages within 12 months of program completion (pre-/post-intervention) by demographics	Optional
% change in beneficiaries' resilience score (as measured by the Brief Resilience Scale)	Optional
% change in beneficiaries' perception of neighborhood safety	Optional

Equity and Economic Empowerment: Workforce and Leadership Development Activities - Output Indicators

The following output indicators are required or optional for all Equity and Economic Empowerment partners who conduct training and mentorship activities focused on workforce and/or leadership development. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Equity and Economic Empowerment activities	Required v. Optional
# of individuals who received trainings (disaggregated by workforce readiness, leadership, other)	Required
# training sessions conducted	Required
Completion rate of trainings (%)	Required
Length of training provided (in hours)	Required
Was the training virtual or in person	Required
# individuals who participated in mentorship	Required
# of individuals participating in TUPSF-supported internships and other hands-on experiences	Required
Average Net Promoter Score (NPS) for trainings	Optional
Average Net Promoter Score (NPS) for mentorship	Optional
# of new training modules developed	Optional

Equity and Economic Empowerment: Workforce and Leadership Development Activities - Outcome Indicators

The following outcome indicators are required or optional for all Equity and Economic Empowerment partners who conduct training and mentorship activities focused on workforce and/or leadership development. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Equity and Economic Empowerment activities	Required v. Optional
% change in leadership self-efficacy (pre-/post program)	Required
# of supported individuals who transition to employment/further education	Required
# of workers placed into a job by demographics and location	Required
# of individuals placed into a part-time job	Required
# of individuals placed into a full-time job	Required
# of individuals hired who were previously unemployed	Required

Equity and Economic Empowerment: Workforce and Leadership Development Activities - Outcome Indicators Cont.

The following outcome indicators are required or optional for all Equity and Economic Empowerment partners who conduct training and mentorship activities focused on workforce and/or leadership development. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Equity and Economic Empowerment activities	Required v. Optional
# of supported individuals placed into a job that provides health insurance benefits	Required
# of supported individuals who retain their job for 6 months or more after starting	Optional
# of supported individuals who advanced their career within 12 months of program completion	Optional
# of supported individuals who transitioned from one job to another as a result of program participation	Optional
# of supported individuals who report they are able to cover their rent/ mortgage with their current income	Optional
# of individuals who report greater confidence in their job-related skills or abilities	Optional
% change in career readiness scores (as measured by the Career Resources Questionnaire)	Optional

Equity and Economic Empowerment: Education Activities - Output & Outcome Indicators

The following output and outcome indicators are required or optional for all Equity and Economic Empowerment partners who conduct education-focused activities. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Equity and Economic Empowerment activities	Required v. Optional
Total # participants, by demographics	Required
Total # individuals receiving support services	Required
Average Net Promoter Score (NPS) for educational programming	Optional

Outcome indicators for Equity and Economic Empowerment activities	Required v. Optional
Graduation rate for participants	Required
# of supported individuals who transition to employment/further education	Required
% change in career readiness scores (as measured by the Career Resources Questionnaire)	Optional

Equity and Economic Empowerment: SME/SMB - Output Indicators

The following output indicators are required or optional for all Equity and Economic Empowerment partners who distribute microloans and provide SMB/SME training. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Equity and Economic Empowerment activities	Required v. Optional
# of businesses supported, by demographics of business owner	Required
Total # of employees of small businesses supported	Required
Average revenue (\$USD) of small businesses supported	Required
# and dollar value of microloans, small business loans, and seed funding distributed	Required
# of recipients of microloans, small business loans, and seed funding by gender	Required
# and dollar value of microloans, small business loans, and seed funding distributed to women owned businesses	Required
# of microloans, small business loans, and seed funding by purpose	Optional
# of businesses supported by industry	Optional
# of small businesses supported with e-commerce business model	Optional
Average Net Promoter Score (NPS) for microloan, small business loan, and seed funding program	Optional

Equity and Economic Empowerment: SME/SMB - Output Indicators Cont.

The following output indicators are required or optional for all Equity and Economic Empowerment partners who distribute microloans and provide SME/SMB training. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Equity and Economic Empowerment activities	Required v. Optional
# of individuals who received trainings, by gender	Required
# training sessions conducted	Required
Was this training virtual or in person	Required
Length of training (in hours)	Required
Training completion rate (%)	Required
Total hours of advisory services/training/capacity building activities/technical assistance provided to small businesses	Optional
# of businesses supported by industry	Optional
# of products/services developed/implemented in coordination with government bodies	Optional
# of products/ services developed or new partnerships established to improve resource flows to women entrepreneurs	Optional
Average Net Promoter Score (NPS) for trainings	Optional

Equity and Economic Empowerment: SME/SMB - Outcome Indicators

The following outcome indicators are required or optional based on total support amount for all Equity and Economic Empowerment partners who distribute microloans and provide SME/SMB training. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Equity and Economic Empowerment activities	Required v. Optional
% change in entrepreneurial self-efficacy (pre/post program), by gender	Required
# of businesses that scaled up as a result of TUPSF support by business owner demographics	Required
# of businesses that reported increased revenue based on the support provided by TUPSF	Required
# of jobs created	Required
# of female small business owners in your program that are connected to the global economy	Required
# of micro businesses that scaled to small businesses	Optional

Equity and Economic Empowerment: Advocacy - Output Indicators

The following output indicators are required or optional for all Equity and Economic Empowerment partners who focus on advocacy. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Equity and Economic Empowerment activities	Required v. Optional
Explanation of how key issue area(s) were identified and defined	Required
# of organizations attending meetings/assemblies around issue(s) of focus	Required
# of participants at advocacy events	Required
# of individuals targeted with information about issue(s) of focus	Optional

Equity and Economic Empowerment: Advocacy - Outcome Indicators

The following outcome indicators are required or optional for all Equity and Economic Empowerment partners who focus on advocacy. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Equity and Economic Empowerment activities	Required v. Optional
# of organizations actively involved in coalition around issue of focus	Required
# of new champions/advocates recruited, including new constituencies represented	Required
# of elected officials who publicly support the campaign	Required
# of litigation in favor of the program's position	Required
% of target audience who believe that the issue is important to them	Optional
# of individuals providing donations to support the initiative	Optional
% of desired actions taken by government agency(ies)	Optional

Equity and Economic Empowerment: Research & Innovation - Output & Outcome Indicators

The following output and outcome indicators are required or optional for all Equity and Economic Empowerment partners who do research/innovation. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Equity and Economic Empowerment activities	Required v. Optional
Tell us about the innovation-focused work that TUPSF support enabled	Required
Outcome indicators for Equity and Economic Empowerment activities	Required v. Optional
Description of the adoption or utilization of innovative solutions driven by TUPSF-supported work	Optional

Organizational Capacity Building Indicators

The following outcome indicators are required based on the program activities funded. We are interested in understanding the impact of The UPS Foundation funding/support on partner organizations, in addition to the potential impact on beneficiaries. For each indicator below you will be asked to indicate to what extent The UPS Foundation support you received has helped you, with response options “not at all,” “very little,” “somewhat,” and “significantly.” Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Organizational Capacity Building Indicators	Required v. Optional
Increased capacity for fundraising and capital development	Required
Ability to hire and/or retain qualified staff in all positions	Required
Ability to provide on-the-job training and learning opportunities to enhance staffs' program-related skills	Required
Ability to evaluate impact and make data-driven decisions	Required
Ability to implement new or innovative programs and/or expand existing programs	Required
Ability to incorporate principles related to equity and justice into program design or delivery	Required
Ability to create and test more innovative solutions or products	Required
Gained the knowledge or ability to carry out more technical or specialized work or to carry that work out more effectively.	Required

Systems Change Indicators – Output Indicators

The following output indicators are required or optional for all partners who focus on systems change. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Systems Change	Required v. Optional
# of exponential lives impacted	Required

Systems Change Indicators – Outcome Indicators

The following outcome indicators are required or optional based on the program activities funded. We are interested in understanding the impact of The UPS Foundation funding/support on the primary levers of systems change. For each indicator below, you will be asked to indicate how much progress your TUPSF-supported work made in these areas, with response options “not at all,” “very little,” “somewhat,” and “significantly.” Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply report a result of “not at all.”

Systems Change Levers	Required v. Optional
Policies related to better meeting needs within marginalized communities populated by underserved and underrepresented people have been created, adopted, and implemented. Note that this may include legislation as well as administrative/organizational policies and rules.	Required
Improved practices (including collaboration/coalition building, anti-racist practices, etc.) have been created and implemented by actors within the system your work/program is addressing.	Required
Best practices (including collaboration/coalition building, anti-racist practices, etc.) have been adopted by a broader swath of organizations	Required
Organizations have increased access to funding, human capital, information, and other resources.	Required
Actors within the system you are addressing have greater quantity and quality of connections with one another.	Required
Members of targeted populations/groups have assumed formal and informal leadership and decision-making positions within organizations.	Required
Attitudes and mental models have been shifted to embrace equity, inclusion, and justice more fully.	Required

Systems Change Indicators – Outcome Indicators

The following indicators will be required if you answered “somewhat” or “significantly” to the initial questions about systems change. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Policies related to better meeting needs within marginalized communities populated by underserved and underrepresented people are created, adopted, and implemented.	Required v. Optional
# laws or pieces of legislation have been adopted, improved, and/or implemented through the contributions of your TUPSF support.	Required
Open-ended: How has your work contributed to or guided the policy change process for key systems change policies?	Required
Open-ended: How many administrative or organizational policies/rules have been adopted that your work contributed to?	Required
Open-ended: What other actors did you collaborate with in order to build momentum for policy reform?	Required
Open-ended: How did your targeted populations benefit from the policy changes your work supported?	Required
Best practices (including collaboration/coalition building, anti-racist practices, etc.) are adopted by a broader swath of organization	Required v. Optional
Open-ended: Describe the creation and implementation of your improved practice(s), why these were necessary, and how they were identified as appropriate solutions.	Required
Open-ended: How has your work contributed to the increased adoption of best practices and encouraged the independent replication of your idea? i.e. How have you shaped or built the field?	Required

Systems Change Indicators – Outcome Indicators

The following indicators will be required if you answered “somewhat” or “significantly” to the initial questions about systems change. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Organizations have increased access to funding, human capital, information, and other resources.	Required v. Optional
Open-ended: How has your work facilitated the distribution of knowledge and information within the system?	Required
Open-ended: How has your work helped the reallocation of resources flow into the system?	Required
% change in funding/staffing/resources/knowledge that your work helped support	Required

Actors have greater quantity and quality of connections with one another.	Required v. Optional
Open-ended: How has your work facilitated connectivity between key actors in the system?	Required
Open-ended: How has your contribution helped the movements grow in participation, reach, voice, and platform?	Required
Self-rating: How connected your organization feels to the other actors working towards this system's change.	Required

Systems Change Indicators – Outcome Indicators

The following indicators will be required if you answered “somewhat” or “significantly” to the initial questions about systems change. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Members of underserved/underrepresented groups hold formal and informal leadership and decision-making positions within organizations.	Required v. Optional
Assess the level of participation (participation ladder) in your work by the following groups you serve.	Required
Rate to what extent members of underserved/underrepresented groups/community members are involved in specific tasks listed.	Required
Open-ended: How is your work including local community members in the decision-making? Note: Decision-making/leadership can be both formal (e.g. elected positions) and informal (e.g. influence)	Required
Attitudes and mental models are shifted to embrace equity, inclusion, and justice more fully.	Required v. Optional
Open-ended: How has your work guided shifts in attitudes/mental models/public narratives and why does this matter? i.e., what levers are you pulling to try and influence the conversation more broadly and build demand?	Required



If you have questions or concerns about your Measurement and reporting requirements, please reach out directly to your UPS point of contact.

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Priority Market Support (Grants, In-kind Logistics and Delivery, & On-Loan Executives)

Local Community Engagement

Measurement and Reporting Requirements

Measurement & Reporting Requirement Descriptions

Meetings



At Start of Partnership

MEL Kick-Off Meeting

Meeting (virtual) to finalize reporting requirements, required indicators, and formats and discuss any concerns or anticipated challenges.



Bi-Annual

Partnership Status Meetings

This meeting (virtual) will be an opportunity to check in with The UPS Foundation team on progress, accomplishments, upcoming project activities, and challenges faced. No slides are required. The project status update form submission will be the basis for the discussion. Questions that arise mid-cycle from both sides will be saved for this meeting.



At End of Support Period

Completion Meeting

This meeting provides a final opportunity for TUPSF and partners to connect to discuss achievements, lessons learned, and best practices.

Reports



Annual (\$100K+ Bi-Annual)

Partnership Status and Indicator Update

Concise update (via survey link) on key activities completed, progress against each of the goals, lessons learned, risks/challenges, and key accomplishments.



Annual

GRI Indicator Report*

A very brief report on key indicators, such as lives impacted and number of trees planted.



At End of Support Period

Completion Report

Comprehensive report (via survey link) that discusses project accomplishments, impacts, stories, lessons learned and progress for output, outcome, and systems indicators.



Variable

Post-Completion Follow-up

Submission (via survey link) seeking reporting on systems changes, outcomes, and output indicators one or more years post-completion enables TUPSF to assess changes that may be longer term in nature.

Other



Variable

Third-Party Impact Evaluation

Third-party evaluations provide robust and objective insights into the processes and achievements of projects, including providing credible evidence of *what worked, by how much, and why.*

Partnership Status and Indicator Update Form Details

Partners are required to submit a partnership status and indicator update form on an annual basis and bi-annual if over \$100k. The form template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

The UPS Foundation requires reporting on specific output- and outcome-level indicators to enable aggregation at the portfolio level. However, The UPS Foundation also values the unique impact of each partner so includes room for partners to share any additional indicators that help to communicate their impact.

The form will request the following information:

Geographic location of TUPSF support provided

Major accomplishments, milestones, and activities during the support period

Activities and milestones anticipated in the next 3-6 months

Progress toward short-term goals

Program risks and lessons learned

Impact of The UPS Foundation support on organizational capacity

Impact of The UPS Foundation support on intended beneficiaries

The UPS Foundation-required output- and outcome-level indicators

Specific stories of impact (individual- and/or community-level) highlighting the program's positive impacts for beneficiaries

Details on funding utilization/budget

Feedback on TUPSF support

Partners who receive funding of \$15,000 or more are required to submit a GRI Indicator Report on an annual basis. This very brief report focuses on a calendar year (January 1 - December 31) and is due mid-December. The form template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

The form will request the following information:

lives positively impacted

vaccines delivered in-kind to countries in need, by kind/type

disasters responded to by location

countries reached by location

trees planted by location

female and small business owners connected to the global economy/acquired job readiness skills (in general and through UPS's Women Exporters Program)

young adults provided equitable access to academic support for college/career enrichment opportunities

exponential lives positively impacted (systems change work only)

Completion Report Form Details

The completion form submission is required once at the end of the funding cycle. The template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

The UPS Foundation requires reporting on specific output- and outcome-level indicators to enable aggregation at the portfolio level. However, The UPS Foundation also values the unique impact of each partner so includes room for partners to share any additional indicators that help to communicate their impact.

The form will request the following information:

Summary of impact of The UPS Foundation support on intended beneficiaries

Key activities and milestones completed during the reporting period

Progress toward goals of TUPSF support

Organizational capacity building indicators and stories of impact for the supported organization

The UPS Foundation-required output- and outcome-level indicators

Sustainable Development Goals supported

Lessons learned in terms of what worked well and what did not work as anticipated/what might you have done differently

Breakdown of spending by categories

Specific stories of impact (individual- and/or community-level) highlighting the program's positive impacts for beneficiaries

Feedback on TUPSF support

Local Community Engagement: All Partners - Output Indicators

The following output indicators are required or optional for all Local Community Engagement partners. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Local Community Engagement activities	Required v. Optional
Total # of lives impacted by location, low-to-moderate income, disability, and demographics	Required
Country(ies), states, priority market supported	Required
Unit cost/ average dollar cost of delivering a single unit of your service to an individual (\$USD)	Optional

Indicator Guidance: Lives Impacted

All partners of The UPS Foundation are asked to report on the indicator "total # lives impacted," which contributes to our goal of positively impacting one billion lives by 2040. We ask that partners report on the lives directly impacted in the work supported by The UPS Foundation partnership. As a general rule, you should not report on the total number of individuals in an affected geographic region, individuals served/trained through non-UPS funding, or media visits/views. We highly encourage you to review your methodology to avoid double counting; for example, if you count both the number of individuals trained and the number of individuals placed into jobs, please de-duplicate these numbers before reporting on the total lives impacted.

Examples of figures that are considered valid or invalid for inclusion in your reporting based on The UPS Foundation Program Activities are included in the [Appendix](#) to this guidebook.

For additional guidance or to discuss your proposed methodology for calculating lives impacted, please reach out to your UPS point of contact.

Local Community Engagement: Volunteerism - Output & Outcome Indicators

The following output and outcome indicators are required or optional for all partners who engage with UPS-sponsored volunteer events. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Volunteer Activities	Required v. Optional
# of UPS employee and friend/family volunteers	Required
Total # of lives impacted as a result of volunteer activities (e.g. individuals receiving meals, lawn care assistance, etc.)	Required
Location(s) of volunteer activities (country; state; city <u>and</u> whether location is considered underserved or predominantly Black)	Required
Media stories related to UPS volunteerism with your organization	Optional
Outcome indicators for Volunteer Activities	Required v. Optional
Stories of impact from volunteer event (for individuals and/or communities)	Required
Satisfaction with volunteer support	Required
Open-ended: Briefly describe your experience with TUPSF volunteer support	Required

Organizational Capacity Building Indicators

The following outcome indicators are required based on the program activities funded. We are interested in understanding the impact of The UPS Foundation funding/support on partner organizations, in addition to the potential impact on beneficiaries. For each indicator below you will be asked to indicate to what extent The UPS Foundation support you received has helped you, with response options “not at all,” “very little,” “somewhat,” and “significantly.” Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Organizational Capacity Building Indicators	Required v. Optional
Increased capacity for fundraising and capital development	Required
Ability to hire and/or retain qualified staff in all positions	Required
Ability to provide on-the-job training and learning opportunities to enhance staffs' program-related skills	Required
Ability to evaluate impact and make data-driven decisions	Required
Ability to implement new or innovative programs and/or expand existing programs	Required
Ability to incorporate principles related to equity and justice into program design or delivery	Required
Ability to create and test more innovative solutions or products	Required
Gained the knowledge or ability to carry out more technical or specialized work or to carry that work out more effectively.	Required



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**Priority Market Support
(Grants, In-kind Logistics and
Delivery, & On-Loan Executives)**

Planet Protection

**Measurement and Reporting
Requirements**

Measurement & Reporting Requirement Descriptions

Meetings



At Start of Partnership

MEL Kick-Off Meeting

Meeting (virtual) to finalize reporting requirements, required indicators, and formats and discuss any concerns or anticipated challenges.



Bi-Annual

Partnership Status Meetings

This meeting (virtual) will be an opportunity to check in with The UPS Foundation team on progress, accomplishments, upcoming project activities, and challenges faced. No slides are required. The project status update form submission will be the basis for the discussion. Questions that arise mid-cycle from both sides will be saved for this meeting.



At End of Support Period

Completion Meeting

This meeting provides a final opportunity for TUPSF and partners to connect to discuss achievements, lessons learned, and best practices.

Reports



Annual (\$100K+ Bi-Annual)

Partnership Status and Indicator Update

Concise update (via survey link) on key activities completed, progress against each of the goals, lessons learned, risks/challenges, and key accomplishments.



Annual

GRI Indicator Report*

A very brief report on key indicators, such as lives impacted and number of trees planted.



At End of Support Period

Completion Report

Comprehensive report (via survey link) that discusses project accomplishments, impacts, stories, lessons learned and progress for output, outcome, and systems indicators.



Variable

Post-Completion Follow-up

Submission (via survey link) seeking reporting on systems changes, outcomes, and output indicators one or more years post-completion enables TUPSF to assess changes that may be longer term in nature.

Other



Variable

Third-Party Impact Evaluation

Third-party evaluations provide robust and objective insights into the processes and achievements of projects, including providing credible evidence of *what worked, by how much, and why.*

Partnership Status and Indicator Update Form Details

Partners are required to submit a partnership status and indicator update form on an annual basis and bi-annual if over \$100k. The form template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

The UPS Foundation requires reporting on specific output- and outcome-level indicators to enable aggregation at the portfolio level. However, The UPS Foundation also values the unique impact of each partner so includes room for partners to share any additional indicators that help to communicate their impact.

The form will request the following information:

Geographic location of TUPSF support provided

Major accomplishments, milestones, and activities during the support period

Activities and milestones anticipated in the next 3-6 months

Progress toward short-term goals

Program risks and lessons learned

Impact of The UPS Foundation support on organizational capacity

Impact of The UPS Foundation support on intended beneficiaries

The UPS Foundation-required output- and outcome-level indicators

Specific stories of impact (individual- and/or community-level) highlighting the program's positive impacts for beneficiaries

Details on funding utilization/budget

Feedback on TUPSF support

Partners who receive funding of \$15,000 or more are required to submit a GRI Indicator Report on an annual basis. This very brief report focuses on a calendar year (January 1 - December 31) and is due mid-December. The form template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

The form will request the following information:

lives positively impacted

vaccines delivered in-kind to countries in need, by kind/type

disasters responded to by location

countries reached by location

trees planted by location

female and small business owners connected to the global economy/acquired job readiness skills (in general and through UPS's Women Exporters Program)

young adults provided equitable access to academic support for college/career enrichment opportunities

exponential lives positively impacted (systems change work only)

Completion Report Form Details

The completion form submission is required once at the end of the funding cycle. The template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

The UPS Foundation requires reporting on specific output- and outcome-level indicators to enable aggregation at the portfolio level. However, The UPS Foundation also values the unique impact of each partner so includes room for partners to share any additional indicators that help to communicate their impact.

The form will request the following information:

Summary of impact of The UPS Foundation support on intended beneficiaries

Key activities and milestones completed during the reporting period

Progress toward goals of TUPSF support

Organizational capacity building indicators and stories of impact for the supported organization

The UPS Foundation-required output- and outcome-level indicators

Sustainable Development Goals supported

Lessons learned in terms of what worked well and what did not work as anticipated/what might you have done differently

Breakdown of spending by categories

Specific stories of impact (individual- and/or community-level) highlighting the program's positive impacts for beneficiaries

Feedback on TUPSF support

Planet Protection: All Partners - Output Indicators

The following output indicators are required or optional for all Planet Protect partners. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Planet Protection activities	Required v. Optional
Total # lives impacted, by location, low-to-moderate income, disability, and demographics	Required
Country(ies), states, priority market supported	Required
# trees planted, by type (e.g. lumber/ fruit) and location	Required
# trees planted, by target environment (e.g. schools; watershed/riparian restoration; forest fire restoration; urban areas, communities affected by disaster)	Optional
# agroforestry projects funded, by location	Optional
Unit cost/ average dollar cost of delivering a single unit of your service to an individual (\$USD)	Optional

Indicator Guidance: Lives Impacted

All partners of The UPS Foundation are asked to report on the indicator "total # lives impacted," which contributes to our goal of positively impacting one billion lives by 2040. We ask that partners report on the lives directly impacted in the work supported by The UPS Foundation partnership. As a general rule, you should not report on the total number of individuals in an affected geographic region, individuals served/trained through non-UPS funding, or media visits/views. We highly encourage you to review your methodology to avoid double counting; for example, if you count both the number of individuals trained and the number of individuals placed into jobs, please de-duplicate these numbers before reporting on the total lives impacted.

Examples of figures that are considered valid or invalid for inclusion in your reporting based on The UPS Foundation Program Activities are included in the [Appendix](#) to this guidebook.

For additional guidance or to discuss your proposed methodology for calculating lives impacted, please reach out to your UPS point of contact.

Planet Protection: All Partners - Outcome Indicators

The following outcome indicators are required or optional for all Planet Protect partners. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Planet Protection activities	Required v. Optional
Average survival rate of trees planted	Required
# of individuals with increased income (self-reported) by demographics	Required
Stories of impact by city/country describing the benefit of tree planting (e.g. providing shade in a schoolyard)	Required
# acres/hectares of land preserved or restored (i.e., bio-diversity)	Optional
# acres/hectares of land improved or maintained (i.e., cleaning up trash/weeding)	Optional
# farmers implementing land and forest management practices	Optional

Planet Protection: Training Activities - Output Indicators

The following output indicators are required or optional for all Planet Protect partners who do training activities. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Planet Protection activities	Required v. Optional
# training sessions conducted	Required
Was this training virtual or in-person	Required
Training completion rate (%)	Required
What is the length of the training provided (in hours)	Required
# of individuals received training	Required
Average Net Promoter Score (NPS) for training sessions	Optional

Planet Protection: Research & Innovation - Output & Outcome Indicators

The following output and outcome indicators are required or optional for all Planet Protection partners who do research/innovation. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Planet Protection activities	Required v. Optional
Tell us about the innovation-focused work that TUPSF support enabled	Required
Outcome indicators for Planet Protection activities	Required v. Optional
Description of the adoption or utilization of innovative solutions driven by TUPSF-supported work	Optional

Planet Protection: Hiring/Job Creation Related to Tree Planting - Output & Outcome Indicators

The following output indicators are required or optional for all Planet Protect partners who do hiring/job creation related to tree planting. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Planet Protection activities	Required v. Optional
# of jobs created/supported for tree planting initiatives by demographics	Required
# of individuals hired for tree planting initiatives by demographics	Optional
# of individuals hired for tree planting initiatives who were previously unemployed by demographics	Optional
# of individuals hired for tree planting initiatives in long-term positions (without a discrete end date) by demographics	Optional

Outcome indicators for Planet Protection activities	Required v. Optional
Average change in financial well-being for beneficiaries within 12 months of program completion (pre-/post-intervention) (based on CFPB financial well-being score or equivalent)	Optional

Organizational Capacity Building Indicators

The following outcome indicators are required based on the program activities funded. We are interested in understanding the impact of The UPS Foundation funding/support on partner organizations, in addition to the potential impact on beneficiaries. For each indicator below you will be asked to indicate to what extent The UPS Foundation support you received has helped you, with response options “not at all,” “very little,” “somewhat,” and “significantly.” Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Organizational Capacity Building Indicators	Required v. Optional
Increased capacity for fundraising and capital development	Required
Ability to hire and/or retain qualified staff in all positions	Required
Ability to provide on-the-job training and learning opportunities to enhance staffs' program-related skills	Required
Ability to evaluate impact and make data-driven decisions	Required
Ability to implement new or innovative programs and/or expand existing programs	Required
Ability to incorporate principles related to equity and justice into program design or delivery	Required
Ability to create and test more innovative solutions or products	Required
Gained the knowledge or ability to carry out more technical or specialized work or to carry that work out more effectively.	Required

Systems Change Indicators – Output Indicators

The following output indicators are required or optional for all partners who focus on systems change. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Systems Change	Required v. Optional
# of exponential lives impacted	Required

Systems Change Indicators – Outcome Indicators

The following outcome indicators are required or optional based on the program activities funded. We are interested in understanding the impact of The UPS Foundation funding/support on the primary levers of systems change. For each indicator below, you will be asked to indicate how much progress your TUPSF-supported work made in these areas, with response options “not at all,” “very little,” “somewhat,” and “significantly.” Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply report a result of “not at all.”

Systems Change Levers	Required v. Optional
Policies related to better meeting needs within marginalized communities populated by underserved and underrepresented people have been created, adopted, and implemented. Note that this may include legislation as well as administrative/organizational policies and rules.	Required
Improved practices (including collaboration/coalition building, anti-racist practices, etc.) have been created and implemented by actors within the system your work/program is addressing.	Required
Best practices (including collaboration/coalition building, anti-racist practices, etc.) have been adopted by a broader swath of organizations	Required
Organizations have increased access to funding, human capital, information, and other resources.	Required
Actors within the system you are addressing have greater quantity and quality of connections with one another.	Required
Members of targeted populations/groups have assumed formal and informal leadership and decision-making positions within organizations.	Required
Attitudes and mental models have been shifted to embrace equity, inclusion, and justice more fully.	Required

Systems Change Indicators – Outcome Indicators

The following indicators will be required if you answered “somewhat” or “significantly” to the initial questions about systems change. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Policies related to better meeting needs within marginalized communities populated by underserved and underrepresented people are created, adopted, and implemented.	Required v. Optional
# laws or pieces of legislation have been adopted, improved, and/or implemented through the contributions of your TUPSF support.	Required
Open-ended: How has your work contributed to or guided the policy change process for key systems change policies?	Required
Open-ended: How many administrative or organizational policies/rules have been adopted that your work contributed to?	Required
Open-ended: What other actors did you collaborate with in order to build momentum for policy reform?	Required
Open-ended: How did your targeted populations benefit from the policy changes your work supported?	Required
Best practices (including collaboration/coalition building, anti-racist practices, etc.) are adopted by a broader swath of organization	Required v. Optional
Open-ended: Describe the creation and implementation of your improved practice(s), why these were necessary, and how they were identified as appropriate solutions.	Required
Open-ended: How has your work contributed to the increased adoption of best practices and encouraged the independent replication of your idea? i.e. How have you shaped or built the field?	Required

Systems Change Indicators – Outcome Indicators

The following indicators will be required if you answered “somewhat” or “significantly” to the initial questions about systems change. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Organizations have increased access to funding, human capital, information, and other resources.	Required v. Optional
Open-ended: How has your work facilitated the distribution of knowledge and information within the system?	Required
Open-ended: How has your work helped the reallocation of resources flow into the system?	Required
% change in funding/staffing/resources/knowledge that your work helped support	Required
Actors have greater quantity and quality of connections with one another.	Required v. Optional
Open-ended: How has your work facilitated connectivity between key actors in the system?	Required
Open-ended: How has your contribution helped the movements grow in participation, reach, voice, and platform?	Required
Self-rating: How connected your organization feels to the other actors working towards this system's change.	Required

Systems Change Indicators – Outcome Indicators

The following indicators will be required if you answered “somewhat” or “significantly” to the initial questions about systems change.

Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Members of underserved/underrepresented groups hold formal and informal leadership and decision-making positions within organizations.	Required v. Optional
Assess the level of participation (participation ladder) in your work by the following groups you serve.	Required
Rate to what extent members of underserved/underrepresented groups/community members are involved in specific tasks listed.	Required
Open-ended: How is your work including local community members in the decision-making? Note: Decision-making/leadership can be both formal (e.g. elected positions) and informal (e.g. influence)	Required
Attitudes and mental models are shifted to embrace equity, inclusion, and justice more fully.	Required v. Optional
Open-ended: How has your work guided shifts in attitudes/mental models/public narratives and why does this matter? i.e., what levers are you pulling to try and influence the conversation more broadly and build demand?	Required



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Signature or Community Partners (Grants, In-kind Logistics and Delivery, & On-Loan Executives)

Health and Humanitarian Relief

Measurement and Reporting Requirements

Meetings



There are no required MEL meetings for organizations receiving support at the Community Partner level.

Reports



Annual**

Partnership Status and Indicator Update

Concise update (via survey link) on key activities completed, progress against each of the grant goals, grant spending (budget vs. actual), lessons learned, risks/challenges, and key accomplishments.



Annual

GRI Indicator Report*

A very brief report on key indicators, such as lives impacted and number of trees planted.



At End of Support Period

Completion Report

Comprehensive report (via survey link) that discusses project accomplishments, impacts, stories, lessons learned and progress for output, outcome, and systems indicators.



Variable

Post-Completion Follow-up Submission (via survey link) seeking reporting on systems changes, outcomes, and output indicators one or more years post-completion (for large grantees) enables TUPSF to assess changes that may be longer term in nature.

*The GRI Indicator Report is only required for grantees receiving \$15,000+ in support from TUPSF.

**Annual reports will only be required if funds are provided for multiple years.

[Click here to return to the navigation page](#)

Partnership Status and Indicator Update Form Details

Signature and Community Partners with multi-year funding are required to submit a partnership status and indicator update form on an annual basis. The form template will be shared via survey link in an email from The UPS Foundation at least one month before the due date. This report is not required for single-year funding cycles.

The UPS Foundation requires reporting on specific output- and outcome-level indicators to enable aggregation at the portfolio level. However, The UPS Foundation also values the unique impact of each partner so includes room for partners to share any additional indicators that help to communicate their impact.

The form will request the following information:

Geographic location of TUPSF support provided

Major accomplishments, milestones, and activities during the support period

Activities and milestones anticipated in the next 3-6 months

Progress toward short-term goals

Program risks and lessons learned

Impact of The UPS Foundation support on organizational capacity

Impact of The UPS Foundation support on intended beneficiaries

The UPS Foundation-required output- and outcome-level indicators

Specific stories of impact (individual- and/or community-level) highlighting the program's positive impacts for beneficiaries

Details on funding utilization/budget

Feedback on TUPSF support

GRI Indicator Report

Partners who receive funding of \$15,000 or more are required to submit a GRI Indicator Report on an annual basis. This very brief report focuses on a calendar year (January 1 - December 31) and is due mid-December. The form template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

The form will request the following information:

lives positively impacted

vaccines delivered in-kind to countries in need, by kind/type

disasters responded to by location

countries reached by location

trees planted by location

female and small business owners connected to the global economy/acquired job readiness skills (in general and through UPS's Women Exporters Program)

young adults provided equitable access to academic support for college/career enrichment opportunities

exponential lives positively impacted (systems change work only)

Completion Report Form Details

The completion form submission is required once at the end of the funding cycle. The template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

The UPS Foundation requires reporting on specific output- and outcome-level indicators to enable aggregation at the portfolio level. However, The UPS Foundation also values the unique impact of each partner so includes room for partners to share any additional indicators that help to communicate their impact.

The form will request the following information:

Summary of impact of The UPS Foundation support on intended beneficiaries

Key activities and milestones completed during the reporting period

Progress toward goals of TUPSF support

Organizational capacity building indicators and stories of impact for the supported organization

The UPS Foundation-required output- and outcome-level indicators

Sustainable Development Goals supported

Lessons learned in terms of what worked well and what did not work as anticipated/what might you have done differently

Breakdown of spending by categories

Specific stories of impact (individual- and/or community-level) highlighting the program's positive impacts for beneficiaries

Feedback on TUPSF support

Health and Humanitarian Relief: All Partners - Output Indicators

The following output indicators are required or optional for all Health and Humanitarian Relief partners. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Health & Humanitarian Relief activities	Required v. Optional
Total # lives impacted by direct support or other organizations, by location, low-to-moderate income, disability, and demographics	Required
Country(ies), states, priority markets supported	Required
# deliveries completed	Required
# supplies delivered by supply type (food; vaccines (by type); medicine; other)	Required
# vaccines and medicines delivered by ministries of health and other organizations due to the logistics or supply chain optimization UPS put in place (by type) (ex: ultra cold freezers)	Optional
Unit cost/ average dollar cost of delivering a single unit of your service to an individual (\$USD)	Optional

Indicator Guidance: Lives Impacted

All partners of The UPS Foundation are asked to report on the indicator "total # lives impacted," which contributes to our goal of positively impacting one billion lives by 2040. We ask that partners report on the lives directly impacted in the work supported by The UPS Foundation partnership. As a general rule, you should not report on the total number of individuals in an affected geographic region, individuals served/trained through non-UPS funding, or media visits/views. We highly encourage you to review your methodology to avoid double counting; for example, if you count both the number of individuals trained and the number of individuals placed into jobs, please de-duplicate these numbers before reporting on the total lives impacted.

Examples of figures that are considered valid or invalid for inclusion in your reporting based on The UPS Foundation Program Activities are included in the [Appendix](#) to this guidebook.

For additional guidance or to discuss your proposed methodology for calculating lives impacted, please reach out to your UPS point of contact.

Health and Humanitarian Relief: All Partner - Outcome Indicators

The following outcome indicators are required or optional for all Health and Humanitarian Relief partners. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Health & Humanitarian Relief activities	Required v. Optional
% change in hunger index score (pre/post program) (such as Fanta index, FIES)	Optional
% change in beneficiaries' well-being score (as measured by WHO-5 or similar)	Optional
% change in beneficiaries' self-rated health score	Optional
% change in beneficiaries' resilience score (as measured by the Brief Resilience Scale)	Optional

Health and Humanitarian Relief: Disaster Preparedness - Output Indicators

The following output indicators are required or optional for all Health and Humanitarian Relief partners who conduct work related to disaster preparedness. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Health & Humanitarian Relief activities	Required v. Optional
# of preparedness shipments or prepositioning	Required
# preparedness tools developed	Required
# preparedness tools accessed	Required

Health and Humanitarian Relief: Disaster Preparedness - Outcome Indicators

The following outcome indicators are required or optional for all Health and Humanitarian Relief partners who conduct work related to disaster preparedness. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a surveylink for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Health & Humanitarian Relief activities	Required v. Optional
Emergency preparedness plans in place or improved	Required
# agencies/organizations adopting collaborative/integrated protocols	Required
Results of third-party capacity assessments (e.g. OCHA)	Optional
% of agencies/organizations with activities/plans to address gender-based violence and trafficking	Optional
% of agencies/organizations with activities/plans to assist vulnerable migrants	Optional
% of agencies/organizations with rapid response teams organized, trained, and equipped with multi-hazard approach	Optional
# of individuals/ businesses/ communities that report they are prepared for disaster	Optional
# of individuals/ businesses/ communities that report they adopted disaster readiness practices	Optional

Health and Humanitarian Relief: Disaster Response - Output Indicators

The following output indicators are required or optional for all Health and Humanitarian Relief partners who conduct work related to disaster response. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Health & Humanitarian Relief activities	Required v. Optional
# crisis(es) supported	Required
# of disaster survivors receiving essential services	Required

Health and Humanitarian Relief: Disaster Response - Outcome Indicators

The following outcome indicators are required or optional for all Health and Humanitarian Relief partners who conduct work related to disaster response. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Health & Humanitarian Relief activities

Required v. Optional

Tell us about a business that reopened after a disaster with your support

Optional

Health and Humanitarian Relief: Disaster Preparedness and Response Training Activities - Output Indicators

The following output indicators are required or optional for all Health and Humanitarian Relief partners who conduct training activities related to disaster preparedness and response. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Health & Humanitarian Relief activities	Required v. Optional
# training sessions conducted	Required
Was this training virtual or in-person	Required
# of individuals received training	Required
Length of training provided (in hours)	Required
Training completion rate (%)	Required
Average Net Promoter Score for trainings	Optional

Health and Humanitarian Relief: Research & Innovation - Output & Outcome Indicators

The following output and outcome indicators are required or optional for all Health and Humanitarian Relief partners who do research/innovation. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Health and Humanitarian activities	Required v. Optional
Tell us about the innovation-focused work that TUPSF support enabled	Required
# points of access for better health outcomes that TUPSF support enabled	Required
Outcome indicators for Health and Humanitarian activities	Required v. Optional
# facilities/clinics providing immunization with functioning cold chain	Required
Description of the adoption or utilization of innovative solutions driven by TUPSF-supported work	Optional

Health and Humanitarian Relief: Anti-Trafficking Training - Output Indicators

The following output indicators are required or optional for all Health and Humanitarian Relief partners who conduct training activities related to anti-trafficking. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Health & Humanitarian Relief activities	Required v. Optional
# of individuals who received anti-trafficking training	Required
# of anti-trafficking sessions conducted	Required
Was the training virtual or in-person	Required
What is the length of training provided (in hours)	Required
Completion rate of the training for individuals (%)	Required
# of UPS drivers who received anti-trafficking training	Required

Health and Humanitarian Relief: Anti-Trafficking Training - Output Indicators Cont.

The following output indicators are required or for all Health and Humanitarian Relief partners who conduct training activities related to anti-trafficking. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Health & Humanitarian Relief activities	Required v. Optional
# of UPS drivers trained as anti-trafficking trainers	Required
# training sessions supported by UPS drivers and other drivers	Required
# individuals received training supported by UPS drivers	Required
# of individuals completed training due to UPS in-kind transportation.	Required
Average Net Promoter Score for anti-trafficking trainings	Optional

Health and Humanitarian Relief: Anti-Trafficking Training - Outcome Indicators

The following outcome indicators are required or optional for all Health and Humanitarian Relief partners who conduct training activities related to anti-trafficking. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Health & Humanitarian Relief activities	Required v. Optional
# of truckers who believe they are equipped to take action when they see suspected human trafficking (post-training survey)	Required
# of truckers who report that they have the situational awareness to identify human trafficking (post-training survey)	Required
# of truckers who understand the process for reporting suspected human trafficking (post-training survey)	Required
# of truckers that completed the post-training survey	Required

Health and Humanitarian Relief: Services to Survivors of Trafficking - Output Indicators

The following output indicators are required or optional for all Health and Humanitarian Relief partners who provide services to survivors of trafficking. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Health & Humanitarian Relief activities	Required v. Optional
# of survivors of trafficking receiving essential services	Required
# of survivors of trafficking participating in TUPSF-supported internships and other hands-on experiences	Required
# of survivors of trafficking receiving workforce readiness training	Required
# of training sessions conducted	Required
Was this training virtual or in-person	Required
Length of the training provided (in hours)	Required
Completion rate of the training for individuals (%)	Required
# of survivors of trafficking engaged in restorative/support services (such as individual counseling, group therapy)	Required
Average Net Promoter Score for workforce readiness trainings for survivors of trafficking	Optional
Average Net Promoter Score for restorative/support services for survivors of trafficking	Optional

Health and Humanitarian Relief: Services to Survivors of Trafficking - Outcome Indicators

The following outcome indicators are required or optional for all Health and Humanitarian Relief partners who provide services to survivors of trafficking. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Health & Humanitarian Relief activities	Required v. Optional
# of survivors of trafficking placed into a job by demographics and location	Required
% change in career readiness scores of survivors (as measured by the Career Resources Questionnaire)	Optional
# of survivors who transition to continuing education	Optional
% of survivor recidivism	Optional
Survivor mental health score post services (mental health index)	Optional

Organizational Capacity Building Indicators

The following outcome indicators are required based on the program activities funded. We are interested in understanding the impact of The UPS Foundation funding/support on partner organizations, in addition to the potential impact on beneficiaries. For each indicator below you will be asked to indicate to what extent The UPS Foundation support you received has helped you, with response options “not at all,” “very little,” “somewhat,” and “significantly.” Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Organizational Capacity Building Indicators	Required v. Optional
Increased capacity for fundraising and capital development	Required
Ability to hire and/or retain qualified staff in all positions	Required
Ability to provide on-the-job training and learning opportunities to enhance staffs' program-related skills	Required
Ability to evaluate impact and make data-driven decisions	Required
Ability to implement new or innovative programs and/or expand existing programs	Required
Ability to incorporate principles related to equity and justice into program design or delivery	Required
Ability to create and test more innovative solutions or products	Required
Gained the knowledge or ability to carry out more technical or specialized work or to carry that work out more effectively.	Required

Systems Change Indicators – Output Indicators

The following output indicators are required or optional for all Health and Humanitarian Relief partners who focus on systems change. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Systems Change	Required v. Optional
# of exponential lives impacted	Required

Systems Change Indicators – Outcome Indicators

The following outcome indicators are required or optional based on the program activities funded. We are interested in understanding the impact of The UPS Foundation funding/support on the primary levers of systems change. For each indicator below, you will be asked to indicate how much progress your TUPSF-supported work made in these areas, with response options “not at all,” “very little,” “somewhat,” and “significantly.” Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply report a result of “not at all.”

Systems Change Levers	Required v. Optional
Policies related to better meeting needs within marginalized communities populated by underserved and underrepresented people have been created, adopted, and implemented. Note that this may include legislation as well as administrative/organizational policies and rules.	Required
Improved practices (including collaboration/coalition building, anti-racist practices, etc.) have been created and implemented by actors within the system your work/program is addressing.	Required
Best practices (including collaboration/coalition building, anti-racist practices, etc.) have been adopted by a broader swath of organizations	Required
Organizations have increased access to funding, human capital, information, and other resources.	Required
Actors within the system you are addressing have greater quantity and quality of connections with one another.	Required
Members of targeted populations/groups have assumed formal and informal leadership and decision-making positions within organizations.	Required
Attitudes and mental models have been shifted to embrace equity, inclusion, and justice more fully.	Required

Systems Change Indicators – Outcome Indicators

The following indicators will be required if you answered “somewhat” or “significantly” to the initial questions about systems change. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Policies related to better meeting needs within marginalized communities populated by underserved and underrepresented people are created, adopted, and implemented.	Required v. Optional
# laws or pieces of legislation have been adopted, improved, and/or implemented through the contributions of your TUPSF support.	Required
Open-ended: How has your work contributed to or guided the policy change process for key systems change policies?	Required
Open-ended: How many administrative or organizational policies/rules have been adopted that your work contributed to?	Required
Open-ended: What other actors did you collaborate with in order to build momentum for policy reform?	Required
Open-ended: How did your targeted populations benefit from the policy changes your work supported?	Required
Best practices (including collaboration/coalition building, anti-racist practices, etc.) are adopted by a broader swath of organization	Required v. Optional
Open-ended: Describe the creation and implementation of your improved practice(s), why these were necessary, and how they were identified as appropriate solutions.	Required
Open-ended: How has your work contributed to the increased adoption of best practices and encouraged the independent replication of your idea? i.e. How have you shaped or built the field?	Required

Systems Change Indicators – Outcome Indicators

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Organizations have increased access to funding, human capital, information, and other resources.	Required v. Optional
Open-ended: How has your work facilitated the distribution of knowledge and information within the system?	Required
Open-ended: How has your work helped the reallocation of resources flow into the system?	Required
% change in funding/staffing/resources/knowledge that your work helped support	Required
Actors have greater quantity and quality of connections with one another.	Required v. Optional
Open-ended: How has your work facilitated connectivity between key actors in the system?	Required
Open-ended: How has your contribution helped the movements grow in participation, reach, voice, and platform?	Required
Self-rating: How connected your organization feels to the other actors working towards this system's change.	Required

Systems Change Indicators – Outcome Indicators

The following indicators will be required if you answered “somewhat” or “significantly” to the initial questions about systems change. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Members of underserved/underrepresented groups hold formal and informal leadership and decision-making positions within organizations.

Required v. Optional

Assess the level of participation (participation ladder) in your work by the following groups you serve.

Required

Rate to what extent members of underserved/underrepresented groups/community members are involved in specific tasks listed.

Required

Open-ended: How is your work including local community members in the decision-making?
Note: Decision-making/leadership can be both formal (e.g. elected positions) and informal (e.g. influence)

Required

Attitudes and mental models are shifted to embrace equity, inclusion, and justice more fully.

Required v. Optional

Open-ended: How has your work guided shifts in attitudes/mental models/public narratives and why does this matter? i.e., what levers are you pulling to try and influence the conversation more broadly and build demand?

Required



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**Signature or Community Partners
(Grants, In-kind Logistics and Delivery,
& On-Loan Executives)**

Equity and Economic Empowerment

**Measurement and Reporting
Requirements**

Meetings



There are no required MEL meetings for organizations receiving support at the Community Partner level.

Reports



Annual**

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Annual

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A very brief report on key indicators, such as lives impacted and number of trees planted.



At End of Support Period

Completion Report

Comprehensive report (via survey link) that discusses project accomplishments, impacts, stories, lessons learned and progress for output, outcome, and systems indicators.



Variable

Post-Completion Follow-up Submission (via survey link) seeking reporting on systems changes, outcomes, and output indicators one or more years post-completion (for large grantees) enables TUPSF to assess changes that may be longer term in nature.

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Geographic location of TUPSF support provided

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Specific stories of impact (individual- and/or community-level) highlighting the program's positive impacts for beneficiaries

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Feedback on TUPSF support

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The form will request the following information:

lives positively impacted

vaccines delivered in-kind to countries in need, by kind/type

disasters responded to by location

countries reached by location

trees planted by location

female and small business owners connected to the global economy/acquired job readiness skills (in general and through UPS's Women Exporters Program)

young adults provided equitable access to academic support for college/career enrichment opportunities

exponential lives positively impacted (systems change work only)

Completion Report Form Details

The completion form submission is required once at the end of the funding cycle. The template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

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Summary of impact of The UPS Foundation support on intended beneficiaries

Key activities and milestones completed during the reporting period

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The UPS Foundation-required output- and outcome-level indicators

Sustainable Development Goals supported

Lessons learned in terms of what worked well and what did not work as anticipated/what might you have done differently

Breakdown of spending by categories

Specific stories of impact (individual- and/or community-level) highlighting the program's positive impacts for beneficiaries

Feedback on TUPSF support

Equity and Economic Empowerment: All Partners - Output Indicators

The following output indicators are required or optional for all Equity and Economic Empowerment partners. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Equity and Economic Empowerment activities	Required v. Optional
Total # of lives impacted by location, low-to-moderate income, disability, and demographics	Required
Country(ies), states, priority market supported	Required
Unit cost/ average dollar cost of delivering a single unit of your service to an individual (\$USD)	Optional

Indicator Guidance: Lives Impacted

All partners of The UPS Foundation are asked to report on the indicator "total # lives impacted," which contributes to our goal of positively impacting one billion lives by 2040. We ask that partners report on the lives directly impacted in the work supported by The UPS Foundation partnership. As a general rule, you should not report on the total number of individuals in an affected geographic region, individuals served/trained through non-UPS funding, or media visits/views. We highly encourage you to review your methodology to avoid double counting; for example, if you count both the number of individuals trained and the number of individuals placed into jobs, please de-duplicate these numbers before reporting on the total lives impacted.

Examples of figures that are considered valid or invalid for inclusion in your reporting based on The UPS Foundation Program Activities are included in the [Appendix](#) to this guidebook.

For additional guidance or to discuss your proposed methodology for calculating lives impacted, please reach out to your UPS point of contact.

Equity and Economic Empowerment: All Partners - Outcome Indicators

The following outcome indicators are required or optional for all Equity and Economic Empowerment partners. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Equity and Economic Empowerment activities	Required v. Optional
% of women involved in making major household decisions	Required
% of women who report confidence in using financial products or services	Required
% change in beneficiaries' well-being score (as measured by WHO-5 or similar)	Required
Average change in financial well-being for beneficiaries within 12 mos. of program completion (pre-/post-intervention) (based on CFPB financial well-being score or equivalent)	Optional
% change in beneficiary wages [hourly/ monthly/ yearly] within 12 months of program completion (pre-/post-intervention) by demographics	Optional
% change in beneficiaries' resilience score (as measured by the Brief Resilience Scale)	Optional
% change in beneficiaries' perception of neighborhood safety	Optional

Equity and Economic Empowerment: Workforce and Leadership Development Activities - Output Indicators

The following output indicators are required or optional for all Equity and Economic Empowerment partners who conduct training and mentorship activities focused on workforce and/or leadership development. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Equity and Economic Empowerment activities	Required v. Optional
# of individuals who received trainings (disaggregated by workforce readiness, leadership, other)	Required
# training sessions conducted	Required
Completion rate of trainings (%)	Required
Length of training provided (in hours)	Required
Was the training virtual or in person	Required
# individuals who participated in mentorship	Required
# of individuals participating in TUPSF-supported internships and other hands-on experiences	Required
Average Net Promoter Score (NPS) for trainings	Optional
Average Net Promoter Score (NPS) for mentorship	Optional
# of new training modules developed	Optional

Equity and Economic Empowerment: Workforce and Leadership Development Activities - Outcome Indicators

The following outcome indicators are required or optional for all Equity and Economic Empowerment partners who conduct training and mentorship activities focused on workforce and/or leadership development. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Equity and Economic Empowerment activities	Required v. Optional
% change in leadership self-efficacy (pre-/post program)	Required
# of supported individuals who transition to employment/further education	Required
# of workers placed into a job by demographics and location	Required
# of individuals placed into a part-time job	Required
# of individuals placed into a full-time job	Required
# of individuals hired who were previously unemployed	Required

Equity and Economic Empowerment: Workforce and Leadership Development Activities - Outcome Indicators Cont.

The following outcome indicators are required or optional for all Equity and Economic Empowerment partners who conduct training and mentorship activities focused on workforce and/or leadership development. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Equity and Economic Empowerment activities	Required v. Optional
# of supported individuals placed into a job that provides health insurance benefits	Required
# of supported individuals who retain their job for 6 months or more after starting	Optional
# of supported individuals who advanced their career within 12 months of program completion	Optional
# of supported individuals who transitioned from one job to another as a result of program participation	Optional
# of supported individuals who report they are able to cover their rent/ mortgage with their current income	Optional
# of individuals who report greater confidence in their job-related skills or abilities	Optional
% change in career readiness scores (as measured by the Career Resources Questionnaire)	Optional

Equity and Economic Empowerment: Education Activities – Output & Outcome Indicators

The following output and outcome indicators are required or optional for all Equity and Economic Empowerment partners who conduct education-focused activities for youth aged 14-24. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Equity and Economic Empowerment activities	Required v. Optional
Total # participants, by demographics	Required
Total # individuals receiving support services	Required
Average Net Promoter Score (NPS) for educational programming	Optional

Outcome indicators for Equity and Economic Empowerment activities	Required v. Optional
Graduation rate for participants	Required
# of supported individuals who transition to employment/further education	Required
% change in career readiness scores (as measured by t.he Career Resources Questionnaire)	Optional

Equity and Economic Empowerment: SME/SMB - Output Indicators

The following output indicators are required or optional for all Equity and Economic Empowerment partners who distribute microloans and provide SME/SMB training. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Equity and Economic Empowerment activities	Required v. Optional
# of businesses supported, by demographics of business owner	Required
Total # of employees of small businesses supported	Required
Average revenue (\$USD) of small businesses supported	Required
# and dollar value of microloans, small business loans, and seed funding distributed	Required
# of recipients of microloans, small business loans, and seed funding by gender	Required
# and dollar value of microloans, small business loans, and seed funding distributed to women owned businesses	Required
# of microloans, small business loans, and seed funding by purpose	Optional
# of businesses supported by industry	Optional
# of small businesses supported with e-commerce business model	Optional
Average Net Promoter Score (NPS) for microloan, small business loan, and seed funding program	Optional

Equity and Economic Empowerment: SME/SMB - Output Indicators Cont.

The following output indicators are required or optional for all Equity and Economic Empowerment partners who distribute microloans and provide SME/SMB training. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Equity and Economic Empowerment activities	Required v. Optional
# of individuals who received trainings, by gender	Required
# training sessions conducted	Required
Was this training virtual or in person	Required
Length of training (in hours)	Required
Training completion rate (%)	Required
Total hours of advisory services/training/capacity building activities/technical assistance provided to small businesses	Optional
# of businesses supported by industry	Optional
# of products/services developed/implemented in coordination with government bodies	Optional
# of products/ services developed or new partnerships established to improve resource flows to women entrepreneurs	Optional
Average Net Promoter Score (NPS) for trainings	Optional

Equity and Economic Empowerment: SME/SMB - Outcome Indicators

The following outcome indicators are required or optional for all Equity and Economic Empowerment partners who distribute microloans and provide SME/SMB training. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Equity and Economic Empowerment activities	Required v. Optional
% change in entrepreneurial self-efficacy (pre/post program), by gender	Required
# of businesses that scaled up as a result of TUPSF support by business owner demographics	Required
# of businesses that reported increased revenue based on the support provided by TUPSF	Required
# of jobs created	Required
# of female small business owners in your program that are connected to the global economy	Required
# of micro businesses that scaled to small businesses	Optional

Equity and Economic Empowerment: Advocacy - Output Indicators

The following output indicators are required or optional for all Equity and Economic Empowerment partners who focus on advocacy. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Equity and Economic Empowerment activities	Required v. Optional
Explanation of how key issue area(s) were identified and defined	Required
# of organizations attending meetings/assemblies around issue(s) of focus	Required
# of participants at advocacy events	Required
# of individuals targeted with information about issue(s) of focus	Optional

Equity and Economic Empowerment: Advocacy - Outcome Indicators

The following outcome indicators are required or optional for all Equity and Economic Empowerment partners who focus on advocacy. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Equity and Economic Empowerment activities	Required v. Optional
# of organizations actively involved in coalition around issue of focus	Required
# of new champions/advocates recruited, including new constituencies represented	Required
# of elected officials who publicly support the campaign	Required
# of litigation in favor of the program's position	Required
% of target audience who believe that the issue is important to them	Optional
# of individuals providing donations to support the initiative	Optional
% of desired actions taken by government agency(ies)	Optional

Equity and Economic Empowerment: Research & Innovation - Output & Outcome Indicators

The following output and outcome indicators are required or optional for all Equity and Economic Empowerment partners who do research/innovation. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Equity and Economic Empowerment activities	Required v. Optional
Tell us about the innovation-focused work that TUPSF support enabled	Required
Outcome indicators for Equity and Economic Empowerment activities	Required v. Optional
Description of the adoption or utilization of innovative solutions driven by TUPSF-supported work	Optional

Organizational Capacity Building Indicators

The following outcome indicators are required based on the program activities funded. We are interested in understanding the impact of The UPS Foundation funding/support on partner organizations, in addition to the potential impact on beneficiaries. For each indicator below you will be asked to indicate to what extent The UPS Foundation support you received has helped you, with response options “not at all,” “very little,” “somewhat,” and “significantly.” Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Organizational Capacity Building Indicators	Required v. Optional
Increased capacity for fundraising and capital development	Required
Ability to hire and/or retain qualified staff in all positions	Required
Ability to provide on-the-job training and learning opportunities to enhance staffs' program-related skills	Required
Ability to evaluate impact and make data-driven decisions	Required
Ability to implement new or innovative programs and/or expand existing programs	Required
Ability to incorporate principles related to equity and justice into program design or delivery	Required
Ability to create and test more innovative solutions or products	Required
Gained the knowledge or ability to carry out more technical or specialized work or to carry that work out more effectively.	Required

Systems Change Indicators – Output Indicators

The following output indicators are required or optional for all partners who focus on systems change. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Systems Change	Required v. Optional
# of exponential lives impacted	Required

Systems Change Indicators – Outcome Indicators

The following outcome indicators are required or optional based on the program activities funded. We are interested in understanding the impact of The UPS Foundation funding/support on the primary levers of systems change. For each indicator below, you will be asked to indicate how much progress your TUPSF-supported work made in these areas, with response options “not at all,” “very little,” “somewhat,” and “significantly.” Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply report a result of “not at all.”

Systems Change Levers	Required v. Optional
Policies related to better meeting needs within marginalized communities populated by underserved and underrepresented people have been created, adopted, and implemented. Note that this may include legislation as well as administrative/organizational policies and rules.	Required
Improved practices (including collaboration/coalition building, anti-racist practices, etc.) have been created and implemented by actors within the system your work/program is addressing.	Required
Best practices (including collaboration/coalition building, anti-racist practices, etc.) have been adopted by a broader swath of organizations	Required
Organizations have increased access to funding, human capital, information, and other resources.	Required
Actors within the system you are addressing have greater quantity and quality of connections with one another.	Required
Members of targeted populations/groups have assumed formal and informal leadership and decision-making positions within organizations.	Required
Attitudes and mental models have been shifted to embrace equity, inclusion, and justice more fully.	Required

Systems Change Indicators – Outcome Indicators

The following indicators will be required if you answered “somewhat” or “significantly” to the initial questions about systems change.

Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Policies related to better meeting needs within marginalized communities populated by underserved and underrepresented people are created, adopted, and implemented.	Required v. Optional
# laws or pieces of legislation have been adopted, improved, and/or implemented through the contributions of your TUPSF support.	Required
Open-ended: How has your work contributed to or guided the policy change process for key systems change policies?	Required
Open-ended: How many administrative or organizational policies/rules have been adopted that your work contributed to?	Required
Open-ended: What other actors did you collaborate with in order to build momentum for policy reform?	Required
Open-ended: How did your targeted populations benefit from the policy changes your work supported?	Required
Best practices (including collaboration/coalition building, anti-racist practices, etc.) are adopted by a broader swath of organization	Required v. Optional
Open-ended: Describe the creation and implementation of your improved practice(s), why these were necessary, and how they were identified as appropriate solutions.	Required
Open-ended: How has your work contributed to the increased adoption of best practices and encouraged the independent replication of your idea? i.e. How have you shaped or built the field?	Required

Systems Change Indicators – Outcome Indicators

The following indicators will be required if you answered “somewhat” or “significantly” to the initial questions about systems change. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Organizations have increased access to funding, human capital, information, and other resources.	Required v. Optional
Open-ended: How has your work facilitated the distribution of knowledge and information within the system?	Required
Open-ended: How has your work helped the reallocation of resources flow into the system?	Required
% change in funding/staffing/resources/knowledge that your work helped support	Required
Actors have greater quantity and quality of connections with one another.	Required v. Optional
Open-ended: How has your work facilitated connectivity between key actors in the system?	Required
Open-ended: How has your contribution helped the movements grow in participation, reach, voice, and platform?	Required
Self-rating: How connected your organization feels to the other actors working towards this system's change.	Required

Systems Change Indicators – Outcome Indicators

The following indicators will be required if you answered “somewhat” or “significantly” to the initial questions about systems change. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Members of underserved/underrepresented groups hold formal and informal leadership and decision-making positions within organizations.	Required v. Optional
Assess the level of participation (participation ladder) in your work by the following groups you serve.	Required
Rate to what extent members of underserved/underrepresented groups/community members are involved in specific tasks listed.	Required
Open-ended: How is your work including local community members in the decision-making? Note: Decision-making/leadership can be both formal (e.g. elected positions) and informal (e.g. influence)	Required
Attitudes and mental models are shifted to embrace equity, inclusion, and justice more fully.	Required v. Optional
Open-ended: How has your work guided shifts in attitudes/mental models/public narratives and why does this matter? i.e., what levers are you pulling to try and influence the conversation more broadly and build demand?	Required



If you have questions or concerns about your Measurement and reporting requirements, please reach out directly to your UPS point of contact.

You have reached the end of this section of the guidebook. If you receive multiple forms of support from The UPS Foundation, please [return to the navigation page](#) to access the other section(s) of the guidebook relevant to your organization.



**Signature or Community Partners
(Grants, In-kind Logistics and Delivery,
& On-Loan Executives)**

**Local Community Engagement
Measurement and Reporting
Requirements**

Meetings



There are no required MEL meetings for organizations receiving support at the Community Partner level.

Reports



Annual**

Partnership Status and Indicator Update

Concise update (via survey link) on key activities completed, progress against each of the grant goals, grant spending (budget vs. actual), lessons learned, risks/challenges, and key accomplishments.



Annual

GRI Indicator Report*

A very brief report on key indicators, such as lives impacted and number of trees planted.



At End of Support Period

Completion Report

Comprehensive report (via survey link) that discusses project accomplishments, impacts, stories, lessons learned and progress for output, outcome, and systems indicators.



Variable

Post-Completion Follow-up Submission (via survey link) seeking reporting on systems changes, outcomes, and output indicators one or more years post-completion (for large grantees) enables TUPSF to assess changes that may be longer term in nature.

*The GRI Indicator Report is only required for grantees receiving \$15,000+ in support from TUPSF.

**Annual reports will only be required if funds are provided for multiple years.

[Click here to return to the navigation page](#)

Partnership Status and Indicator Update Form Details

Signature and Community Partners with multi-year funding are required to submit a partnership status and indicator update form on an annual basis. The form template will be shared via survey link in an email from The UPS Foundation at least one month before the due date. This report is not required for single-year funding cycles.

The UPS Foundation requires reporting on specific output- and outcome-level indicators to enable aggregation at the portfolio level. However, The UPS Foundation also values the unique impact of each partner so includes room for partners to share any additional indicators that help to communicate their impact.

The form will request the following information:

Geographic location of TUPSF support provided

Major accomplishments, milestones, and activities during the support period

Activities and milestones anticipated in the next 3-6 months

Progress toward short-term goals

Program risks and lessons learned

Impact of The UPS Foundation support on organizational capacity

Impact of The UPS Foundation support on intended beneficiaries

The UPS Foundation-required output- and outcome-level indicators

Specific stories of impact (individual- and/or community-level) highlighting the program's positive impacts for beneficiaries

Details on funding utilization/budget

Feedback on TUPSF support

Partners who receive funding of \$15,000 or more are required to submit a GRI Indicator Report on an annual basis. This very brief report focuses on a calendar year (January 1 - December 31) and is due mid-December. The form template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

The form will request the following information:

lives positively impacted

vaccines delivered in-kind to countries in need, by kind/type

disasters responded to by location

countries reached by location

trees planted by location

female and small business owners connected to the global economy/acquired job readiness skills (in general and through UPS's Women Exporters Program)

young adults provided equitable access to academic support for college/career enrichment opportunities

exponential lives positively impacted (systems change work only)

Completion Report Form Details

The completion form submission is required once at the end of the funding cycle. The template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

The UPS Foundation requires reporting on specific output- and outcome-level indicators to enable aggregation at the portfolio level. However, The UPS Foundation also values the unique impact of each partner so includes room for partners to share any additional indicators that help to communicate their impact.

The form will request the following information:

Summary of impact of The UPS Foundation support on intended beneficiaries

Key activities and milestones completed during the reporting period

Progress toward goals of TUPSF support

Organizational capacity building indicators and stories of impact for the supported organization

The UPS Foundation-required output- and outcome-level indicators

Sustainable Development Goals supported

Lessons learned in terms of what worked well and what did not work as anticipated/what might you have done differently

Breakdown of spending by categories

Specific stories of impact (individual- and/or community-level) highlighting the program's positive impacts for beneficiaries

Feedback on TUPSF support

Local Community Engagement - Output Indicators

The following output indicators are required or optional for all Local Community Engagement partners. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Local Community Engagement activities	Required v. Optional
Total # of lives impacted by location, low-to-moderate income, disability, and demographics	Required
Country(ies), states, priority market supported	Required
Unit cost/ average dollar cost of delivering a single unit of your service to an individual (\$USD)	Optional

Indicator Guidance: Lives Impacted

All partners of The UPS Foundation are asked to report on the indicator "total # lives impacted," which contributes to our goal of positively impacting one billion lives by 2040. We ask that partners report on the lives directly impacted in the work supported by The UPS Foundation partnership. As a general rule, you should not report on the total number of individuals in an affected geographic region, individuals served/trained through non-UPS funding, or media visits/views. We highly encourage you to review your methodology to avoid double counting; for example, if you count both the number of individuals trained and the number of individuals placed into jobs, please de-duplicate these numbers before reporting on the total lives impacted.

Examples of figures that are considered valid or invalid for inclusion in your reporting based on The UPS Foundation Program Activities are included in the [Appendix](#) to this guidebook.

For additional guidance or to discuss your proposed methodology for calculating lives impacted, please reach out to your UPS point of contact.

Local Community Engagement: Volunteerism - Output & Outcome Indicators

The following output and outcome indicators are required or optional for all partners who engage with UPS-sponsored volunteer events. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Volunteer Activities	Required v. Optional
# of UPS employee and friend/family volunteers	Required
Total # of lives impacted as a result of volunteer activities (e.g. individuals receiving meals, lawn care assistance, etc.)	Required
Location(s) of volunteer activities (country; state; city <u>and</u> whether location is considered underserved or predominantly Black)	Required
Media stories related to UPS volunteerism with your organization	Optional

Outcome indicators for Volunteer Activities	Required v. Optional
Stories of impact from volunteer event (for individuals and/or communities)	Required
Satisfaction with volunteer support	Required
Open-ended: Briefly describe your experience with TUPSF volunteer support	Required

Organizational Capacity Building Indicators

The following outcome indicators are required based on the program activities funded. We are interested in understanding the impact of The UPS Foundation funding/support on partner organizations, in addition to the potential impact on beneficiaries. For each indicator below you will be asked to indicate to what extent The UPS Foundation support you received has helped you, with response options “not at all,” “very little,” “somewhat,” and “significantly.” Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Organizational Capacity Building Indicators	Required v. Optional
Increased capacity for fundraising and capital development	Required
Ability to hire and/or retain qualified staff in all positions	Required
Ability to provide on-the-job training and learning opportunities to enhance staffs' program-related skills	Required
Ability to evaluate impact and make data-driven decisions	Required
Ability to implement new or innovative programs and/or expand existing programs	Required
Ability to incorporate principles related to equity and justice into program design or delivery	Required
Ability to create and test more innovative solutions or products	Required
Gained the knowledge or ability to carry out more technical or specialized work or to carry that work out more effectively.	Required



If you have questions or concerns about your Measurement and reporting requirements, please reach out directly to your UPS point of contact.

You have reached the end of this section of the guidebook. If you receive multiple forms of support from The UPS Foundation, please [return to the navigation page](#) to access the other section(s) of the guidebook relevant to your organization.



**Signature or Community Partners
(Grants, In-kind Logistics and Delivery,
& On-Loan Executives)**

Planet Protection

**Measurement and Reporting
Requirements**

Meetings



There are no required MEL meetings for organizations receiving support at the Community Partner level.

Reports



Annual**

Partnership Status and Indicator Update

Concise update (via survey link) on key activities completed, progress against each of the grant goals, grant spending (budget vs. actual), lessons learned, risks/challenges, and key accomplishments.



Annual

GRI Indicator Report*

A very brief report on key indicators, such as lives impacted and number of trees planted.



At End of Support Period

Completion Report

Comprehensive report (via survey link) that discusses project accomplishments, impacts, stories, lessons learned and progress for output, outcome, and systems indicators.



Variable

Post-Completion Follow-up Submission (via survey link) seeking reporting on systems changes, outcomes, and output indicators one or more years post-completion (for large grantees) enables TUPSF to assess changes that may be longer term in nature.

*The GRI Indicator Report is only required for grantees receiving \$15,000+ in support from TUPSF.

**Annual reports will only be required if funds are provided for multiple years.

[Click here to return to the navigation page](#)

Partnership Status and Indicator Update Form Details

Signature and Community Partners with multi-year funding are required to submit a partnership status and indicator update form on an annual basis. The form template will be shared via survey link in an email from The UPS Foundation at least one month before the due date. This report is not required for single-year funding cycles.

The UPS Foundation requires reporting on specific output- and outcome-level indicators to enable aggregation at the portfolio level. However, The UPS Foundation also values the unique impact of each partner so includes room for partners to share any additional indicators that help to communicate their impact.

The form will request the following information:

Geographic location of TUPSF support provided

Major accomplishments, milestones, and activities during the support period

Activities and milestones anticipated in the next 3-6 months

Progress toward short-term goals

Program risks and lessons learned

Impact of The UPS Foundation support on organizational capacity

Impact of The UPS Foundation support on intended beneficiaries

The UPS Foundation-required output- and outcome-level indicators

Specific stories of impact (individual- and/or community-level) highlighting the program's positive impacts for beneficiaries

Details on funding utilization/budget

Feedback on TUPSF support

Partners who receive funding of \$15,000 or more are required to submit a GRI Indicator Report on an annual basis. This very brief report focuses on a calendar year (January 1 - December 31) and is due mid-December. The form template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

The form will request the following information:

lives positively impacted

vaccines delivered in-kind to countries in need, by kind/type

disasters responded to by location

countries reached by location

trees planted by location

female and small business owners connected to the global economy/acquired job readiness skills (in general and through UPS's Women Exporters Program)

young adults provided equitable access to academic support for college/career enrichment opportunities

exponential lives positively impacted (systems change work only)

Completion Report Form Details

The completion form submission is required once at the end of the funding cycle. The template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

The UPS Foundation requires reporting on specific output- and outcome-level indicators to enable aggregation at the portfolio level. However, The UPS Foundation also values the unique impact of each partner so includes room for partners to share any additional indicators that help to communicate their impact.

The form will request the following information:

Summary of impact of The UPS Foundation support on intended beneficiaries

Key activities and milestones completed during the reporting period

Progress toward goals of TUPSF support

Organizational capacity building indicators and stories of impact for the supported organization

The UPS Foundation-required output- and outcome-level indicators

Sustainable Development Goals supported

Lessons learned in terms of what worked well and what did not work as anticipated/what might you have done differently

Breakdown of spending by categories

Specific stories of impact (individual- and/or community-level) highlighting the program's positive impacts for beneficiaries

Feedback on TUPSF support

Planet Protection: All Partners - Output Indicators

The following output indicators are required or optional for all Planet Protect partners. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Planet Protection activities	Required v. Optional
Total # lives impacted, by location, low-to-moderate income, disability, and demographics	Required
Country(ies), states, priority market supported	Required
# trees planted, by type (e.g. lumber/ fruit) and location	Required
# trees planted, by target environment (e.g. schools; watershed/riparian restoration; forest fire restoration; urban areas, communities affected by disaster)	Optional
# agroforestry projects funded, by location	Optional
Unit cost/ average dollar cost of delivering a single unit of your service to an individual (\$USD)	Optional

Indicator Guidance: Lives Impacted

All partners of The UPS Foundation are asked to report on the indicator "total # lives impacted," which contributes to our goal of positively impacting one billion lives by 2040. We ask that partners report on the lives directly impacted in the work supported by The UPS Foundation partnership. As a general rule, you should not report on the total number of individuals in an affected geographic region, individuals served/trained through non-UPS funding, or media visits/views. We highly encourage you to review your methodology to avoid double counting; for example, if you count both the number of individuals trained and the number of individuals placed into jobs, please de-duplicate these numbers before reporting on the total lives impacted.

Examples of figures that are considered valid or invalid for inclusion in your reporting based on The UPS Foundation Program Activities are included in the [Appendix](#) to this guidebook.

For additional guidance or to discuss your proposed methodology for calculating lives impacted, please reach out to your UPS point of contact.

Planet Protection: All Partners - Outcome Indicators

The following outcome indicators are required or optional for all Planet Protect partners. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Planet Protection activities	Required v. Optional
Average survival rate of trees planted	Required
# of individuals with increased income (self-reported) by demographics	Required
Stories of impact by city/country describing the benefit of tree planting (e.g. providing shade in a schoolyard)	Required
# acres/hectars of land preserved or restored (i.e., bio-diversity)	Optional
# acres/hectars of land improved or maintained (i.e., cleaning up trash/weeding)	Optional
# farmers implementing land and forest management practices	Optional

Planet Protection: Training Activities - Output Indicators

The following output indicators are required or optional for all Planet Protect partners who do training activities. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Planet Protection activities	Required v. Optional
# training sessions conducted	Required
Was this training virtual or in-person	Required
Training completion rate (%)	Required
What is the length of the training provided (in hours)	Required
# of individuals received training	Required
Average Net Promoter Score (NPS) for training sessions	Optional

Planet Protection: Research & Innovation - Output & Outcome Indicators

The following output and outcome indicators are required or optional for all Planet Protection partners who do research/innovation. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Planet Protection activities	Required v. Optional
Tell us about the innovation-focused work that TUPSF support enabled	Required
Outcome indicators for Planet Protection activities	Required v. Optional
Description of the adoption or utilization of innovative solutions driven by TUPSF-supported work	Optional

Planet Protection: Hiring/Job Creation Related to Tree Planting - Output & Outcome Indicators

The following output and outcome indicators are required or optional for all Planet Protect partners who do hiring/job creation related to tree planting. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Planet Protection activities	Required v. Optional
# of jobs created/supported for tree planting initiatives by demographics	Required
# of individuals hired for tree planting initiatives by demographics	Optional
# of individuals hired for tree planting initiatives who were previously unemployed by demographics	Optional
# of individuals hired for tree planting initiatives in long-term positions (without a discrete end date) by demographics	Optional

Outcome indicators for Planet Protection activities	Required v. Optional
Average change in financial well-being for beneficiaries within 12 months of program completion (pre-/post-intervention) (based on CFPB financial well-being score or equivalent)	Optional

Organizational Capacity Building Indicators

The following outcome indicators are required based on the program activities funded. We are interested in understanding the impact of The UPS Foundation funding/support on partner organizations, in addition to the potential impact on beneficiaries. For each indicator below you will be asked to indicate to what extent The UPS Foundation support you received has helped you, with response options “not at all,” “very little,” “somewhat,” and “significantly.” Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Organizational Capacity Building Indicators	Required v. Optional
Increased capacity for fundraising and capital development	Required
Ability to hire and/or retain qualified staff in all positions	Required
Ability to provide on-the-job training and learning opportunities to enhance staffs' program-related skills	Required
Ability to evaluate impact and make data-driven decisions	Required
Ability to implement new or innovative programs and/or expand existing programs	Required
Ability to incorporate principles related to equity and justice into program design or delivery	Required
Ability to create and test more innovative solutions or products	Required
Gained the knowledge or ability to carry out more technical or specialized work or to carry that work out more effectively.	Required

Systems Change Indicators – Output Indicators

The following output indicators are required or optional for all partners who focus on systems change. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Systems Change	Required v. Optional
# of exponential lives impacted	Required

Systems Change Indicators – Outcome Indicators

The following outcome indicators are required or optional based on the program activities funded. We are interested in understanding the impact of The UPS Foundation funding/support on the primary levers of systems change. For each indicator below, you will be asked to indicate how much progress your TUPSF-supported work made in these areas, with response options “not at all,” “very little,” “somewhat,” and “significantly.” Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply report a result of “not at all.”

Systems Change Levers	Required v. Optional
Policies related to better meeting needs within marginalized communities populated by underserved and underrepresented people have been created, adopted, and implemented. Note that this may include legislation as well as administrative/organizational policies and rules.	Required
Improved practices (including collaboration/coalition building, anti-racist practices, etc.) have been created and implemented by actors within the system your work/program is addressing.	Required
Best practices (including collaboration/coalition building, anti-racist practices, etc.) have been adopted by a broader swath of organizations	Required
Organizations have increased access to funding, human capital, information, and other resources.	Required
Actors within the system you are addressing have greater quantity and quality of connections with one another.	Required
Members of targeted populations/groups have assumed formal and informal leadership and decision-making positions within organizations.	Required
Attitudes and mental models have been shifted to embrace equity, inclusion, and justice more fully.	Required

Systems Change Indicators – Outcome Indicators

The following indicators will be required if you answered “somewhat” or “significantly” to the initial questions about systems change.

Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Policies related to better meeting needs within marginalized communities populated by underserved and underrepresented people are created, adopted, and implemented.	Required v. Optional
# laws or pieces of legislation have been adopted, improved, and/or implemented through the contributions of your TUPSF support.	Required
Open-ended: How has your work contributed to or guided the policy change process for key systems change policies?	Required
Open-ended: How many administrative or organizational policies/rules have been adopted that your work contributed to?	Required
Open-ended: What other actors did you collaborate with in order to build momentum for policy reform?	Required
Open-ended: How did your targeted populations benefit from the policy changes your work supported?	Required
Best practices (including collaboration/coalition building, anti-racist practices, etc.) are adopted by a broader swath of organization	Required v. Optional
Scale of best practice adoption (# people/organizations)	Required
Open-ended: Describe the creation and implementation of your improved practice(s), why these were necessary, and how they were identified as appropriate solutions.	Required
Open-ended: How has your work contributed to the increased adoption of best practices and encouraged the independent replication of your idea? i.e. How have you shaped or built the field?	Required

Systems Change Indicators – Outcome Indicators

The following indicators will be required if you answered “somewhat” or “significantly” to the initial questions about systems change. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Organizations have increased access to funding, human capital, information, and other resources.	Required v. Optional
Open-ended: How has your work facilitated the distribution of knowledge and information within the system?	Required
Open-ended: How has your work helped the reallocation of resources flow into the system?	Required
% change in funding/staffing/resources/knowledge that your work helped support	Required
Actors have greater quantity and quality of connections with one another.	Required v. Optional
Open-ended: How has your work facilitated connectivity between key actors in the system?	Required
Open-ended: How has your contribution helped the movements grow in participation, reach, voice, and platform?	Required
Self-rating: How connected your organization feels to the other actors working towards this system's change.	Required

Systems Change Indicators – Outcome Indicators

The following indicators will be required if you answered “somewhat” or “significantly” to the initial questions about systems change. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Members of underserved/underrepresented groups hold formal and informal leadership and decision-making positions within organizations.

Required v. Optional

Assess the level of participation (participation ladder) in your work by the following groups you serve.

Required

Rate to what extent members of underserved/underrepresented groups/community members are involved in specific tasks listed.

Required

Open-ended: How is your work including local community members in the decision-making?
Note: Decision-making/leadership can be both formal (e.g. elected positions) and informal (e.g. influence)

Required

Attitudes and mental models are shifted to embrace equity, inclusion, and justice more fully.

Required v. Optional

Open-ended: How has your work guided shifts in attitudes/mental models/public narratives and why does this matter? i.e., what levers are you pulling to try and influence the conversation more broadly and build demand?

Required



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Corporate Partners
(Grants, In-kind Logistics and Delivery,
& On-Loan Executives)

Health and Humanitarian Relief

**Measurement and Reporting
Requirements**

Measurement & Reporting Requirement Descriptions

Meetings

At Start of Partnership



MEL Kick-Off Meeting

Meeting (virtual) to finalize reporting requirements, required indicators, and formats and discuss any concerns or anticipated challenges. May require multiple meetings for large grants.



Bi-Annual

Partnership Status Meetings

This meeting (virtual) will be an opportunity to check in with The UPS Foundation team on grant progress, accomplishments, upcoming project activities, and challenges faced. No slides are required. The project status update form submission will be the basis for the discussion. Questions that arise mid-cycle from both sides will be saved for this meeting.



At End of Support Period

Completion Meeting

This meeting provides a final opportunity for TUPSF and grantees to connect to discuss achievements, lessons learned, and best practices.

Reports

Bi-Annual

Partnership Status and Indicator Update

Concise update (via survey link) on key activities completed, progress against each of the grant goals, grant spending (budget vs. actual), lessons learned, risks/challenges, and key accomplishments.



Annual

GRI Indicator Report*

A very brief report on key indicators, such as lives impacted and number of trees planted.



At End of Support Period

Completion Report

Comprehensive report (via survey link) that discusses project accomplishments, impacts, stories, lessons learned and progress for output, outcome, and systems indicators.



Variable

Post-Completion Follow-up

Submission (via survey link) seeking reporting on systems changes, outcomes, and output indicators one or more years post-completion (for large grantees) enables TUPSF to assess changes that may be longer term in nature.

Other

Variable

Third-Party Impact Evaluation

Third-party evaluations provide robust and objective insights into the processes and achievements of projects, including providing credible evidence of *what worked*, *by how much*, and *why*.



Partnership Status and Indicator Update Form Details

Corporate partners are required to submit a partnership status and indicator update form on a bi-annual basis. The form template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

The UPS Foundation requires reporting on specific output- and outcome-level indicators to enable aggregation at the portfolio level. However, The UPS Foundation also values the unique impact of each partner so includes room for partners to share any additional indicators that help to communicate their impact.

The form will request the following information:

Geographic location of TUPSF support provided

Major accomplishments, milestones, and activities during the support period

Activities and milestones anticipated in the next 3-6 months

Progress toward short-term goals

Program risks and lessons learned

Impact of The UPS Foundation support on organizational capacity

Impact of The UPS Foundation support on intended beneficiaries

The UPS Foundation-required output- and outcome-level indicators

Specific stories of impact (individual- and/or community-level) highlighting the program's positive impacts for beneficiaries

Details on funding utilization/budget

Feedback on TUPSF support

GRI Indicator Report

Partners who receive funding of \$15,000 or more are required to submit a GRI Indicator Report on an annual basis. This very brief report focuses on a calendar year (January 1 - December 31) and is due mid-December. The form template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

The form will request the following information:

lives positively impacted

vaccines delivered in-kind to countries in need, by kind/type

disasters responded to by location

countries reached by location

trees planted by location

female and small business owners connected to the global economy/acquired job readiness skills (in general and through UPS's Women Exporters Program)

young adults provided equitable access to academic support for college/career enrichment opportunities

exponential lives positively impacted (systems change work only)

Completion Report Form Details

The completion form submission is required once at the end of the funding cycle. The template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

The UPS Foundation requires reporting on specific output- and outcome-level indicators to enable aggregation at the portfolio level. However, The UPS Foundation also values the unique impact of each partner so includes room for partners to share any additional indicators that help to communicate their impact.

The form will request the following information:

Summary of impact of The UPS Foundation support on intended beneficiaries

Key activities and milestones completed during the reporting period

Progress toward goals of TUPSF support

Organizational capacity building indicators and stories of impact for the supported organization

The UPS Foundation-required output- and outcome-level indicators

Sustainable Development Goals supported

Lessons learned in terms of what worked well and what did not work as anticipated/what might you have done differently

Breakdown of spending by categories

Specific stories of impact (individual- and/or community-level) highlighting the program's positive impacts for beneficiaries

Feedback on TUPSF support

Health and Humanitarian Relief: All Partners - Output Indicators

The following output indicators are required or optional for all Health and Humanitarian Relief partners. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Health & Humanitarian Relief activities	Required v. Optional
Total # lives impacted by direct support or other organizations, by location, low-to-moderate income, disability, and demographics	Required
Country(ies), states, priority markets supported	Required
# deliveries completed	Required
# supplies delivered by supply type (food; vaccines (by type); medicine; other)	Required
# vaccines and medicines delivered by ministries of health and other organizations due to the logistics or supply chain optimization UPS put in place (by type) (ex: ultra cold freezers)	Optional
Unit cost/ average dollar cost of delivering a single unit of your service to an individual (\$USD)	Optional

Indicator Guidance: Lives Impacted

All partners of The UPS Foundation are asked to report on the indicator "total # lives impacted," which contributes to our goal of positively impacting one billion lives by 2040. We ask that partners report on the lives directly impacted in the work supported by The UPS Foundation partnership. As a general rule, you should not report on the total number of individuals in an affected geographic region, individuals served/trained through non-UPS funding, or media visits/views. We highly encourage you to review your methodology to avoid double counting; for example, if you count both the number of individuals trained and the number of individuals placed into jobs, please de-duplicate these numbers before reporting on the total lives impacted.

Examples of figures that are considered valid or invalid for inclusion in your reporting based on The UPS Foundation Program Activities are included in the [Appendix](#) to this guidebook.

For additional guidance or to discuss your proposed methodology for calculating lives impacted, please reach out to your UPS point of contact.

Health and Humanitarian Relief: All Partner - Outcome Indicators

The following outcome indicators are required or optional for all Health and Humanitarian Relief partners. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Health & Humanitarian Relief activities	Required v. Optional
% change in hunger index score (pre/post program) (such as Fanta index, FIES)	Optional
% change in beneficiaries' well-being score (as measured by WHO-5 or similar)	Optional
% change in beneficiaries' self-rated health score	Optional
% change in beneficiaries' resilience score (as measured by the Brief Resilience Scale)	Optional

Health and Humanitarian Relief: Disaster Preparedness - Output Indicators

The following output indicators are required or optional for all Health and Humanitarian Relief partners who conduct work related to disaster preparedness. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Health & Humanitarian Relief activities	Required v. Optional
# of preparedness shipments or prepositioning	Required
# preparedness tools developed	Required
# preparedness tools accessed	Required

Health and Humanitarian Relief: Disaster Preparedness - Outcome Indicators

The following outcome indicators are required or optional for all Health and Humanitarian Relief partners who conduct work related to disaster preparedness. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a surveylink for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Health & Humanitarian Relief activities	Required v. Optional
Emergency preparedness plans in place or improved	Required
# agencies/organizations adopting collaborative/integrated protocols	Required
Results of third-party capacity assessments (e.g. OCHA)	Optional
% of agencies/organizations with activities/plans to address gender-based violence and trafficking	Optional
% of agencies/organizations with activities/plans to assist vulnerable migrants	Optional
% of agencies/organizations with rapid response teams organized, trained, and equipped with multi-hazard approach	Optional
# of individuals/ businesses/ communities that report they are prepared for disaster	Optional
# of individuals/ businesses/ communities that report they adopted disaster readiness practices	Optional

Health and Humanitarian Relief: Disaster Response - Output Indicators

The following output indicators are required or optional for all Health and Humanitarian Relief partners who conduct work related to disaster response. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Health & Humanitarian Relief activities	Required v. Optional
# crisis(es) supported	Required
# of disaster survivors receiving essential services	Required

Health and Humanitarian Relief: Disaster Response - Outcome Indicators

The following outcome indicators are required or optional for all Health and Humanitarian Relief partners who conduct work related to disaster response. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Health & Humanitarian Relief activities

Required v. Optional

Tell us about a business that reopened after a disaster with your support

Optional

Health and Humanitarian Relief: Disaster Preparedness and Response Training Activities - Output Indicators

The following output indicators are required or optional for all Health and Humanitarian Relief partners who conduct training activities related to disaster preparedness and response. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Health & Humanitarian Relief activities	Required v. Optional
# training sessions conducted	Required
Was this training virtual or in-person	Required
# of individuals received training	Required
Length of training provided (in hours)	Required
Training completion rate (%)	Required
Average Net Promoter Score for trainings	Optional

Health and Humanitarian Relief: Research & Innovation - Output & Outcome Indicators

The following output and outcome indicators are required or optional for all Health and Humanitarian Relief partners who do research/innovation. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Health and Humanitarian activities	Required v. Optional
Tell us about the innovation-focused work that TUPSF support enabled	Required
# points of access for better health outcomes that TUPSF support enabled	Required
Outcome indicators for Health and Humanitarian activities	Required v. Optional
# facilities/clinics providing immunization with functioning cold chain	Required
Description of the adoption or utilization of innovative solutions driven by TUPSF-supported work	Optional

Health and Humanitarian Relief: Anti-Trafficking Training - Output Indicators

The following output indicators are required or optional for all Health and Humanitarian Relief partners who conduct training activities related to anti-trafficking. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Health & Humanitarian Relief activities	Required v. Optional
# of individuals who received anti-trafficking training	Required
# of anti-trafficking sessions conducted	Required
Was the training virtual or in-person	Required
What is the length of training provided (in hours)	Required
Completion rate of the training for individuals (%)	Required
# of UPS drivers who received anti-trafficking training	Required

Health and Humanitarian Relief: Anti-Trafficking Training - Output Indicators Cont.

The following output indicators are required or optional for all Health and Humanitarian Relief partners who conduct training activities related to anti-trafficking. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Health & Humanitarian Relief activities	Required v. Optional
# of UPS drivers trained as anti-trafficking trainers	Required
# training sessions supported by UPS drivers and other drivers	Required
# individuals received training supported by UPS drivers	Required
# of individuals completed training due to UPS in-kind transportation.	Required
Average Net Promoter Score for anti-trafficking trainings	Optional

Health and Humanitarian Relief: Anti-Trafficking Training - Outcome Indicators

The following outcome indicators are required or optional for all Health and Humanitarian Relief partners who conduct training activities related to anti-trafficking. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Health & Humanitarian Relief activities	Required v. Optional
# of truckers who believe they are equipped to take action when they see suspected human trafficking (post-training survey)	Required
# of truckers who report that they have the situational awareness to identify human trafficking (post-training survey)	Required
# of truckers who understand the process for reporting suspected human trafficking (post-training survey)	Required
# of truckers that completed the post-training survey	Required

Health and Humanitarian Relief: Services to Survivors of Trafficking - Output Indicators

The following output indicators are required or optional for all Health and Humanitarian Relief partners who provide services to survivors of trafficking. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Health & Humanitarian Relief activities	Required v. Optional
# of survivors of trafficking receiving essential services	Required
# of survivors of trafficking participating in TUPSF-supported internships and other hands-on experiences	Required
# of survivors of trafficking receiving workforce readiness training	Required
# of training sessions conducted	Required
Was this training virtual or in-person	Required
Length of the training provided (in hours)	Required
Completion rate of the training for individuals (%)	Required
# of survivors of trafficking engaged in restorative/support services (such as individual counseling, group therapy)	Required
Average Net Promoter Score for workforce readiness trainings for survivors of trafficking	Optional
Average Net Promoter Score for restorative/support services for survivors of trafficking	Optional

Health and Humanitarian Relief: Services to Survivors of Trafficking - Outcome Indicators

The following outcome indicators are required or optional for all Health and Humanitarian Relief partners who provide services to survivors of trafficking. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Health & Humanitarian Relief activities	Required v. Optional
# of survivors of trafficking placed into a job by demographics and location	Required
% change in career readiness scores (as measured by the Career Resources Questionnaire)	Optional
# of survivors who transition to continue education	Optional
% of survivor recidivism	Optional
Survivor mental health score post services (mental health index)	Optional

Organizational Capacity Building Indicators

The following outcome indicators are required based on the program activities funded. We are interested in understanding the impact of The UPS Foundation funding/support on partner organizations, in addition to the potential impact on beneficiaries. For each indicator below you will be asked to indicate to what extent The UPS Foundation support you received has helped you, with response options “not at all,” “very little,” “somewhat,” and “significantly.” Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Organizational Capacity Building Indicators	Required v. Optional
Increased capacity for fundraising and capital development	Required
Ability to hire and/or retain qualified staff in all positions	Required
Ability to provide on-the-job training and learning opportunities to enhance staffs' program-related skills	Required
Ability to evaluate impact and make data-driven decisions	Required
Ability to implement new or innovative programs and/or expand existing programs	Required
Ability to incorporate principles related to equity and justice into program design or delivery	Required
Ability to create and test more innovative solutions or products	Required
Gained the knowledge or ability to carry out more technical or specialized work or to carry that work out more effectively.	Required

Systems Change Indicators – Output Indicators

The following output indicators are required or optional for all Health and Humanitarian Relief partners who focus on systems change. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Systems Change	Required v. Optional
# of exponential lives impacted	Required

Systems Change Indicators – Outcome Indicators

The following outcome indicators are required or optional based on the program activities funded. We are interested in understanding the impact of The UPS Foundation funding/support on the primary levers of systems change. For each indicator below, you will be asked to indicate how much progress your TUPSF-supported work made in these areas, with response options “not at all,” “very little,” “somewhat,” and “significantly.” Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply report a result of “not at all.”

Systems Change Levers	Required v. Optional
Policies related to better meeting needs within marginalized communities populated by underserved and underrepresented people have been created, adopted, and implemented. Note that this may include legislation as well as administrative/organizational policies and rules.	Required
Improved practices (including collaboration/coalition building, anti-racist practices, etc.) have been created and implemented by actors within the system your work/program is addressing.	Required
Best practices (including collaboration/coalition building, anti-racist practices, etc.) have been adopted by a broader swath of organizations	Required
Organizations have increased access to funding, human capital, information, and other resources.	Required
Actors within the system you are addressing have greater quantity and quality of connections with one another.	Required
Members of targeted populations/groups have assumed formal and informal leadership and decision-making positions within organizations.	Required
Attitudes and mental models have been shifted to embrace equity, inclusion, and justice more fully.	Required

Systems Change Indicators – Outcome Indicators

The following indicators will be required if you answered “somewhat” or “significantly” to the initial questions about systems change. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Policies related to better meeting needs within marginalized communities populated by underserved and underrepresented people are created, adopted, and implemented.	Required v. Optional
# laws or pieces of legislation have been adopted, improved, and/or implemented through the contributions of your TUPSF support.	Required
Open-ended: How has your work contributed to or guided the policy change process for key systems change policies?	Required
Open-ended: How many administrative or organizational policies/rules have been adopted that your work contributed to?	Required
Open-ended: What other actors did you collaborate with in order to build momentum for policy reform?	Required
Open-ended: How did your targeted populations benefit from the policy changes your work supported?	Required
Best practices (including collaboration/coalition building, anti-racist practices, etc.) are adopted by a broader swath of organization	Required v. Optional
Scale of best practice adoption (# people/organizations)	Required
Open-ended: Describe the creation and implementation of your improved practice(s), why these were necessary, and how they were identified as appropriate solutions.	Required
Open-ended: How has your work contributed to the increased adoption of best practices and encouraged the independent replication of your idea? i.e. How have you shaped or built the field?	Required

Systems Change Indicators – Outcome Indicators

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Organizations have increased access to funding, human capital, information, and other resources.	Required v. Optional
Open-ended: How has your work facilitated the distribution of knowledge and information within the system?	Required
Open-ended: How has your work helped the reallocation of resources flow into the system?	Required
% change in funding/staffing/resources/knowledge that your work helped support	Required
Actors have greater quantity and quality of connections with one another.	Required v. Optional
Open-ended: How has your work facilitated connectivity between key actors in the system?	Required
Open-ended: How has your contribution helped the movements grow in participation, reach, voice, and platform?	Required
Self-rating: How connected your organization feels to the other actors working towards this system's change.	Required

Systems Change Indicators – Outcome Indicators

The following indicators will be required if you answered “somewhat” or “significantly” to the initial questions about systems change. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Members of underserved/underrepresented groups hold formal and informal leadership and decision-making positions within organizations.

Required v. Optional

Assess the level of participation (participation ladder) in your work by the following groups you serve.

Required

Rate to what extent members of underserved/underrepresented groups/community members are involved in specific tasks listed.

Required

Open-ended: How is your work including local community members in the decision-making?
Note: Decision-making/leadership can be both formal (e.g. elected positions) and informal (e.g. influence)

Required

Attitudes and mental models are shifted to embrace equity, inclusion, and justice more fully.

Required v. Optional

Open-ended: How has your work guided shifts in attitudes/mental models/public narratives and why does this matter? i.e., what levers are you pulling to try and influence the conversation more broadly and build demand?

Required



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**Corporate Partners
(Grants, In-kind Logistics and Delivery,
& On-Loan Executives)**

**Equity and Economic Empowerment
Measurement and Reporting
Requirements**

Measurement & Reporting Requirement Descriptions

Meetings

At Start of Partnership



MEL Kick-Off Meeting

Meeting (virtual) to finalize reporting requirements, required indicators, and formats and discuss any concerns or anticipated challenges. May require multiple meetings for large grants.



Bi-Annual

Partnership Status Meetings

This meeting (virtual) will be an opportunity to check in with The UPS Foundation team on grant progress, accomplishments, upcoming project activities, and challenges faced. No slides are required. The project status update form submission will be the basis for the discussion. Questions that arise mid-cycle from both sides will be saved for this meeting.



At End of Support Period

Completion Meeting

This meeting provides a final opportunity for TUPSF and grantees to connect to discuss achievements, lessons learned, and best practices.

Reports

Bi-Annual



Partnership Status and Indicator Update

Concise update (via survey link) on key activities completed, progress against each of the grant goals, grant spending (budget vs. actual), lessons learned, risks/challenges, and key accomplishments.



Annual

GRI Indicator Report*

A very brief report on key indicators, such as lives impacted and number of trees planted.



At End of Support Period

Completion Report

Comprehensive report (via survey link) that discusses project accomplishments, impacts, stories, lessons learned and progress for output, outcome, and systems indicators.



Variable

Post-Completion Follow-up

Submission (via survey link) seeking reporting on systems changes, outcomes, and output indicators one or more years post-completion (for large grantees) enables TUPSF to assess changes that may be longer term in nature.

Other

Variable



Third-Party Impact Evaluation

Third-party evaluations provide robust and objective insights into the processes and achievements of projects, including providing credible evidence of *what worked*, *by how much*, and *why*.

Partnership Status and Indicator Update Form Details

Corporate partners are required to submit a partnership status and indicator update form on a bi-annual basis. The form template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

The UPS Foundation requires reporting on specific output- and outcome-level indicators to enable aggregation at the portfolio level. However, The UPS Foundation also values the unique impact of each partner so includes room for partners to share any additional indicators that help to communicate their impact.

The form will request the following information:

Geographic location of TUPSF support provided

Major accomplishments, milestones, and activities during the support period

Activities and milestones anticipated in the next 3-6 months

Progress toward short-term goals

Program risks and lessons learned

Impact of The UPS Foundation support on organizational capacity

Impact of The UPS Foundation support on intended beneficiaries

The UPS Foundation-required output- and outcome-level indicators

Specific stories of impact (individual- and/or community-level) highlighting the program's positive impacts for beneficiaries

Details on funding utilization/budget

Feedback on TUPSF support

Partners who receive funding of \$15,000 or more are required to submit a GRI Indicator Report on an annual basis. This very brief report focuses on a calendar year (January 1 - December 31) and is due mid-December. The form template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

The form will request the following information:

lives positively impacted

vaccines delivered in-kind to countries in need, by kind/type

disasters responded to by location

countries reached by location

trees planted by location

female and small business owners connected to the global economy/acquired job readiness skills (in general and through UPS's Women Exporters Program)

young adults provided equitable access to academic support for college/career enrichment opportunities

exponential lives positively impacted (systems change work only)

Completion Report Form Details

The completion form submission is required once at the end of the funding cycle. The template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

The UPS Foundation requires reporting on specific output- and outcome-level indicators to enable aggregation at the portfolio level. However, The UPS Foundation also values the unique impact of each partner so includes room for partners to share any additional indicators that help to communicate their impact.

The form will request the following information:

Summary of impact of The UPS Foundation support on intended beneficiaries

Key activities and milestones completed during the reporting period

Progress toward goals of TUPSF support

Organizational capacity building indicators and stories of impact for the supported organization

The UPS Foundation-required output- and outcome-level indicators

Sustainable Development Goals supported

Lessons learned in terms of what worked well and what did not work as anticipated/what might you have done differently

Breakdown of spending by categories

Specific stories of impact (individual- and/or community-level) highlighting the program's positive impacts for beneficiaries

Feedback on TUPSF support

Equity and Economic Empowerment: All Partners - Output Indicators

The following output indicators are required or optional for all Equity and Economic Empowerment partners. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Equity and Economic Empowerment activities	Required v. Optional
Total # of lives impacted by location, low-to-moderate income, disability, and demographics	Required
Country(ies), states, priority market supported	Required
Unit cost/ average dollar cost of delivering a single unit of your service to an individual (\$USD)	Optional

Indicator Guidance: Lives Impacted

All partners of The UPS Foundation are asked to report on the indicator "total # lives impacted," which contributes to our goal of positively impacting one billion lives by 2040. We ask that partners report on the lives directly impacted in the work supported by The UPS Foundation partnership. As a general rule, you should not report on the total number of individuals in an affected geographic region, individuals served/trained through non-UPS funding, or media visits/views. We highly encourage you to review your methodology to avoid double counting; for example, if you count both the number of individuals trained and the number of individuals placed into jobs, please de-duplicate these numbers before reporting on the total lives impacted.

Examples of figures that are considered valid or invalid for inclusion in your reporting based on The UPS Foundation Program Activities are included in the [Appendix](#) to this guidebook.

For additional guidance or to discuss your proposed methodology for calculating lives impacted, please reach out to your UPS point of contact.

Equity and Economic Empowerment: All Partners - Outcome Indicators

The following outcome indicators are required or optional for all Equity and Economic Empowerment partners. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Equity and Economic Empowerment activities	Required v. Optional
% of women involved in making major household decisions	Required
% of women who report confidence in using financial products or services	Required
% change in beneficiaries' well-being score (as measured by WHO-5)	Required
Average change in financial well-being for beneficiaries within 12 mos. of program completion (pre-/post-intervention) (based on CFPB financial well-being score or equivalent)	Optional
% change in beneficiary wages within 12 months of program completion (pre-/post-intervention) by demographics	Optional
% change in beneficiaries' resilience score (as measured by the Brief Resilience Scale)	Optional
% change in beneficiaries' perception of neighborhood safety	Optional

Equity and Economic Empowerment: Workforce and Leadership Development Activities - Output Indicators

The following output indicators are required or optional for all Equity and Economic Empowerment partners who conduct training and mentorship activities focused on workforce and/or leadership development. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Equity and Economic Empowerment activities	Required v. Optional
# of individuals who received trainings (disaggregated by workforce readiness, leadership, other)	Required
# training sessions conducted	Required
Completion rate of trainings (%)	Required
Length of training provided (in hours)	Required
Was the training virtual or in person	Required
# individuals who participated in mentorship	Required
# of individuals participating in TUPSF-supported internships and other hands-on experiences	Required
Average Net Promoter Score (NPS) for trainings	Optional
Average Net Promoter Score (NPS) for mentorship	Optional
# of new training modules developed	Optional

Equity and Economic Empowerment: Workforce and Leadership Development Activities - Outcome Indicators

The following outcome indicators are required or optional for all Equity and Economic Empowerment partners who conduct training and mentorship activities focused on workforce and/or leadership development. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Equity and Economic Empowerment activities	Required v. Optional
% change in leadership self-efficacy (pre-/post program)	Required
# of supported individuals who transition to employment/further education	Required
# of workers placed into a job by demographics and location	Required
# of individuals placed into a part-time job	Required
# of individuals placed into a full-time job	Required
# of individuals hired who were previously unemployed	Required

Equity and Economic Empowerment: Workforce and Leadership Development Activities - Outcome Indicators Cont.

The following outcome indicators are required or optional for all Equity and Economic Empowerment partners who conduct training and mentorship activities focused on workforce and/or leadership development. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Equity and Economic Empowerment activities	Required v. Optional
# of supported individuals placed into a job that provides health insurance benefits	Required
# of supported individuals who retain their job for 6 months or more after starting	Optional
# of supported individuals who advanced their career within 12 months of program completion	Optional
# of supported individuals who transitioned from one job to another as a result of program participation	Optional
# of supported individuals who report they are able to cover their rent/ mortgage with their current income	Optional
# of individuals who report greater confidence in their job-related skills or abilities	Optional
% change in career readiness scores (as measured by the Career Resources Questionnaire)	Optional

Equity and Economic Empowerment: Education Activities - Output & Outcome Indicators

The following output and outcome indicators are required or optional for all Equity and Economic Empowerment partners who conduct education-focused activities for youth aged 14-24. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Equity and Economic Empowerment activities	Required v. Optional
Total # participants, by demographics	Required
Total # individuals receiving support services	Required
Average Net Promoter Score (NPS) for educational programming	Optional

Outcome indicators for Equity and Economic Empowerment activities	Required v. Optional
Graduation rate for participants	Required
# of supported individuals who transition to employment/further education	Required
% change in career readiness scores (as measured by the Career Resources Questionnaire)	Optional

Equity and Economic Empowerment: SME/SMB - Output Indicators

The following output indicators are required or optional for all Equity and Economic Empowerment partners who distribute microloans and provide SME/SMB training. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Equity and Economic Empowerment activities	Required v. Optional
# of businesses supported, by demographics of business owner	Required
Total # of employees of small businesses supported	Required
Average revenue (\$USD) of small businesses supported	Required
# and dollar value of microloans, small business loans, and seed funding distributed	Required
# of recipients of microloans, small business loans, and seed funding by gender	Required
# and dollar value of microloans, small business loans, and seed funding distributed to women owned businesses	Required
# of microloans, small business loans, and seed funding by purpose	Optional
# of businesses supported by industry	Optional
# of small businesses supported with e-commerce business model	Optional
Average Net Promoter Score (NPS) for microloan, small business loan, and seed funding program	Optional

Equity and Economic Empowerment: SME/SMB - Output Indicators Cont.

The following output indicators are required or optional for all Equity and Economic Empowerment partners who distribute microloans and provide SME/SMB training. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Equity and Economic Empowerment activities	Required v. Optional
# of individuals who received trainings, by gender	Required
# training sessions conducted	Required
Was this training virtual or in person	Required
Length of training (in hours)	Required
Training completion rate (%)	Required
Total hours of advisory services/training/capacity building activities/technical assistance provided to small businesses	Optional
# of businesses supported by industry	Optional
# of products/services developed/implemented in coordination with government bodies	Optional
# of products/ services developed or new partnerships established to improve resource flows to women entrepreneurs	Optional
Average Net Promoter Score (NPS) for trainings	Optional

Equity and Economic Empowerment: SME/SMB - Outcome Indicators

The following outcome indicators are required or optional based on total support amount for all Equity and Economic Empowerment partners who distribute microloans and provide SME/SMB training. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Equity and Economic Empowerment activities	Required v. Optional
% change in entrepreneurial self-efficacy (pre/post program), by gender	Required
# of businesses that scaled up as a result of TUPSF support by business owner demographics	Required
# of businesses that reported increased revenue based on the support provided by TUPSF	Required
# of jobs created	Required
# of female small business owners in your program that are connected to the global economy	Required
# of micro businesses that scaled to small businesses	Optional

Equity and Economic Empowerment: Advocacy - Output Indicators

The following output indicators are required or optional for all Equity and Economic Empowerment partners who focus on advocacy. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Equity and Economic Empowerment activities	Required v. Optional
Explanation of how key issue area(s) were identified and defined	Required
# of organizations attending meetings/assemblies around issue(s) of focus	Required
# of participants at advocacy events	Required
# of individuals targeted with information about issue(s) of focus	Optional

Equity and Economic Empowerment: Advocacy - Outcome Indicators

The following outcome indicators are required or optional for all Equity and Economic Empowerment partners who focus on advocacy. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Equity and Economic Empowerment activities	Required v. Optional
# of organizations actively involved in coalition around issue of focus	Required
# of new champions/advocates recruited, including new constituencies represented	Required
# of elected officials who publicly support the campaign	Required
# of litigation in favor of the program's position	Required
% of target audience who believe that the issue is important to them	Optional
# of individuals providing donations to support the initiative	Optional
% of desired actions taken by government agency(ies)	Optional

Equity and Economic Empowerment: Research & Innovation - Output & Outcome Indicators

The following output and outcome indicators are required or optional for all Equity and Economic Empowerment partners who do research/innovation. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Equity and Economic Empowerment activities	Required v. Optional
Tell us about the innovation-focused work that TUPSF support enabled	Required
Outcome indicators for Equity and Economic Empowerment activities	Required v. Optional
Description of the adoption or utilization of innovative solutions driven by TUPSF-supported work	Optional

Organizational Capacity Building Indicators

The following outcome indicators are required based on the program activities funded. We are interested in understanding the impact of The UPS Foundation funding/support on partner organizations, in addition to the potential impact on beneficiaries. For each indicator below you will be asked to indicate to what extent The UPS Foundation support you received has helped you, with response options “not at all,” “very little,” “somewhat,” and “significantly.” Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Organizational Capacity Building Indicators	Required v. Optional
Increased capacity for fundraising and capital development	Required
Ability to hire and/or retain qualified staff in all positions	Required
Ability to provide on-the-job training and learning opportunities to enhance staffs' program-related skills	Required
Ability to evaluate impact and make data-driven decisions	Required
Ability to implement new or innovative programs and/or expand existing programs	Required
Ability to incorporate principles related to equity and justice into program design or delivery	Required
Ability to create and test more innovative solutions or products	Required
Gained the knowledge or ability to carry out more technical or specialized work or to carry that work out more effectively.	Required

Systems Change Indicators – Output Indicators

The following output indicators are required or optional for all partners who focus on systems change. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Systems Change	Required v. Optional
# of exponential lives impacted	Required

Systems Change Indicators – Outcome

The following outcome indicators are required or optional based on the program activities funded. We are interested in understanding the impact of The UPS Foundation funding/support on the primary levers of systems change. For each indicator below, you will be asked to indicate how much progress your TUPSF-supported work made in these areas, with response options “not at all,” “very little,” “somewhat,” and “significantly.” Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply report a result of “not at all.”

Systems Change Levers	Required v. Optional
Policies related to better meeting needs within marginalized communities populated by underserved and underrepresented people have been created, adopted, and implemented. Note that this may include legislation as well as administrative/organizational policies and rules.	Required
Improved practices (including collaboration/coalition building, anti-racist practices, etc.) have been created and implemented by actors within the system your work/program is addressing.	Required
Best practices (including collaboration/coalition building, anti-racist practices, etc.) have been adopted by a broader swath of organizations	Required
Organizations have increased access to funding, human capital, information, and other resources.	Required
Actors within the system you are addressing have greater quantity and quality of connections with one another.	Required
Members of targeted populations/groups have assumed formal and informal leadership and decision-making positions within organizations.	Required
Attitudes and mental models have been shifted to embrace equity, inclusion, and justice more fully.	Required

Systems Change Indicators – Outcome Indicators

The following indicators will be required if you answered “somewhat” or “significantly” to the initial questions about systems change. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Policies related to better meeting needs within marginalized communities populated by underserved and underrepresented people are created, adopted, and implemented.	Required v. Optional
# laws or pieces of legislation have been adopted, improved, and/or implemented through the contributions of your TUPSF support.	Required
Open-ended: How has your work contributed to or guided the policy change process for key systems change policies?	Required
Open-ended: How many administrative or organizational policies/rules have been adopted that your work contributed to?	Required
Open-ended: What other actors did you collaborate with in order to build momentum for policy reform?	Required
Open-ended: How did your targeted populations benefit from the policy changes your work supported?	Required
Best practices (including collaboration/coalition building, anti-racist practices, etc.) are adopted by a broader swath of organization	Required v. Optional
Open-ended: Describe the creation and implementation of your improved practice(s), why these were necessary, and how they were identified as appropriate solutions.	Required
Open-ended: How has your work contributed to the increased adoption of best practices and encouraged the independent replication of your idea? i.e. How have you shaped or built the field?	Required

Systems Change Indicators – Outcome Indicators

The following indicators will be required if you answered “somewhat” or “significantly” to the initial questions about systems change. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Organizations have increased access to funding, human capital, information, and other resources.	Required v. Optional
Open-ended: How has your work facilitated the distribution of knowledge and information within the system?	Required
Open-ended: How has your work helped the reallocation of resources flow into the system?	Required
% change in funding/staffing/resources/knowledge that your work helped support	Required

Actors have greater quantity and quality of connections with one another.	Required v. Optional
Open-ended: How has your work facilitated connectivity between key actors in the system?	Required
Open-ended: How has your contribution helped the movements grow in participation, reach, voice, and platform?	Required
Self-rating: How connected your organization feels to the other actors working towards this system's change.	Required

Systems Change Indicators – Outcome Indicators

The following indicators will be required if you answered “somewhat” or “significantly” to the initial questions about systems change. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Members of underserved/underrepresented groups hold formal and informal leadership and decision-making positions within organizations.	Required v. Optional
Assess the level of participation (participation ladder) in your work by the following groups you serve.	Required
Rate to what extent members of underserved/underrepresented groups/community members are involved in specific tasks listed.	Required
Open-ended: How is your work including local community members in the decision-making? Note: Decision-making/leadership can be both formal (e.g. elected positions) and informal (e.g. influence)	Required
Attitudes and mental models are shifted to embrace equity, inclusion, and justice more fully.	Required v. Optional
Open-ended: How has your work guided shifts in attitudes/mental models/public narratives and why does this matter? i.e., what levers are you pulling to try and influence the conversation more broadly and build demand?	Required



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Corporate Partners
(Grants, In-kind Logistics and Delivery,
& On-Loan Executives)

Local Community Engagement
Measurement and Reporting
Requirements

Measurement & Reporting Requirement Descriptions

Meetings

At Start of Partnership



MEL Kick-Off Meeting

Meeting (virtual) to finalize reporting requirements, required indicators, and formats and discuss any concerns or anticipated challenges. May require multiple meetings for large grants.



Bi-Annual

Partnership Status Meetings

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At End of Support Period

Completion Meeting

This meeting provides a final opportunity for TUPSF and grantees to connect to discuss achievements, lessons learned, and best practices.

Reports

Bi-Annual

Partnership Status and Indicator Update

Concise update (via survey link) on key activities completed, progress against each of the grant goals, grant spending (budget vs. actual), lessons learned, risks/challenges, and key accomplishments.



Annual

GRI Indicator Report*

A very brief report on key indicators, such as lives impacted and number of trees planted.



At End of Support Period

Completion Report

Comprehensive report (via survey link) that discusses project accomplishments, impacts, stories, lessons learned and progress for output, outcome, and systems indicators.



Variable

Post-Completion Follow-up

Submission (via survey link) seeking reporting on systems changes, outcomes, and output indicators one or more years post-completion (for large grantees) enables TUPSF to assess changes that may be longer term in nature.



Other

Variable

Third-Party Impact Evaluation

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Activities and milestones anticipated in the next 3-6 months

Progress toward short-term goals

Program risks and lessons learned

Impact of The UPS Foundation support on organizational capacity

Impact of The UPS Foundation support on intended beneficiaries

The UPS Foundation-required output- and outcome-level indicators

Specific stories of impact (individual- and/or community-level) highlighting the program's positive impacts for beneficiaries

Details on funding utilization/budget

Feedback on TUPSF support

GRI Indicator Report

Partners who receive funding of \$15,000 or more are required to submit a GRI Indicator Report on an annual basis. This very brief report focuses on a calendar year (January 1 - December 31) and is due mid-December. The form template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

The form will request the following information:

lives positively impacted

vaccines delivered in-kind to countries in need, by kind/type

disasters responded to by location

countries reached by location

trees planted by location

female and small business owners connected to the global economy/acquired job readiness skills (in general and through UPS's Women Exporters Program)

young adults provided equitable access to academic support for college/career enrichment opportunities

exponential lives positively impacted (systems change work only)

Completion Report Form Details

The completion form submission is required once at the end of the funding cycle. The template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

The UPS Foundation requires reporting on specific output- and outcome-level indicators to enable aggregation at the portfolio level. However, The UPS Foundation also values the unique impact of each partner so includes room for partners to share any additional indicators that help to communicate their impact.

The form will request the following information:

Summary of impact of The UPS Foundation support on intended beneficiaries

Key activities and milestones completed during the reporting period

Progress toward goals of TUPSF support

Organizational capacity building indicators and stories of impact for the supported organization

The UPS Foundation-required output- and outcome-level indicators

Sustainable Development Goals supported

Lessons learned in terms of what worked well and what did not work as anticipated/what might you have done differently

Breakdown of spending by categories

Specific stories of impact (individual- and/or community-level) highlighting the program's positive impacts for beneficiaries

Feedback on TUPSF support

Local Community Engagement - Output Indicators

The following output indicators are required or optional for all Local Community Engagement partners. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Local Community Engagement activities	Required v. Optional
Total # of lives impacted by location, low-to-moderate income, disability, and demographics	Required
Country(ies), states, priority market supported	Required
Unit cost/ average dollar cost of delivering a single unit of your service to an individual (\$USD)	Optional

Indicator Guidance: Lives Impacted

All partners of The UPS Foundation are asked to report on the indicator "total # lives impacted," which contributes to our goal of positively impacting one billion lives by 2040. We ask that partners report on the lives directly impacted in the work supported by The UPS Foundation partnership. As a general rule, you should not report on the total number of individuals in an affected geographic region, individuals served/trained through non-UPS funding, or media visits/views. We highly encourage you to review your methodology to avoid double counting; for example, if you count both the number of individuals trained and the number of individuals placed into jobs, please de-duplicate these numbers before reporting on the total lives impacted.

Examples of figures that are considered valid or invalid for inclusion in your reporting based on The UPS Foundation Program Activities are included in the [Appendix](#) to this guidebook.

For additional guidance or to discuss your proposed methodology for calculating lives impacted, please reach out to your UPS point of contact.

Local Community Engagement: Volunteerism - Output & Outcome Indicators

The following output and outcome indicators are required or optional for all partners who engage with UPS-sponsored volunteer events. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Volunteer Activities	Required v. Optional
# of UPS employee and friend/family volunteers	Required
Total # of lives impacted as a result of volunteer activities (e.g. individuals receiving meals, lawn care assistance, etc.)	Required
Location(s) of volunteer activities (country; state; city <u>and</u> whether location is considered underserved or predominantly Black)	Required
Media stories related to UPS volunteerism with your organization	Optional

Outcome indicators for Volunteer Activities	Required v. Optional
Stories of impact from volunteer event (for individuals and/or communities)	Required
Satisfaction with volunteer support	Required
Open-ended: Briefly describe your experience with TUPSF volunteer support	Required

Organizational Capacity Building Indicators

The following outcome indicators are required based on the program activities funded. We are interested in understanding the impact of The UPS Foundation funding/support on partner organizations, in addition to the potential impact on beneficiaries. For each indicator below you will be asked to indicate to what extent The UPS Foundation support you received has helped you, with response options “not at all,” “very little,” “somewhat,” and “significantly.” Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Organizational Capacity Building Indicators	Required v. Optional
Increased capacity for fundraising and capital development	Required
Ability to hire and/or retain qualified staff in all positions	Required
Ability to provide on-the-job training and learning opportunities to enhance staffs' program-related skills	Required
Ability to evaluate impact and make data-driven decisions	Required
Ability to implement new or innovative programs and/or expand existing programs	Required
Ability to incorporate principles related to equity and justice into program design or delivery	Required
Ability to create and test more innovative solutions or products	Required
Gained the knowledge or ability to carry out more technical or specialized work or to carry that work out more effectively.	Required



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Corporate Partners
(Grants, In-kind Logistics and Delivery,
& On-Loan Executives)

Planet Protection

**Measurement and Reporting
Requirements**

Measurement & Reporting Requirement Descriptions

Meetings

At Start of Partnership



MEL Kick-Off Meeting

Meeting (virtual) to finalize reporting requirements, required indicators, and formats and discuss any concerns or anticipated challenges. May require multiple meetings for large grants.



Bi-Annual

Partnership Status Meetings

This meeting (virtual) will be an opportunity to check in with The UPS Foundation team on grant progress, accomplishments, upcoming project activities, and challenges faced. No slides are required. The project status update form submission will be the basis for the discussion. Questions that arise mid-cycle from both sides will be saved for this meeting.



At End of Support Period

Completion Meeting

This meeting provides a final opportunity for TUPSF and grantees to connect to discuss achievements, lessons learned, and best practices.

Reports

Bi-Annual

Partnership Status and Indicator Update

Concise update (via survey link) on key activities completed, progress against each of the grant goals, grant spending (budget vs. actual), lessons learned, risks/challenges, and key accomplishments.



Annual

GRI Indicator Report*

A very brief report on key indicators, such as lives impacted and number of trees planted.



At End of Support Period

Completion Report

Comprehensive report (via survey link) that discusses project accomplishments, impacts, stories, lessons learned and progress for output, outcome, and systems indicators.



Variable

Post-Completion Follow-up

Submission (via survey link) seeking reporting on systems changes, outcomes, and output indicators one or more years post-completion (for large grantees) enables TUPSF to assess changes that may be longer term in nature.



Other

Variable

Third-Party Impact Evaluation

Third-party evaluations provide robust and objective insights into the processes and achievements of projects, including providing credible evidence of *what worked*, *by how much*, and *why*.



Partnership Status and Indicator Update Form Details

Corporate partners are required to submit a partnership status and indicator update form on a bi-annual basis. The form template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

The UPS Foundation requires reporting on specific output- and outcome-level indicators to enable aggregation at the portfolio level. However, The UPS Foundation also values the unique impact of each partner so includes room for partners to share any additional indicators that help to communicate their impact.

The form will request the following information:

Geographic location of TUPSF support provided

Major accomplishments, milestones, and activities during the support period

Activities and milestones anticipated in the next 3-6 months

Progress toward short-term goals

Program risks and lessons learned

Impact of The UPS Foundation support on organizational capacity

Impact of The UPS Foundation support on intended beneficiaries

The UPS Foundation-required output- and outcome-level indicators

Specific stories of impact (individual- and/or community-level) highlighting the program's positive impacts for beneficiaries

Details on funding utilization/budget

Feedback on TUPSF support

Partners who receive funding of \$15,000 or more are required to submit a GRI Indicator Report on an annual basis. This very brief report focuses on a calendar year (January 1 - December 31) and is due mid-December. The form template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

The form will request the following information:

lives positively impacted

vaccines delivered in-kind to countries in need, by kind/type

disasters responded to by location

countries reached by location

trees planted by location

female and small business owners connected to the global economy/acquired job readiness skills (in general and through UPS's Women Exporters Program)

young adults provided equitable access to academic support for college/career enrichment opportunities

exponential lives positively impacted (systems change work only)

Completion Report Form Details

The completion form submission is required once at the end of the funding cycle. The template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

The UPS Foundation requires reporting on specific output- and outcome-level indicators to enable aggregation at the portfolio level. However, The UPS Foundation also values the unique impact of each partner so includes room for partners to share any additional indicators that help to communicate their impact.

The form will request the following information:

Summary of impact of The UPS Foundation support on intended beneficiaries

Key activities and milestones completed during the reporting period

Progress toward goals of TUPSF support

Organizational capacity building indicators and stories of impact for the supported organization

The UPS Foundation-required output- and outcome-level indicators

Sustainable Development Goals supported

Lessons learned in terms of what worked well and what did not work as anticipated/what might you have done differently

Breakdown of spending by categories

Specific stories of impact (individual- and/or community-level) highlighting the program's positive impacts for beneficiaries

Feedback on TUPSF support

Planet Protection: All Partners - Output Indicators

The following output indicators are required or optional for all Planet Protect partners. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Planet Protection activities	Required v. Optional
Total # lives impacted, by location, low-to-moderate income, disability, and demographics	Required
Country(ies), states, priority market supported	Required
# trees planted, by type (e.g. lumber/ fruit) and location	Required
# trees planted, by target environment (e.g. schools; watershed/riparian restoration; forest fire restoration; urban areas, communities affected by disaster)	Optional
# agroforestry projects funded, by location	Optional
Unit cost/ average dollar cost of delivering a single unit of your service to an individual (\$USD)	Optional

Indicator Guidance: Lives Impacted

All partners of The UPS Foundation are asked to report on the indicator "total # lives impacted," which contributes to our goal of positively impacting one billion lives by 2040. We ask that partners report on the lives directly impacted in the work supported by The UPS Foundation partnership. As a general rule, you should not report on the total number of individuals in an affected geographic region, individuals served/trained through non-UPS funding, or media visits/views. We highly encourage you to review your methodology to avoid double counting; for example, if you count both the number of individuals trained and the number of individuals placed into jobs, please de-duplicate these numbers before reporting on the total lives impacted.

Examples of figures that are considered valid or invalid for inclusion in your reporting based on The UPS Foundation Program Activities are included in the [Appendix](#) to this guidebook.

For additional guidance or to discuss your proposed methodology for calculating lives impacted, please reach out to your UPS point of contact.

Planet Protection: All Partners - Outcome Indicators

The following outcome indicators are required or optional for all Planet Protect partners. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Outcome indicators for Planet Protection activities	Required v. Optional
Average survival rate of trees planted	Required
# of individuals with increased income (self-reported) by demographics	Required
Stories of impact by city/country describing the benefit of tree planting (e.g. providing shade in a schoolyard)	Required
Projected # of trees that will reach maturity	Required
# acres/hectars of land preserved or restored (i.e., bio-diversity)	Optional
# acres/hectars of land improved or maintained (i.e., cleaning up trash/weeding)	Optional
# farmers implementing land and forest management practices	Optional

Planet Protection: Training Activities - Output Indicators

The following output indicators are required or optional for all Planet Protect partners who do training activities. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Planet Protection activities	Required v. Optional
# training sessions conducted	Required
Was this training virtual or in-person	Required
Training completion rate (%)	Required
What is the length of the training provided (in hours)	Required
# of individuals received training	Required
Average Net Promoter Score (NPS) for training sessions	Optional

Planet Protection: Research & Innovation - Output & Outcome Indicators

The following output and outcome indicators are required or optional for all Planet Protection partners who do research/innovation. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Planet Protection activities	Required v. Optional
Tell us about the innovation-focused work that TUPSF support enabled	Required
Outcome indicators for Planet Protection activities	Required v. Optional
Description of the adoption or utilization of innovative solutions driven by TUPSF-supported work	Optional

Planet Protection: Hiring/Job Creation Related to Tree Planting - Output & Outcome Indicators

The following output and outcome indicators are required or optional for all Planet Protect partners who do hiring/job creation related to tree planting. Optional indicators are encouraged if the data is available. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Planet Protection activities	Required v. Optional
# of jobs created/supported for tree planting initiatives by demographics	Required
# of individuals hired for tree planting initiatives by demographics by demographics	Optional
# of individuals hired for tree planting initiatives who were previously unemployed by demographics	Optional
# of individuals hired for tree planting initiatives in long-term positions (without a discrete end date) by demographics	Optional
Outcome indicators for Planet Protection activities	Required v. Optional
Average change in financial well-being for beneficiaries within 12 months of program completion (pre-/post-intervention) (based on CFPB financial well-being score or equivalent)	Optional

Organizational Capacity Building Indicators

The following outcome indicators are required based on the program activities funded. We are interested in understanding the impact of The UPS Foundation funding/support on partner organizations, in addition to the potential impact on beneficiaries. For each indicator below you will be asked to indicate to what extent The UPS Foundation support you received has helped you, with response options “not at all,” “very little,” “somewhat,” and “significantly.” Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Organizational Capacity Building Indicators	Required v. Optional
Increased capacity for fundraising and capital development	Required
Ability to hire and/or retain qualified staff in all positions	Required
Ability to provide on-the-job training and learning opportunities to enhance staffs' program-related skills	Required
Ability to evaluate impact and make data-driven decisions	Required
Ability to implement new or innovative programs and/or expand existing programs	Required
Ability to incorporate principles related to equity and justice into program design or delivery	Required
Ability to create and test more innovative solutions or products	Required
Gained the knowledge or ability to carry out more technical or specialized work or to carry that work out more effectively.	Required

Systems Change Indicators – Output Indicators

The following output indicators are required or optional for all who focus on systems change. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Systems Change	Required v. Optional
# of exponential lives impacted	Required

Systems Change Indicators – Outcome Indicators

The following outcome indicators are required or optional based on the program activities funded. We are interested in understanding the impact of The UPS Foundation funding/support on the primary levers of systems change. For each indicator below, you will be asked to indicate how much progress your TUPSF-supported work made in these areas, with response options “not at all,” “very little,” “somewhat,” and “significantly.” Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply report a result of “not at all.”

Systems Change Levers	Required v. Optional
Policies related to better meeting needs within marginalized communities populated by underserved and underrepresented people have been created, adopted, and implemented. Note that this may include legislation as well as administrative/organizational policies and rules.	Required
Improved practices (including collaboration/coalition building, anti-racist practices, etc.) have been created and implemented by actors within the system your work/program is addressing.	Required
Best practices (including collaboration/coalition building, anti-racist practices, etc.) have been adopted by a broader swath of organizations	Required
Organizations have increased access to funding, human capital, information, and other resources.	Required
Actors within the system you are addressing have greater quantity and quality of connections with one another.	Required
Members of targeted populations/groups have assumed formal and informal leadership and decision-making positions within organizations.	Required
Attitudes and mental models have been shifted to embrace equity, inclusion, and justice more fully.	Required

Systems Change Indicators – Outcome Indicators

The following indicators will be required if you answered “somewhat” or “significantly” to the initial questions about systems change.

Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Policies related to better meeting needs within marginalized communities populated by underserved and underrepresented people are created, adopted, and implemented.	Required v. Optional
# laws or pieces of legislation have been adopted, improved, and/or implemented through the contributions of your TUPSF support.	Required
Open-ended: How has your work contributed to or guided the policy change process for key systems change policies?	Required
Open-ended: How many administrative or organizational policies/rules have been adopted that your work contributed to?	Required
Open-ended: What other actors did you collaborate with in order to build momentum for policy reform?	Required
Open-ended: How did your targeted populations benefit from the policy changes your work supported?	Required
Best practices (including collaboration/coalition building, anti-racist practices, etc.) are adopted by a broader swath of organization	Required v. Optional
Open-ended: Describe the creation and implementation of your improved practice(s), why these were necessary, and how they were identified as appropriate solutions.	Required
Open-ended: How has your work contributed to the increased adoption of best practices and encouraged the independent replication of your idea? i.e. How have you shaped or built the field?	Required

Systems Change Indicators – Outcome Indicators

The following indicators will be required if you answered “somewhat” or “significantly” to the initial questions about systems change. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Organizations have increased access to funding, human capital, information, and other resources.	Required v. Optional
Open-ended: How has your work facilitated the distribution of knowledge and information within the system?	Required
Open-ended: How has your work helped the reallocation of resources flow into the system?	Required
% change in funding/staffing/resources/knowledge that your work helped support	Required
Actors have greater quantity and quality of connections with one another.	Required v. Optional
Open-ended: How has your work facilitated connectivity between key actors in the system?	Required
Open-ended: How has your contribution helped the movements grow in participation, reach, voice, and platform?	Required
Self-rating: How connected your organization feels to the other actors working towards this system's change.	Required

Systems Change Indicators – Outcome Indicators

The following indicators will be required if you answered “somewhat” or “significantly” to the initial questions about systems change. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Members of underserved/underrepresented groups hold formal and informal leadership and decision-making positions within organizations.	Required v. Optional
Assess the level of participation (participation ladder) in your work by the following groups you serve.	Required
Rate to what extent members of underserved/underrepresented groups/community members are involved in specific tasks listed.	Required
Open-ended: How is your work including local community members in the decision-making? Note: Decision-making/leadership can be both formal (e.g. elected positions) and informal (e.g. influence)	Required
Attitudes and mental models are shifted to embrace equity, inclusion, and justice more fully.	Required v. Optional
Open-ended: How has your work guided shifts in attitudes/mental models/public narratives and why does this matter? i.e., what levers are you pulling to try and influence the conversation more broadly and build demand?	Required



If you have questions or concerns about your Measurement and reporting requirements, please reach out directly to your UPS point of contact.

You have reached the end of this section of the guidebook. If you receive multiple forms of support from The UPS Foundation, please [return to the navigation page](#) to access the other section(s) of the guidebook relevant to your organization.



Non-HELP Strategic Pillar Aligned Partners

Measurement and Reporting Requirements

Meetings



There are no required MEL meetings for non-HELP strategic pillar aligned partners.

Reports



Upon Completion

Completion Report

Comprehensive report (via survey link) that discusses project accomplishments, impacts, stories, lessons learned, and progress for output and outcome indicators.



Annual

GRI Indicator Report*

A very brief report on key indicators, such as lives impacted and number of trees planted.

Completion Report Form Details

The completion form submission is required once at the end of the funding cycle. The template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

The UPS Foundation requires reporting on specific output- and outcome-level indicators to enable aggregation at the portfolio level. However, The UPS Foundation also values the unique impact of each partner so includes room for partners to share any additional indicators that help to communicate their impact.

The form will request the following information:

Impact of The UPS Foundation support on intended beneficiaries

Key activities and milestones completed during the reporting period

The UPS Foundation-required output- and outcome-level indicators

Specific stories of impact (individual- and/or community-level) highlighting the program's positive impacts for beneficiaries

Feedback on TUPSF support

Partners who receive funding of \$15,000 or more are required to submit a GRI Indicator Report on an annual basis. This very brief report focuses on a calendar year (January 1 - December 31) and is due mid-December. The form template will be shared via survey link in an email from The UPS Foundation at least one month before the due date.

The form will request the following information:

lives positively impacted

vaccines delivered in-kind to countries in need, by kind/type

disasters responded to by location

countries reached by location

trees planted by location

female and small business owners connected to the global economy/acquired job readiness skills (in general and through UPS's Women Exporters Program)

young adults provided equitable access to academic support for college/career enrichment opportunities

exponential lives positively impacted (systems change work only)

Non-HELP Strategic Pillar Aligned Partners - Output Indicators

The following output indicators are required for partners not aligned with the TUPSF HELP strategic pillars. The UPS Foundation will provide a survey link for partners to input these indicators as needed. Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Output indicators for Non-HELP Strategic Pillar Aligned	Required v. Optional
Total # of lives impacted by location, low-to-moderate income, disability, and demographics	Required
Country(ies), states, priority market supported	Required
Unit cost/ average dollar cost of delivering a single unit of your service to an individual (\$USD)	Optional

Indicator Guidance: Lives Impacted

All partners of The UPS Foundation are asked to report on the indicator "total # lives impacted," which contributes to our goal of positively impacting one billion lives by 2040. We ask that partners report on the lives directly impacted in the work supported by The UPS Foundation partnership. As a general rule, you should not report on the total number of individuals in an affected geographic region, individuals served/trained through non-UPS funding, or media visits/views. We highly encourage you to review your methodology to avoid double counting; for example, if you count both the number of individuals trained and the number of individuals placed into jobs, please de-duplicate these numbers before reporting on the total lives impacted.

Examples of figures that are considered valid or invalid for inclusion in your reporting based on The UPS Foundation Program Activities are included in the [Appendix](#) to this guidebook.

For additional guidance or to discuss your proposed methodology for calculating lives impacted, please reach out to your UPS point of contact.

Organizational Capacity Building Indicators

The following outcome indicators are required based on the program activities funded. We are interested in understanding the impact of The UPS Foundation funding/support on partner organizations, in addition to the potential impact on beneficiaries. For each indicator below you will be asked to indicate to what extent The UPS Foundation support you received has helped you, with response options “not at all,” “very little,” “somewhat,” and “significantly.” Note: If an indicator is not relevant to your TUPSF-supported initiative, you may simply leave this field blank.

Organizational Capacity Building Indicators	Required v. Optional
Increased capacity for fundraising and capital development	Required
Ability to hire and/or retain qualified staff in all positions	Required
Ability to provide on-the-job training and learning opportunities to enhance staffs' program-related skills	Required
Ability to evaluate impact and make data-driven decisions	Required
Ability to implement new or innovative programs and/or expand existing programs	Required
Ability to incorporate principles related to equity and justice into program design or delivery	Required
Ability to create and test more innovative solutions or products	Required
Gained the knowledge or ability to carry out more technical or specialized work or to carry that work out more effectively.	Required



If you have questions or concerns about your Measurement and reporting requirements, please reach out directly to your UPS point of contact.

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Improved well-being

refers to beneficiaries reporting a positive change in their lives as a result of an intervention. This may include improved happiness/overall perceptions of well-being; healthy and growing children; home repairs; and/or preventing/rebuilding after disaster damage.



Impacted

refers to communities directly affected by disasters or other crises, including both natural disasters (e.g. hurricanes) and manmade disasters (e.g. civil conflict).



Resilience

refers to the capacity to withstand or to recover quickly from difficulties; toughness.



Underserved

refers to communities that face systemic and institutional barriers that prevent them from accessing resources and opportunities and are otherwise historically marginalized. This refers to low funding, limited access to healthcare and other essential services, high rates of poverty, and hard-to-reach geographies.



Civic mindedness

refers to having, showing, or actively carrying out one's concern for the condition and affairs of one's community.



Innovations

refer to the practical implementation of ideas that result in the introduction of new goods or services or improvement in offering goods or services.



Crisis

refers to a time of intense difficulty, trouble, or danger. This refers to both natural and manmade disasters.



Equity

refers to the promotion of justice and the guarantee of fair treatment, access, opportunity, and advancement for all. Additionally, this refers to the ongoing process of identifying and eliminating barriers within the procedures, processes, and distribution of resources by institutions or systems that have prevented the full participation of specific groups.



Justice

refers to the quality of being just, impartial, or fair.



Restored

refers to ecological restoration. It is the process of repairing sites in nature whose biological communities (that is, interacting groups of various species in a common location) and ecosystems have been degraded or destroyed.



Systems Change

refers to work focused on changing the ways in which systems function, including a focus on policy reform/passage; strengthening/increasing the quality and number of relationships among actors; shifting resource flows; engaging actors historically underrepresented and/or underserved; adopting activities and practices focused on improving social and environmental conditions; and shifting attitudes/mindsets.

Indicator Guidance: Lives Impacted

All partners of The UPS Foundation are asked to report on the indicator "total # lives impacted," which contributes to our goal of positively impacting one billion lives by 2040. We ask that partners report on the lives directly impacted in the work supported by The UPS Foundation partnership. As a general rule, you should not report on the total number of individuals in an affected geographic region, individuals served/trained through non-UPS funding, or media visits/views. We highly encourage you to review your methodology to avoid double counting; for example, if you count both the number of individuals trained and the number of individuals placed into jobs, please de-duplicate these numbers before reporting on the total lives impacted.

The following slides provide examples of figures that are considered valid or invalid for inclusion in your reporting based on The UPS Foundation Program Activities.

Indicator Guidance: Lives Impacted

Program Activities	Parameters	
	Valid	Invalid
Disaster Preparedness	<ul style="list-style-type: none"> Number of individuals provided with disaster preparedness services, resources, or education Number of individuals who adopt disaster readiness practices/report that they are prepared for a disaster 	<ul style="list-style-type: none"> Number of items shipped and/or distributed Number of visits/views of an online activity/resources (i.e. inferred impacts of web-based solutions and/or impressions or media interactions/views) Number of individuals in geographic areas served by participating organizations
Disaster Response	<ul style="list-style-type: none"> Number of impacted individuals/disaster survivors receiving essential services (e.g. food, shelter, healthcare) Number of business owners/workers who reopened/returned to work more quickly as a result of support 	<ul style="list-style-type: none"> Number of items shipped and/or distributed Number of disaster survivors in affected geographic area/served by non-UPS funding
Disaster Preparedness and Response - Training Activities	<ul style="list-style-type: none"> Number of individuals trained to support disaster preparedness and/or response Number of trainees who adopted disaster readiness practices/reported that they are prepared for a disaster Number of business owners/workers who reopened/returned to work more quickly as a result of support 	<ul style="list-style-type: none"> Number of trainees trained in the same program or institution by non-UPS funding Number of visits to/views of an online activity/resource (i.e. inferred impacts of web-based solutions and/or impressions or media interactions/views) Number of individuals in geographic areas served by participating organizations
Anti-Trafficking Training	<ul style="list-style-type: none"> Number of trainees trained through The UPS Foundation support/funding Number of individuals who report they are equipped to take action on, have situational awareness of, and/or understand the process for reporting suspected human trafficking 	<ul style="list-style-type: none"> Number of trainees trained in the same program or institution by non-UPS funding Number of visits to/views of an online activity/resource (i.e. inferred impacts of web-based solutions and/or impressions or media interactions/views)
Services to Survivors of Trafficking	<ul style="list-style-type: none"> Number of survivors of trafficking receiving essential services and/or restorative/support services Number of survivors of trafficking participating in training, internships, or hands-on experiences Number of survivors of trafficking placed into a job and/or transitioning to continued education Number of survivors with improved mental health scores 	<ul style="list-style-type: none"> Number of survivors of trafficking served through non-UPS funding

Program Activities	Parameters	
	Valid	Invalid
Research and innovation	Number of individuals directly served by research/innovation (e.g. recipients of vaccines enabled through cold chain solutions)	Number of individuals who may be impacted by research/innovation in the future Number of individuals engaged in research/innovation (e.g. research fellows)
Other Health and Humanitarian Activities	Number of unique individuals receiving meals due to TUPSF funding or transportation Number of unique individuals receiving vaccines, medications, or other forms of health care Number of unique individuals receiving supplies or essential services Number of individuals with improved hunger index, wellbeing, health, or resilience scores	Number of meals served or items distributed Average number of visitors in a year/week/etc.
Workforce and Leadership Development	Number of trainees trained through The UPS Foundation support/funding Number of individuals participating in internship or hands-on experiences Number of individuals placed into a job and/or transitioning to continued education Number of individuals who advanced their career, transitioned to a new job, and/or retained jobs	Number of trainees trained in the same program or institution by non-UPS funding Number of visits to/views of an online activity/resource (i.e. inferred impacts of web-based solutions and/or impressions or media interactions/views)

Program Activities	Parameters	
	Valid	Invalid
SME/SMB Support	<ul style="list-style-type: none"> Number of small businesses directly supported through The UPS Foundation support Number of small business owners whose businesses scaled up/experienced increased revenue Number of employees hired/retained as a result of SME/SMB support Number of trainees trained through The UPS Foundation support/funding Number of recipients of microloans, seed funding, or other loans 	<ul style="list-style-type: none"> Number of trainees trained in the same program or institution by non-UPS funding Number of visits to/views of an online activity/resource (i.e. inferred impacts of web-based solutions and/or impressions or media interactions/views)
Education	<ul style="list-style-type: none"> Number of participants in educational activities Number of individuals receiving support services Number of individuals placed into a job and/or transitioning to continued education 	<ul style="list-style-type: none"> Number of individuals participating in the same program or institution by non-UPS funding Number of visits to/views of an online activity/resource (i.e. inferred impacts of web-based solutions and/or impressions or media interactions/views)
Scholarships	<ul style="list-style-type: none"> Number of scholarship recipients who received scholarships through The UPS Foundation support/funding 	<ul style="list-style-type: none"> Number of individuals in the geographic area or demographic group served by scholarships
Advocacy	<ul style="list-style-type: none"> Number of individuals attending meetings, assemblies, and advocacy events Number of individuals directly receiving information through advocacy efforts 	<ul style="list-style-type: none"> Number of visits to/views of an online activity/resource (i.e. inferred impacts of web-based solutions and/or impressions or media interactions/views) Number of individuals donating to support the initiative Number of elected officials supporting the campaign Number of exponential lives impacted (e.g. number of people potentially affected by policy changes)
Other Equity and Economic Empowerment Activities	<ul style="list-style-type: none"> Number of individuals with improved well-being, financial well-being, resilience, and/or perceptions of neighborhood safety 	<ul style="list-style-type: none"> Number of items distributed or loans provided Number of individuals in the geographic area or demographic group served

Program Activities	Parameters	
	Valid	Invalid
Volunteerism	Number of individuals directly served through The UPS Foundation supporting volunteering (e.g. individuals receiving meals, lawn care assistance, etc.)	Number of UPS employees, friends, family, or other volunteers engaged in volunteering activities
Tree Planting Training Activities	Number of trainees trained through The UPS Foundation support/funding	Number of trainees trained in the same program or institution by non-UPS funding Number of visits to/views of an online activity/resource (i.e. inferred impacts of web-based solutions and/or impressions or media interactions/views) Number of individuals located in geographic areas in which trees are planted
Employment Related to Tree Planting	Number of individuals hired for tree planting initiatives directly funded through The UPS Foundation support	Number of individuals hired for tree planting initiatives through non-UPS funding Number of individuals located in geographic areas in which trees are planted
Organizational Capacity Building	Number of individuals served due to increased organizational capacity made possible through The UPS Foundation support	Total number of individuals served by the organization Number of individuals on staff within the organization
Systems Change	Number of individuals directly engaged in systems change efforts, such as individuals engaged in leadership/decision-making	Number of exponential lives impacted (e.g. number of people potentially affected by policy changes) Number of individuals within affected geographic areas/demographic groups

Measurement and Reporting Requirements for TUPSF Partners – Single Year Partnership

Funding Category	MEL Kick-Off Meeting	Partnership Status and Indicator Update	Partnership Status Meeting	GRI Indicator Report	Completion Report	Completion Meeting	Post-Completion Follow-Up	Third-Party Impact Evaluation
Partnership Type: Direct Programming Grant, In-kind: Logistics/Delivery, In-kind: On-Loan Executives								
Community or Signature Partner (\$499k and below)	Not Required	Not Required	Not Required	Required (in December)	Required once (end of funding cycle)	Not Required	Variable	Not Required
Corporate Partner (\$500k+)	Required	Required once (6 months post-project start date)	Required once (6 months post-project start date)	Required (in December)	Required once (end of funding cycle)	Required once (end of funding cycle)	Variable	Variable
Priority Market (less than \$100K)	Required	Not Required	Not Required	Required (in December)	Required once (end of funding cycle)	Required once (end of funding cycle)	Variable	Variable
Priority Market (\$100K+)	Required	Required once** (6 months post-project start date)	Required once (6 months post-project start date)	Required (in December)	Required once (end of funding cycle)	Required once (end of funding cycle)	Variable	Variable
Partnership Type: Sponsorships, Volunteerism								
All Values	Not Required	Not Required	Not Required	Not Required	Required once (end of funding cycle)	Not Required	Not Required	Not Required
Partnership Type: Scholarships, Endowments - Scholarships								
All Values	Variable	Not Required	Not Required	Not Required	Required once (end of funding cycle)	Not Required	Variable	Not Required

*Variable requirement is context-dependent. TUPSF will notify the organization if applicable.

Note: Please refer to the project start date indicated in Versaic applicaiton for the above reporting guidelines.

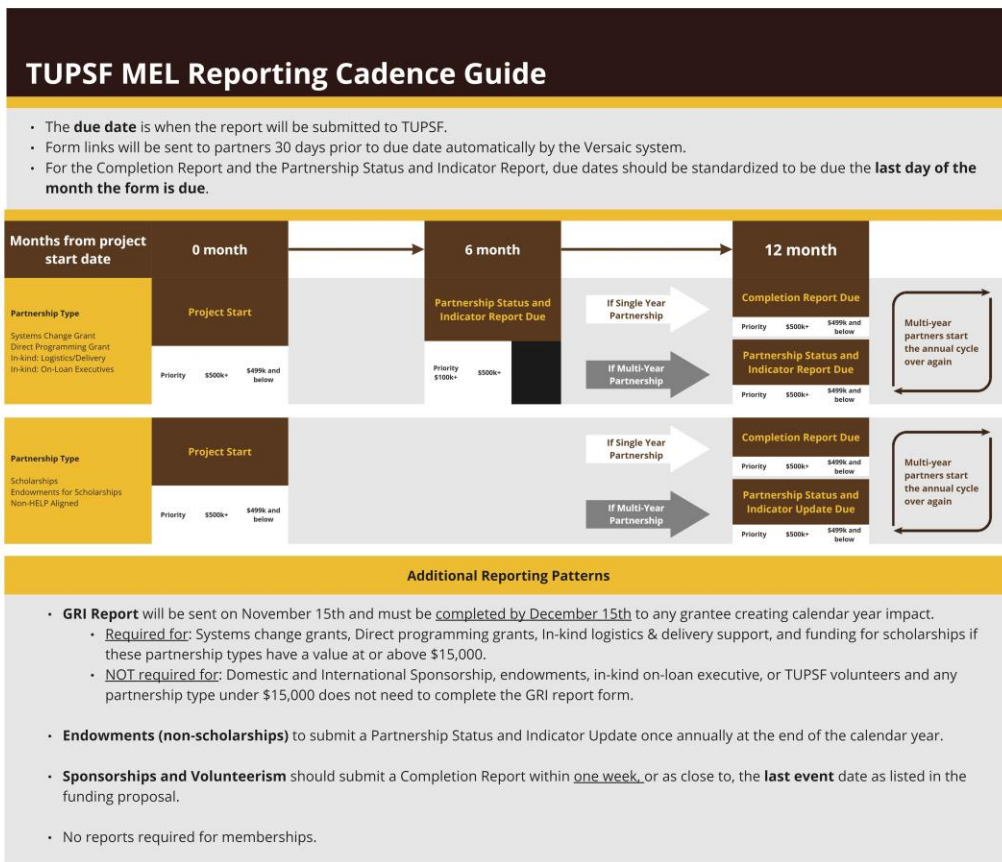
Measurement and Reporting Requirements for TUPSF Partners – Multi-Year Partnership

Funding Category	MEL Kick-Off Meeting	Partnership Status and Indicator Update	Partnership Status Meeting	GRI Indicator Report	Completion Report	Completion Meeting	Post-Completion Follow-Up	Third-Party Impact Evaluation
Partnership Type: Systems Change Grant, Direct Programming Grant, In-kind: Logistics/Delivery, In-kind: On-Loan Executives								
Community or Signature Partner (\$499k and below)	Not Required	Required annually (Every 12 months post-project start date)	Not Required	Required annually (Every December)	Required (End of funding cycle)	Not Required	Variable	Not Required
Corporate Partner (\$500k+)	Required	Required bi-annually (Every 6 months post-project start date)	Required bi-annually (Every 6 months post-project start date)	Required annually (Every December)	Required (End of funding cycle)	Required (End of funding cycle)	Variable	Variable
Priority Market (less than \$100k)	Required	Required annually (Every 12 months post-project start date)	Required annually (Every 12 months post-project start date)	Required annually (Every December)	Required (End of funding cycle)	Required (End of funding cycle)	Variable	Variable
Priority Market (\$100k+)	Required	Required bi-annually (Every 6 months post-project start date)	Required bi-annually (Every 6 months post-project start date)	Required annually (Every December)	Required (End of funding cycle)	Required (End of funding cycle)	Variable	Variable
Partnership Type: Sponsorships, Volunteerism								
All Values	Not Required	Not Required	Not Required	Not Required	Required (End of funding cycle)	Not Required	Not Required	Not Required
Partnership Type: Endowments - Other								
All Values	Not Required	Required annually (Every 12 months post-project start date)	Not Required	Not Required	Not Required	Not Required	Not Required	Not Required
Partnership Type: Scholarships, Endowments- Scholarships								
All Values	Variable	Required annually (Every 12 months post-project start date)	Not Required	Not Required	Required (End of funding cycle)	Not Required	Variable	Not Required

**Variable requirement is context-dependent. TUPSF will notify the organization if applicable.*

Note: Please refer to the project start date indicated in Versaic application for the above reporting guidelines.

Refer to the visual to the right for guidance on reporting requirements and timing. Reach out to your TUPSF Point of Contact with any additional questions.



Budget Categories

In addition to collecting output and outcome indicators, partners should also report actual grant spending by any of the major categories (right) that are relevant to the partnership. It is expected that some partnerships will only have a single spending category.

Direct Programming (*training, services, etc.*)

Program Operating Funds / Administration

Administrative Fees (*e.g., fiscal sponsorship fees*)

Loans

Grants/Scholarships

Fundraising

Other

Sustainable Development Goals (SDG)

In addition to collecting output and outcome indicators, partners should also report Sustainable Development Goals supported (right) that are relevant to the partnership.

SDG 1: No Poverty

SDG 2: Zero Hunger

SDG 3: Good Health and Well-being

SDG 4: Quality Education

SDG 5: Gender Equality

SDG 6: Clean Water and Sanitation

SDG 7: Affordable and Clean Energy

SDG 8: Decent Work and Economic Growth

SDG 9: Industry/Innovation and Infrastructure

SDG 10: Reduced Inequalities

SDG 11: Sustainable Communities and Cities

SDG 12: Responsible Consumption and Production

SDG 13: Climate Action

SDG 14: Life Below Water

SDG 15: Life on Land

SDG 16: Peace, Justice, and Strong Institutions

SDG 17: Partnerships for the Goals

Demographic Breakdowns Requested

Race

**For partners with beneficiaries in the US only*

American Indian or Alaska Native

East Asian/Asian American

South Asian/Asian American

Black or African American

Hispanic and Latino/a/x

Middle Eastern or North African

Native Hawaiian or other Pacific Islander

White

Multiracial

Other not listed

Preferred not to answer

Not tracked

Note: This is a non-exhaustive list and those with racial/ethnic identities not explicitly listed may identify as "Other not listed" if none of the listed categories feel appropriate.

Age

0-13 years

14-24 years

25-64 years

65+ years

Preferred not to answer

Not tracked

Gender (1)

Men
Women
Non-binary
Intersex
Other not listed
Prefer not to answer
Not tracked

Note: This is a non-exhaustive list and those with gender identities not explicitly listed (e.g. genderqueer, two-spirit) may identify as "Other not listed" if none of the listed categories feel appropriate.

Gender (2)

**Optional*

Transgender
Not tracked

Note: Transgender Identity is optionally requested in addition to Gender Identity to ensure that the categories "men" and "women" encompass all those who identify with these identities, without a dichotomy between cisgender and transgender men and women. This also facilitates greater clarity for data interpretation.

Sexual Orientation

**Optional*

Bisexual
Gay
Lesbian
Straight/heterosexual
Other not listed
Prefer not to answer
Not tracked

Note: This is a non-exhaustive list and those with sexual orientations not explicitly listed (e.g. pansexual, asexual) may identify as "Other not listed."

Equity and Justice Considerations

The UPS Foundation is committed to equity and justice. If your organization is tracking data disaggregated by marginalized and underserved communities in ways that are not effectively captured by demographics categories asked for in formal reporting, we encourage you to share the data you do have with your UPS point of contact. The UPS Foundation welcomes any notes from your organization on what reasonable accommodations or adjustments have been made in your program delivery to better support such populations, as well as suggestions to improve the Diversity, Equity, and Inclusion (DEI) considerations throughout this guidebook.

Marginalized:

Marginalization occurs in different ways in different contexts. Those who have historically been marginalized in many contexts include: persons with disabilities, youth; women; lesbian, gay, bisexual, transgender and intersex people; members of minority groups; indigenous people; internally displaced persons; and non-national, including refugees, asylum seekers and migrant workers.

Underserved:

Those who are underserved face systemic and institutional barriers that prevent them from accessing and/or receiving the same resources and opportunities as people not facing those barriers.

Underserved Youth/Students:

Underserved students are defined as students who have inequitable access to resources when compared to other students in the academic pipeline. Typically, these groups of students include low-income, underrepresented racial/ethnic minorities, and first generation.

Adapted from
collegeboard.org Bridging the Gap.

Demographic Breakdowns Requested: Definitions of Terms

Term	Definition	Source(s)
Men	"An adult who lives and identifies as male, though they may have been said to have a different sex at birth" Note that this term is inclusive of cisgender and transgender men.	Cambridge Dictionary
Women	"An adult who lives and identifies as female, though they may have been said to have a different sex at birth" Note that this term is inclusive of cisgender and transgender women.	Cambridge Dictionary
Non-binary	"An adjective describing a person who does not identify exclusively as a man or a woman. Non-binary people may identify as being both a man and a woman, somewhere in between, or as falling completely outside these categories. While many also identify as transgender, not all non-binary people do."	HRC
Intersex	"An adjective used to describe a person with one or more innate sex characteristics, including genitals, internal reproductive organs, and chromosomes, that fall outside of traditional conceptions of male or female bodies."	GLAAD
Transgender	An umbrella term for people whose gender identity and/or expression is different from cultural expectations based on the sex they were assigned at birth (e.g., someone who was assigned male at birth, but does not identify as a man)	ACLU HRC
Bisexual	"An adjective used to describe a person who has the potential to be physically, romantically, and/or emotionally attracted to people of more than one gender, not necessarily at the same time, in the same way, or to the same degree."	GLAAD
Gay	"An adjective used to describe a person whose enduring physical, romantic, and/or emotional attractions are to people of the same sex (e.g., gay man, gay people). Sometimes lesbian (n. or adj.) is the preferred term for women."	GLAAD
Lesbian	"A woman whose enduring physical, romantic, and/or emotional attraction is to other women. Some lesbians may prefer to identify as gay (adj.) or as gay women."	GLAAD
Straight/heterosexual	An adjective used to describe a person whose enduring physical, romantic, and/or emotional attraction is to people of a sex different than their own.	GLAAD
Other not listed	The lists of sexual orientations and gender identities above is non-exhaustive. Individuals who identify as asexual, pansexual, etc., may feel their identities are best represented by selecting "other not listed."	

Demographic Breakdowns Requested: Definitions of Terms

Term	Definition	Source(s)
American Indian or Alaska Native	A person having origins in any of the original peoples of North and South America (including Central America) and who maintains tribal affiliation or community attachment. This category includes people who indicate their race as "American Indian or Alaska Native" or report entries such as Navajo Nation, Blackfeet Tribe, Mayan, Aztec, Native Village of Barrow Inupiat Traditional Government, or Nome Eskimo Community.	U.S. Census Bureau
East Asian/Asian American	Individuals with origins in East Asia, which includes but is not limited to the following countries: China, Korea, Japan, Okinawa, Taiwan, and Mongolia.	CSU
South Asian/Asian American	Individuals with origins in South Asia, which includes but is not limited to the following countries: Bangladesh, Bhutan, India, the Maldives, Nepal, Pakistan, and Sri Lanka. Ethnic groups include Sindhi, Gujarati, Punjabi, Tamil, and many others.	CSU
Black or African American	A person having origins in any of the Black racial groups of Africa, which includes but is not limited to those who are Jamaican, Haitian, Nigerian, Ethiopian, or Somali. The category also includes groups such as Ghanaian, South African, Barbadian, Kenyan, Liberian, Bahamian, etc., in descent.	U.S. Census Bureau
Hispanic and Latino/a/x	Any person of Cuban, Mexican, Puerto Rican, South or Central American, or other Spanish culture or origin, regardless of race	HHS
Middle Eastern or North African	Individuals with Middle Eastern or North African (MENA) origins, with the MENA region spanning from Atlantic coast of Africa to the borders of Pakistan and Afghanistan, and from the Mediterranean to the southern boundaries of the Sahara Desert.	IME
Native Hawaiian or other Pacific Islander	A person having origins in any of the original peoples of Hawaii, Guam, Samoa, or other Pacific Islands. It includes people who indicate their race as "Native Hawaiian," "Chamorro," "Samoan," and "Other Pacific Islander" or provide other detailed Pacific Islander responses such as Palauan, Tahitian, Chuukese, Pohnpeian, Saipanese, Yapese, etc.	U.S. Census Bureau
White	A person having origins in any of the original peoples of Europe, which includes but is not limited to those who are German, Irish, English, Italian, Polish, French, etc., in descent.	U.S. Census Bureau
Multiracial	Having parents, grandparents, or great-grandparents of different races.	Cambridge Dictionary
Other Not Listed	The list of racial and ethnic identities above are non-exhaustive. A person whose ethnic or racial identity are not effectively captured by the provided categories may select "Other Not Listed"	

Proposed Indicators

Health & Humanitarian Relief

Improves the well-being of people and communities by leveraging partnerships and innovative logistical expertise to deliver health and humanitarian solutions to underserved and impacted communities.

Expected Long-Term Impact

Improved well-being of beneficiaries in underserved and impacted communities by increasing access to life-sustaining food, medicine, and vaccines.

Increased capacity of humanitarian agencies to serve more of those most in need

Increased action toward disaster preparedness and resilience of individuals, businesses, and communities.

Goals and Objectives:

H1: Improve the well-being of 50 million beneficiaries in underserved and impacted communities each year.

H2: Develop and incubate supply chain innovation for 1 million beneficiaries who receive essential medicines, and humanitarian supplies.

H3: Combat human trafficking through situational awareness trainings for 100,000 beneficiaries annually.

H4: Increase disaster resiliency by providing training and tools to enhance preparedness annually for 50,000 individuals, communities, and businesses.

Inputs	Total \$ funding, in-kind, and technical support	Total value (\$) of shipments/deliveries	# pounds of relief delivered	\$ invested in health/humanitarian research and innovation	Hours of labor dedicated to vaccine equity work	
Outputs (Required)	Total # lives impacted, by location, low-to-moderate income and demographics Country(ies), states, priority market supported # of disaster survivors receiving essential services	# of crisis(es) supported Name of disaster or humanitarian crises this shipment supported	# supplies delivered (by supply type e.g. food, vaccines (further breakdown by type), medicine) # of preparedness tools developed # of survivors receiving essential services	# of training sessions conducted # of individuals received training Was this training virtual or in person Length of the training provided (in hours) Training completion rate (%)	# of UPS drivers who received anti-trafficking training # of UPS drivers who are trained as anti-trafficking trainers (TTT) # training sessions supported by UPS drivers and other drivers # of preparedness shipments or prepositioning	# individuals who received training supported by UPS driver # of trafficking survivors participating in TUPSF-supported internships and other hands-on experiences # of trafficking survivors receiving workforce readiness training open-ended: Tell us about the innovation-focused work that TUPSF support enabled
	# of trafficking survivors receiving essential services	# of recovery shipments	# of trafficking survivors engaged in restorative/support services such as individual counseling or group therapy			
	# of preparedness tools accessed	# individuals who received training due to UPS in-kind transportation				
	# of deliveries completed					
Outputs (Optional)	NPS for anti-trafficking training/workforce readiness training/restorative services	# of vaccines and medicines delivered by ministries of health and other organizations due to the logistics or supply chain optimization UPS put in place (by type)		Unit cost/ average dollar cost of delivering a single unit of your service to an individual (\$USD)		

Proposed Indicators

Health & Humanitarian Relief

Improves the well-being of people and communities by leveraging partnerships and innovative logistical expertise to deliver health and humanitarian solutions to underserved and impacted communities.

Expected Long-Term Impact

Improved well-being of beneficiaries in underserved and impacted communities by increasing access to life-sustaining food, medicine, and vaccines.

Increased capacity of humanitarian agencies to serve more of those most in need

Increased action toward disaster preparedness and resilience of individuals, businesses, and communities.

Beneficiary Outcomes (Required)

facilities/clinics providing immunizations with functioning cold chain

of agencies/organizations adopting collaborative /integrated protocols

Emergency preparedness plans in place or improved

of trafficking survivors placed into a job by demographics and location

Stories of impact by city/country.

truckers who understand the process for reporting suspected human trafficking (trucker survey)

truckers who completed the post-training survey

truckers who believe they are equipped to take action when see suspected human trafficking (trucker survey)

truckers who report they have the situational awareness to identify human trafficking (trucker survey)

of points of access for better health outcomes that TUPSF support enabled

Beneficiary Outcomes (Optional)

% change in hunger index score (pre/post program) ex: Fanta index

% change in beneficiaries' resilience score (as measured by the Brief Resilience Scale)

% change in career readiness scores (as measured by the Career Resources Questionnaire)

% change in beneficiaries' self-rated health score

% businesses that reopen after a disaster

of individuals/ businesses/ communities that report they adopted disaster readiness practices

Results of third-party capacity assessments (e.g. OCHA)

% of agencies/organizations with activities/plans to address gender-based violence and trafficking

Survivor mental health score post-services

% survivor recidivism

of individuals/ businesses/ communities that report they are prepared for a disaster

% of agencies/organizations with activities/plans to assist vulnerable migrants

% of agencies/organizations with rapid response teams organized, trained, and equipped with multi-hazard approach

open-ended: Tell us about adoption or utilization of innovative solutions driven by your TUPSF-supported work.

% change in beneficiaries' well-being score (as measured by the WHO-5 or similar)

Open-ended: Tell us about a business that reopened after a disaster with your support

of survivors of trafficking that transitioned to continuing education

Goals and Objectives:

H1: Improve the well-being of 50 million beneficiaries in underserved and impacted communities each year.

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Proposed Indicators

Health & Humanitarian Relief

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Expected Long-Term Impact

Improved well-being of beneficiaries in underserved and impacted communities by increasing access to life-sustaining food, medicine, and vaccines.

Increased capacity of humanitarian agencies to serve more of those most in need

Increased action toward disaster preparedness and resilience of individuals, businesses, and communities.

Capacity Building

Ability to hire and/or retain qualified staff in all positions

Ability to provide on-the-job training and learning opportunities to enhance staff's program-related skills

Increased capacity for fundraising and capital development

Ability to implement new or innovative programs and/or expand existing programs

Ability to incorporate principles related to equity into program design and delivery

Ability to create and test more innovative solutions and products

Gained the knowledge or ability to carry out more technical or specialized work or to carry that work out more effectively

Stories of impact

Ability to evaluate impact and make data-driven decisions

Internal Indicators

solutions tested at TUPSF scaled to corporation

Systems Impact

Distressed Communities Index

% change in disease prevention score Ex: Global Health Security (GHS) Index

Results of disaster preparedness assessment (e.g. INFORM; SENDAI; Preparedness Index for Health Emergencies and Disasters)

General government expenditure on health as a percentage of total government expenditure

Per capita total expenditure on health

Goals and Objectives:

H1: Improve the well-being of 50 million beneficiaries in underserved and impacted communities each year.

H2: Develop and incubate supply chain innovation for 1 million beneficiaries who receive essential medicines, and humanitarian supplies.

H3: Combat human trafficking through situational awareness trainings for 100,000 beneficiaries annually.

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Proposed Indicators

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Increased capacity of humanitarian agencies to serve more of those most in need

Increased action toward disaster preparedness and resilience of individuals, businesses, and communities.

Systems Change

of exponential lives positively impacted

Open-ended: Please explain your methodology to calculate exponential lives positively impacted

Impact of The UPS Foundation support on the main levers of systems change

of laws or pieces of legislation that have been adopted, improved, and/or implemented through the contributions of your TUPSF support

Open-ended: How has your work contributed to or guided the policy change process for key systems change policies?

Open-ended: How many administrative or organizational policies/ rules have been adopted that your work contributed to?

Open-ended: What other actors did you collaborate with in order to build momentum for policy reform?

Open-ended: How did your targeted populations benefit from the policy changes your work supported?

Open-ended: Describe the creation and implementation of your improved practice(s), why these were necessary, and how they were identified as appropriate solutions

Open-ended: How has your work contributed to the increased adoption of best practices and encouraged the independent replication of your idea? i.e. How have you shaped or built the field?

Open-ended: How has your work facilitated the distribution of knowledge and information within the system?

Open-ended: How has your work helped the reallocation of resources flow into the system?

% change in funding/staffing/ resources/knowledge that your work helped support

Open-ended: How has your work facilitated connectivity between key actors in the system?

Open-ended: How has your contribution helped the movements grow in participation, reach, voice, and platform?

Self-rating: How connected your organization feels to the other actors working towards this system's change

Asses the level of participation (participation ladder) in your programming work by the following groups you serve

Rate to what extent members of underserved/ underrepresented groups/community members are involved in specific tasks listed

Open-ended: How is your work including local community members in decision making?

Open-ended: How has your work guided shifts in attitudes/ mental models/ public narratives and why does this matter? I.e., what levers are you pulling to try and influence the conversation more broadly and build demand?

Goals and Objectives:

H1: Improve the well-being of 50 million beneficiaries in underserved and impacted communities each year.

H2: Develop and incubate supply chain innovation for 1 million beneficiaries who receive essential medicines, and humanitarian supplies.

H3: Combat human trafficking through situational awareness trainings for 100,000 beneficiaries annually.

H4: Increase disaster resiliency by providing training and tools to enhance preparedness annually for 50,000 individuals, communities, and businesses.

Proposed Indicators

Equity & Economic Empowerment

Invests in organizations that address systemic education and economic barriers and create opportunities for underserved & underrepresented women, youth, and marginalized communities.

Expected Long-Term Impact

Positioned UPS as a leader in Equity and Economic Empowerment for underserved and underrepresented marginalized communities.

Increased well-being, resilience, and safety of underserved and underrepresented marginalized communities.

Increased education, leadership, and workforce opportunities for underserved youth.

E1: Double philanthropic investment and volunteerism in Atlanta to support equity, SME/SMB, workforce development, and community safety.

E2: 7,500 educational scholarships for first-generation college students from low-income households.

E3: 1,000 youth in the UPS workforce pipeline for professional and operation positions.

E4: 5,000 underserved youth receive leadership development training and mentorship.

E5: 25,000 women entrepreneurs receive training and micro loans to build and sustain their businesses.

Inputs	Total amount of funding towards:	Total \$ allocated to Atlanta-focused programs	# of UPS staff that volunteered in Atlanta
	1) workforce readiness/ development initiatives		
	2) entrepreneurship programs and initiatives for youth		
	3) educational initiatives, systemic change, policy and advocacy efforts.	Total amount (\$) in scholarships distributed	# of UPS volunteer hours logged in Atlanta

Outputs (Required)	Total # lives impacted, by location, low-to-moderate income and demographics	# of individuals who received trainings(disaggregated by workforce readiness v. leadership and gender)	# and \$ value of microloans, small business loans, and seed funding distributed to businesses	# of individuals participated in TUPSF-supported internships and other hands-on experiences
	Total # of individuals receiving support services	# of training sessions conducted	# of recipients of microloans, small business loans, and seed funding by gender	# of individuals provided scholarships by demographics, low-to-moderate income, 1st gen college student, institution type (2/4 yr/credentialing institutions)
	Country(ies), states, priority market supported	Was the training virtual or in person	Training completion rate (%)	Average revenue (\$USD) of small businesses supported
	# of businesses supported, by demographics of business owner	Length of training provided (in hours)	# of workers placed into a job, by gender	# and \$ value of microloans, small business loans, and seed funding distributed to women owned businesses
	# individuals who participated in mentorships	Open-ended: Explanation of how key issue area(s) were identified and defined	Total # of employees of small businesses supported	
	# of organizations attending meetings/assemblies around issue(s) of focus	# of participants at advocacy events		
	Open-ended: explanation of how key issue area(s) were identified and defined			

Proposed Indicators

Equity & Economic Empowerment

Invests in organizations that address systemic education and economic barriers and create opportunities for underserved & underrepresented women, youth, and marginalized communities.

Expected Long-Term Impact

Positioned UPS as a leader in Equity and Economic Empowerment for underserved and underrepresented marginalized communities.

Increased well-being, resilience, and safety of underserved and underrepresented marginalized communities.

Increased education, leadership, and workforce opportunities for underserved youth.

E1: Double philanthropic investment and volunteerism in Atlanta to support equity, SME/SMB, workforce development, and community safety.

E2: 7,500 educational scholarships for first-generation college students from low-income households.

E3: 1,000 youth in the UPS workforce pipeline for professional and operation positions.

E4: 5,000 underserved youth receive leadership development training and mentorship.

E5: 25,000 women entrepreneurs receive training and micro loans to build and sustain their businesses.

Outputs (Optional)

Average Net Promoter Score (NPS) for training, mentorship, education and microloan, small business loan, and seed funding programs.

new training modules developed

of small businesses supported with e-commerce model

Total hrs. Of advisory services/training/capacity building activities/ technical assistance provided to small businesses

of scholarships that went to a HBCU

of businesses supported, by industry

of scholarship recipients by major

of individuals targeted with information about issue(s) of focus

scholarship recipients in good standing at their education institution (minimum 3.0 GPA)

of additional financial services/ products developed or new partnerships established to improve resource flows to women entrepreneurs

of microloans, small business loans, and seed funding by purpose

Unit cost/ average dollar cost of delivering a single unit of your service to an individual (\$USD)

Proposed Indicators

Equity & Economic Empowerment

Invests in organizations that address systemic education and economic barriers and create opportunities for underserved & underrepresented women, youth, and marginalized communities.

Expected Long-Term Impact

Positioned UPS as a leader in Equity and Economic Empowerment for underserved and underrepresented marginalized communities.

Increased well-being, resilience, and safety of underserved and underrepresented marginalized communities.

Increased education, leadership, and workforce opportunities for underserved youth.

E1: Double philanthropic investment and volunteerism in Atlanta to support equity, SME/SMB, workforce development, and community safety.

Beneficiary Outcomes (Required)	Indicator 1	Indicator 2	Indicator 3	Indicator 4	Indicator 5
# of workers placed into a job by demographics and location	# of individuals placed into a job that provides health insurance benefits	# of businesses reported increased revenue based on the support provided by TUPSF	% change in leadership self-efficacy (pre-/post-program)	# of scholarship recipients that graduated by demographics low-to-moderate income, 1st gen college student, institution type (2/4 yr/credentialing institutions)	
# of individuals hired who were previously unemployed	% change in beneficiaries' well-being score as measured by the WHO-5 or similar.	# of supported individuals who transition to employment/ further education	# of supported individuals who transition to employment / further education	Stories of impact by city/country	
# of individuals placed into a part-time job	# of businesses scaled up as a result of TUPSF support by business owner demographics	# of jobs created	% change in entrepreneurial self-efficacy (pre/post program)	# of new champions/advocates recruited, including new constituencies represented	
# of individuals placed into a full-time job	# of litigation(s) in favor of the program's position	# of supported youth who transition to employment/ further education	# of elected officials who publicly support the campaign		
# of organizations actively involved in coalition around issue of focus	% of women involved in making major household decisions	Graduation rate for participants			
% of women who report confidence in using financial products or services		# of female small business owners in your program that are connected to the global economy			

E2: 7,500 educational scholarships for first-generation college students from low-income households.

E3: 1,000 youth in the UPS workforce pipeline for professional and operation positions.

E4: 5,000 underserved youth receive leadership development training and mentorship.

E5: 25,000 women entrepreneurs receive training and micro loans to build and sustain their businesses.

Proposed Indicators

Equity & Economic Empowerment

Invests in organizations that address systemic education and economic barriers and create opportunities for underserved & underrepresented women, youth, and marginalized communities.

Expected Long-Term Impact

Positioned UPS as a leader in Equity and Economic Empowerment for underserved and underrepresented marginalized communities.

Increased well-being, resilience, and safety of underserved and underrepresented marginalized communities.

Increased education, leadership, and workforce opportunities for underserved youth.

Beneficiary Outcomes (Optional)

Average change in financial well-being for beneficiaries within 12 mos. of program completion (pre-/post-intervention) (Based on CFPB financial well-being score or equivalent)

of supported individuals who transitioned from one job to another as a result of program participation

of scholarship recipients that have a job 6 months post graduation, by demographics

% change in beneficiaries' resilience score (as measured by the Brief Resilience Scale)

% change in beneficiary wages within 12 months of program completion (pre-/post-intervention) by demographics

of supported individuals who retain their job for 6 months or more after starting

% change in well-being score

of individuals who report greater confidence in their jobs-related skills or abilities

% change in beneficiaries' perception of neighborhood safety

of supported individuals who advanced their career within 12 months of program completion

of micro businesses that reported increased revenue based on the support provided by TUPSF

% change in career readiness scores (as measured by the Career Resources Questionnaire)

of supported individuals who report that they are able to cover their rent/mortgage with their current income

% change in leadership self-efficacy (pre-/post-intervention), by gender

% of target audience who believe that the issue is important to them

of individuals providing donations to support the initiative

% of desired actions taken by government agency(ies)

E1: Double philanthropic investment and volunteerism in Atlanta to support equity, SME/SMB, workforce development, and community safety.

E2: 7,500 educational scholarships for first-generation college students from low-income households.

E3: 1,000 youth in the UPS workforce pipeline for professional and operation positions.

E4: 5,000 underserved youth receive leadership development training and mentorship.

E5: 25,000 women entrepreneurs receive training and micro loans to build and sustain their businesses.

Proposed Indicators

Equity & Economic Empowerment

Invests in organizations that address systemic education and economic barriers and create opportunities for underserved & underrepresented women, youth, and marginalized communities.

Expected Long-Term Impact

Positioned UPS as a leader in Equity and Economic Empowerment for underserved and underrepresented marginalized communities.

Increased well-being, resilience, and safety of underserved and underrepresented marginalized communities.

Increased education, leadership, and workforce opportunities for underserved youth.

E1: Double philanthropic investment and volunteerism in Atlanta to support equity, SME/SMB, workforce development, and community safety.

Capacity Building

Ability to hire and/or retain qualified staff in all positions

Ability to provide on-the-job training and learning opportunities to enhance staff's program-related skills

Increased capacity for fundraising and capital development

Ability to implement new or innovative programs and/or expand existing programs

Ability to incorporate principles related to equity into program design and delivery

Ability to create and test more innovative solutions and products

Gained the knowledge or ability to carry out more technical or specialized work or to carry that work out more effectively

Stories of impact

Ability to evaluate impact and make data-driven decisions

E2: 7,500 educational scholarships for first-generation college students from low-income households.

Internal Indicator

Org engaged UPS team directly for participation in relevant conferences/ events on issues of Equity and Economic Empowerment (speak/co-host)

Org highlighted UPS support as contributing to education or economic equity in external publications, presentations, etc. *(attach materials)*

Influence Score (media scan)

E3: 1,000 youth in the UPS workforce pipeline for professional and operation positions.

Systems Impact

Unemployment & underemployment rates

Median household income

Poverty rate

Distressed Communities Index

E4: 5,000 underserved youth receive leadership development training and mentorship.

E5: 25,000 women entrepreneurs receive training and micro loans to build and sustain their businesses.

Proposed Indicators

Equity & Economic Empowerment

Invests in organizations that address systemic education and economic barriers and create opportunities for underserved & underrepresented women, youth, and marginalized communities.

Expected Long-Term Impact

Positioned UPS as a leader in Equity and Economic Empowerment for underserved and underrepresented marginalized communities.

Increased well-being, resilience, and safety of underserved and underrepresented marginalized communities.

Increased education, leadership, and workforce opportunities for underserved youth.

E1: Double philanthropic investment and volunteerism in Atlanta to support equity, SME/SMB, workforce development, and community safety.

Systems Change

of exponential lives positively impacted

Open-ended: Please explain your methodology to calculate exponential lives positively impacted

Impact of The UPS Foundation support on the main levers of systems change

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Self-rating: How connected your organization feels to the other actors working towards this system's change

Asses the level of participation (participation ladder) in your programming work by the following groups you serve

Rate to what extent members of underserved/ underrepresented groups/community members are involved in specific tasks listed

Open-ended: How is your work including local community members in decision making?

Open-ended: How has your work guided shifts in attitudes/ mental models/ public narratives and why does this matter? I.e., what levers are you pulling to try and influence the conversation more broadly and build demand?

E2: 7,500 educational scholarships for first-generation college students from low-income households.

E3: 1,000 youth in the UPS workforce pipeline for professional and operation positions.

E4: 5,000 underserved youth receive leadership development training and mentorship.

E5: 25,000 women entrepreneurs receive training and micro loans to build and sustain their businesses.

Proposed Indicators

Local Community Engagement

Leverages human capital to inspire and mobilize volunteers and organizations to deliver systemic impact to their local communities.

Expected Long-Term Impact

Strengthen the volunteer movement across the spectrum of community needs, creating a culture of volunteerism.

Position UPS as one of the most civic minded companies in the world.

Increase UPS's unaided brand awareness in key international markets.

L1: 30 million volunteer service hours between 2015-2030.

L2: 1 million volunteer hours in underserved Black communities by 2025.

L3: Modernize employee engagement.

L4: Simplify Neighbor to Neighbor System.

L5: Increase N2N participation from 9% to 13.5% by end of 2023. Volunteer hours per employee from four to six. Management from 60% to 65%. Non-Management from 4% to 10%.

Inputs	# of UPS volunteer events held by location	#/\$ of in-kind donations to support UPS volunteer events	Total amount (\$) employee donated and total amount (\$) of UPS match
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Outputs (Required)	Total # lives impacted, by location, low-to-moderate income and demographics Country(ies), states, priority market supported	# of UPS employee volunteers # of UPS friend/family volunteers	Location(s) of volunteer activities (country; state; city <u>and</u> whether location is considered underserved or predominantly Black)
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Outputs (Optional)	Employee Volunteer NPS	% of UPS employees who recruit one or more additional family/friends to join them in volunteering	% of donations (\$) that went to local organizations	Media stories related to UPS volunteerism with your organization	Unit cost/ average dollar cost of delivering a single unit of your service to an individual (\$USD)
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Proposed Indicators

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Beneficiary Outcomes (Required)

Partner organization satisfaction with volunteer support

Open-ended: Briefly describe your experience with TUPSF volunteer support

Stories of impact by city/country.

Systems Impact

ILO statistics on volunteer work
<https://ilostat.ilo.org/topics/volunteer-work/#>

Internal Indicator

Levels of social media engagement for UPS sponsored volunteer work

% of UPS employees who continue volunteering with organization past first connection by UPS (employee survey)

% of UPS employees who volunteered in their local community within the last 12 months (employee survey)

of media stories of UPS Foundation work

% of UPS employees report they see the impact of UPS philanthropy in their community (employee survey)

Measure of brand awareness (market survey)

Measure of perception of UPS's civic mindedness (employee survey; market survey)

Attitude around volunteerism (employee survey)

Social media reach

% of volunteers who report a greater sense of connection with their communities (employee survey)

Capacity Building

Ability to hire and/or retain qualified staff in all positions

Ability to provide on-the-job training and learning opportunities to enhance staff's program-related skills

Increased capacity for fundraising and capital development

Ability to implement new or innovative programs and/or expand existing programs

Ability to incorporate principles related to equity into program design and delivery

Ability to create and test more innovative solutions and products

Gained the knowledge or ability to carry out more technical or specialized work or to carry that work out more effectively

Stories of impact

Ability to evaluate impact and make data-driven decisions

Proposed Indicators

Planet Protection

Advances environmental justice and a sustainable world.

Expected Long-Term Impact

Improved health and quality of life in metropolitan cities and developing countries by reducing the impacts of climate change on underserved communities.

Increased climate friendly innovative solutions that benefit businesses and communities we serve.

Inputs	# trees purchased (employee engagement)	\$ invested in environmental research and innovation	\$ invested in tree planting efforts
Outputs (Required)	Total # lives impacted, by location, low-to-moderate income and demographics	# of jobs created/supported for tree planting initiatives	# training sessions conducted
	Country(ies), states, priority market supported	open-ended: Tell us about the innovation-focused work that TUPSF support enabled.	Training completion rate (%)
	# trees planted, by type (e.g. lumber/ fruit) and location	# of individuals received training	Was this training virtual or in-person
			Length of training provided (in hours)
Outputs (Optional)	Average Net Promoter Score (NPS) training sessions	# agroforestry projects funded, by location	# of individuals hired for tree planting initiatives by demographics
	# trees planted, by target environment (e.g. schools; watershed/riparian restoration; forest fire restoration; urban areas, communities affected by disaster)		# of individuals hired for tree planting initiatives who were previously unemployed by demographics
			# of individuals hired for tree planting initiatives in long-term positions (without discrete end date) by demographics
			Unit cost/ average dollar cost of delivering a single unit of your service to an individual (\$USD)

P1: Plant 50 million trees between 2015 and 2030: 4.1 million trees planned per year between 2021-2029.

P2: Increase urban tree planting projects targeting 50 domestic and international cities by 2030, linked to sustainable city goals

P3: Double investment to \$1.5 million in environmental research by 2023 to enable innovation.

P4: 50,000 people in underserved communities who are employed/benefit economically from tree planting investments.

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Beneficiary Outcomes (Required)	Average survival rate of trees planted Projected # of trees that will reach maturity	# of individuals with increased income (self-reported) by demographics	Stories of impact by city/country with focus on benefit of tree planting (e.g. provides shade to schoolyard)
Beneficiary Outcomes (Optional)	# farmers implementing land and forest management practices Total # of acres/ hectares restored Total # of acres/ hectares improved or maintained	Average change in financial well-being for beneficiaries within 12 mos. after receiving support (pre-/post- intervention) (Based on CFPB financial well-being score or equivalent)	Open-ended: Tell us about adoption or utilization of innovative solutions driven by your TUPSF-supported work.
Systems Impact	% change in Tree Equity Score by location (systems level)	Distressed Communities Index	Reduction in air pollution (AQI score)
Capacity Building	Ability to hire and/or retain qualified staff in all positions Ability to provide on-the-job training and learning opportunities to enhance staff's program-related skills Increased capacity for fundraising and capital development	Ability to implement new or innovative programs and/or expand existing programs Ability to incorporate principles related to equity into program design and delivery Ability to create and test more innovative solutions and products	Gained the knowledge or ability to carry out more technical or specialized work or to carry that work out more effectively Stories of impact Ability to evaluate impact and make data-driven decisions

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If you have questions or concerns about your measurement and reporting requirements, please reach out directly to your UPS point of contact.

Thank You