

The
UPS Foundation



The UPS Foundation Partner Guidebook

April 2025



Table of Contents

<u>Letter from Nikki Clifton</u>	<u>3</u>
----------------------------------	----------

<u>Why MEL Matters</u>	<u>5</u>
------------------------	----------

<u>MEL Values</u>	<u>6</u>
-------------------	----------

<u>Partnership Type Reference</u>	<u>10</u>
-----------------------------------	-----------

<u>Guidebook Navigator</u>	<u>13 - 14</u>
-----------------------------------	-----------------------

Use this navigator to find your way to the correct part of the Reporting Requirements

<u>Measurement & Reporting Requirements</u>	<u>15 - 114</u>
---	-----------------

<u>Appendices</u>	<u>115-130</u>
-------------------	----------------



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.

Each year, UPS employees and The UPS Foundation give tens of millions of dollars 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, economic empowerment, local community engagement, and planet protection. Through these areas of focus, The 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 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.

Why MEL Matters to The UPS Foundation

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 allows you to demonstrate the depth and breadth of your work, and your alignment with stated goals.

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.

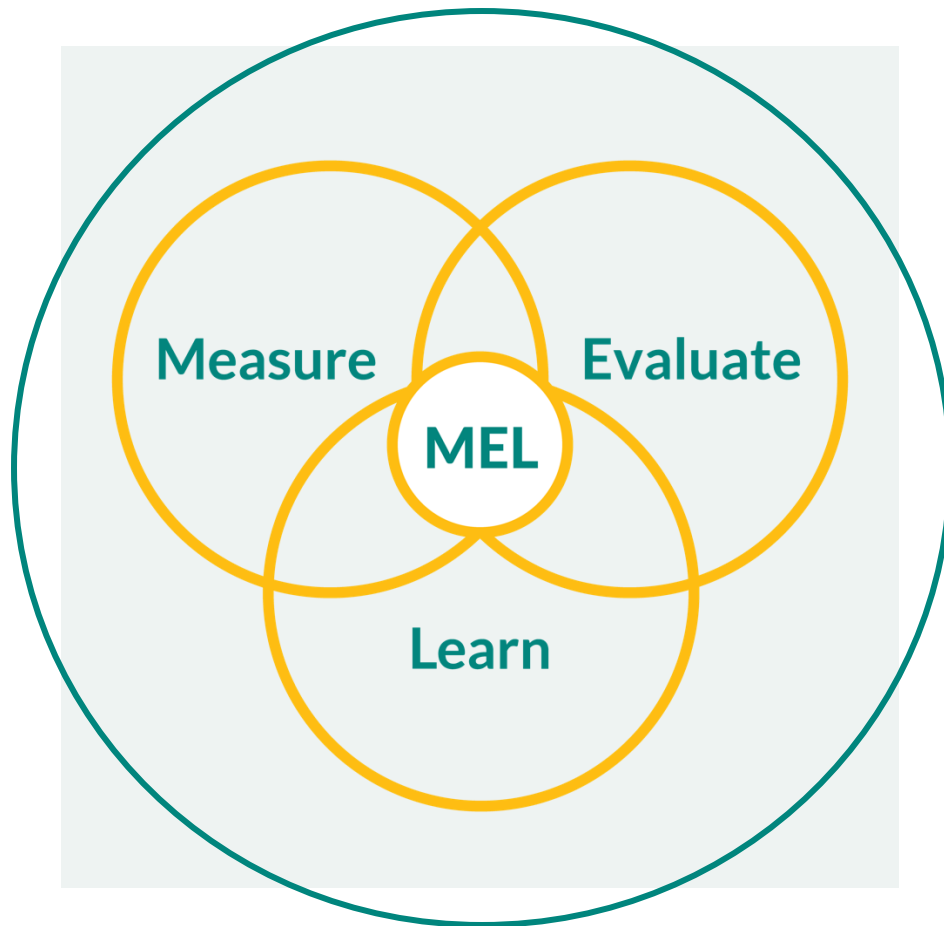
Cost and time effective - Measurement and reporting requirements are targeted and efficient, limiting the burden on both partners and staff.

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 indicators in ways that are collaborative and non-extractive.



The UPS Foundation Story of Impact

1



TUPSF invests in direct service organizations, systems change organizations, collaborative partnerships, and capacity building...

2



→ ...supporting strategic activities,

3



→ building the capacity of supported organizations,

4



→ and resulting in meaningful outcomes for beneficiaries,

5



along with driving broader systems transformation,

6



→ and cementing UPS as a thought leader with a sphere of influence on key issues (like health systems strengthening or anti-trafficking), scaling solutions within the UPS corporation, and increasing brand relevance and recognition,

7



→ ultimately resulting in change at the population level, creating a more equitable and just world for underserved and underrepresented populations.

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 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

Economic Empowerment - Invests in organizations that address education and economic barriers and create opportunities for underserved and underrepresented communities.

L

Local Community Engagement - Leverages human capital to inspire and mobilize volunteers and organizations to deliver 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.
Sponsorships	TUPSF sponsorships that support discrete time-bound events, such as conferences, workshops, etc.

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 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.

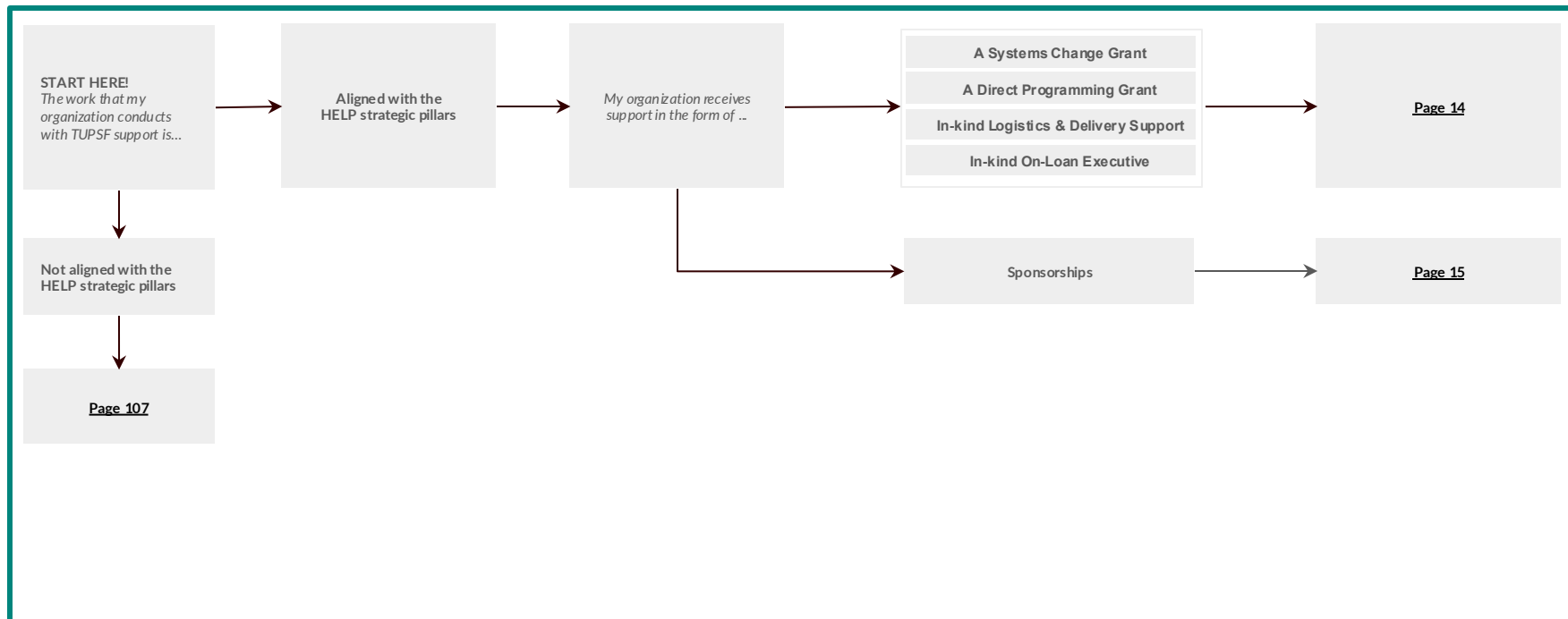
Program Activities	Description
Delivery of Supplies with UPS Support	Programming that delivered goods (vaccines, food, medicine, etc.) using UPS's delivery services.
Health Systems Strengthening	Programming that strives to improve health outcomes for communities at the system level by building networks between and capacity within health system stakeholders, through activities like training, functioning cold chain support, and improving points of access to health support for community members
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.
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 and scholarships for youth aged 14-24 including efforts to break educational barriers and create pathways for youth.
Volunteerism	Direct involvement of UPS employees and their families or friends in providing services or taking action.
Planet Protection Training Activities	Training activities provided in relation to environmental conservation and restoration efforts (e.g. tree planting).
Hiring/ Job Creation 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 impacted communities; 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.

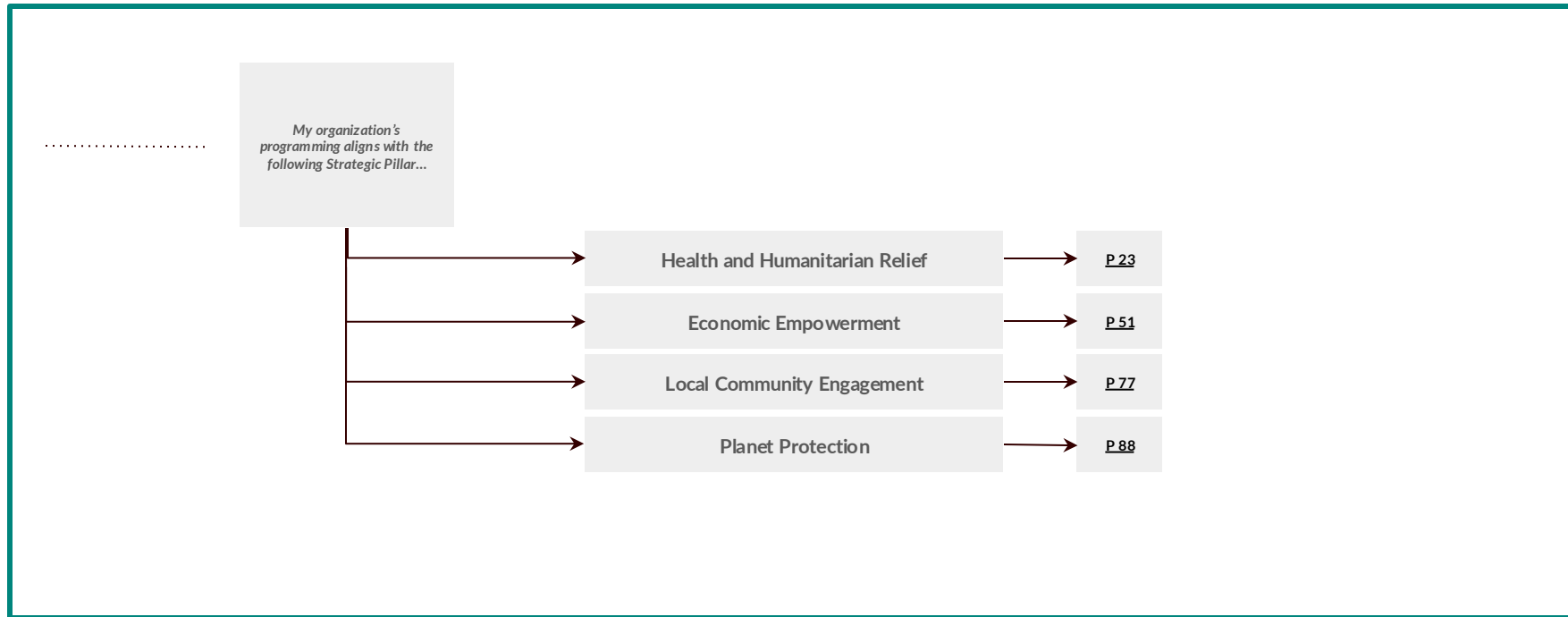


Guidebook Navigator

Use this handy flowchart to determine where you need to reference in the Guidebook based on the Strategic Pillar alignment your organization falls under. If you are not sure which pillar your organization aligns with, reach out to your UPS Foundation point of contact for clarity.

HINT

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



Sponsorships

Measurement and Reporting Requirements

Meetings



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

Reports

Post-Event



Completion Report

Brief report (via survey link) that discusses project/event accomplishments, impacts, and beneficiary/attendee stories.

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. Grant Leads can share a report document in advance as requested.

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, as well as opportunities to qualify data provided throughout the report.

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

Total number of event participants

Impact of The UPS Foundation support on organizational capacity

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 # of event participants	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.

Organizational Capacity Building Indicators

The following outcome indicators are required for all of 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.”

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 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.



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

Annual for Multi-Year Partnerships Only



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.

**The GRI Indicator Report is only required for grantees receiving \$25,000+ in support from TUPSF.*



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.

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.*



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.

Partnership Status and Indicator Update Form Details

Multi-year partners 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. Grant Leads can share a report document in advance as requested.

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, as well as opportunities to qualify data provided throughout the report.

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 \$25,000 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. Grant Leads can share a report document in advance as requested.

The form will request the following information:

lives impacted including by country and demographics

Impact of The UPS Foundation support on intended beneficiaries

The UPS Foundation-required output- and outcome-level 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. Grant Leads can share a report document in advance as requested.

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, as well as opportunities to qualify data provided throughout the report.

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

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 US cities supported	Required
Unit cost/ average dollar cost of delivering a single unit of your service to an individual (\$USD)	Optional

**Total # lives impacted breakdown by low-to-moderate income, disability, and demographics not required for in-kind partners*

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 beneficiaries' resilience score (as measured by the Brief Resilience Scale)	Optional

Health and Humanitarian Relief: Delivery of Supplies with UPS Support – Output Indicators

The following output indicators are required or optional for all Health and Humanitarian Relief partners who delivered goods (vaccines, food, medicine, etc.) using UPS's delivery services. 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 supply shipments delivered with UPS (supplies include medicine, vaccines, food, etc.)	Required
# of supplies delivered with UPS and other organizations due to the logistics or supply chain optimization UPS put in place (ex. ultra cold freezers) by supply type (medicine, vaccines, food, or other)	Required
Open-ended: Please provide additional information on the type and name of the medicine or vaccines delivered	Required
# of recovery shipments	Required
# of preparedness shipments or prepositioning	Required

Health and Humanitarian Relief: Health Systems Strengthening – Output Indicators

The following output indicators are required or optional for all Health and Humanitarian Relief partners who strive to improve health outcomes for communities at the system level . 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 training sessions conducted	Required
# of individuals received training	Required
Training completion rate (%)	Required
# of supplies provided (supplies include medicine, vaccines, etc.)	Required
# of partnerships formed with organizations, health facilities, or clinics	Required
# of individuals receiving care	Required
# of products/services developed/implemented in coordination with government bodies	Optional
# of points of access for better health outcomes that TUPSF support enabled	Required
# of facilities/clinics providing immunization with functioning cold chain	Required

Health and Humanitarian Relief: Health Systems Strengthening – Outcome Indicators

The following outcome indicators are required or optional for all Health and Humanitarian Relief partners who strive to improve health outcomes for communities at the system level. 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 patients reporting improved access to essential care (including medicines, tests, and vaccines, etc.)	Required
% of organizations and/or healthcare providers reporting improved capacity to treat patients	Required
% of organizations and/or healthcare providers reporting that they can deliver on better health outcomes	Required
# of healthcare facilities that reported a reduction in medicine/ vaccine stockouts	Required
% of participants who demonstrate increased knowledge	Required
Open-ended: Tell us about improvement in health outcomes among beneficiaries (e.g., recovery rates, symptom reduction)	Optional
% reduction in vaccine-preventable disease cases in the target areas	Optional
% increase in public confidence in vaccine safety and efficacy (if funding any campaigns)	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
# preparedness tools developed	Required
# of individuals that have engaged with your preparedness programming	Required
# training sessions conducted	Required
# of individuals received training	Required
Training completion rate (%)	Required
# of emergency preparedness plans created or improved	Required
Open-ended: Please describe the creation or improvement of the plans	Required
# agencies/organizations adopting collaborative/integrated protocols	Required
# of partnerships formed with emergency response organizations, emergency services, local authorities, or community groups	Optional

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
% of participants who demonstrate increased knowledge of disaster preparedness	Required
Results of third-party assessments (e.g. OCHA)	Optional
% of agencies/organizations with activities/plans to address interpersonal violence and trafficking	Optional
% of agencies/ organizations with activities/plans to assist at-risk populations	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
# of disaster or humanitarian crisis(es) supported	Required
# of disaster survivors receiving essential services	Required
Open-ended: Provide the name of the disaster or humanitarian crisis(es) supported	Optional

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
Open-ended: Tell us about a business that reopened after a disaster with your support	Optional
Percent of affected households transitioned from temporary to permanent housing within 6 months	Required
Percent of homes rebuilt or repaired to resilient standards within 12 months	Required

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
Open-ended: Tell us about the innovation-focused work that TUPSF support enabled	Required

Outcome indicators for Health and Humanitarian activities	Required v. Optional
Open-ended: Please describe the adoption and/or utilization of the TUPSF-supported innovative solutions	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
Completion rate of the training for individuals (%)	Required
# of UPS drivers who received anti-trafficking training	Optional
# of individuals received training due to UPS in-kind transportation	Optional
# of UPS drivers who are trained as anti-trafficking trainers	Optional
# of training sessions supported by UPS drivers	Optional
# of individuals received training supported by UPS drivers	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 individuals who believe they are equipped to take action when they see suspected human trafficking (post-training survey)	Required
# of individuals who report that they have the situational awareness to identify human trafficking (post-training survey)	Required
# of individuals who understand the process for reporting suspected human trafficking (post-training survey)	Required
# of individuals 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
Completion rate of the training for individuals (%)	Required

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 participants who demonstrate increased knowledge	Required
# of survivors of trafficking placed into a job	Required
# 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.”

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 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 outcome indicators are required or optional based on the program activities funded. 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 communities 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, etc.) have been created and implemented by actors within the system your work/program is addressing.	Required
Best practices (including collaboration/coalition building, 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 impacted communities hold formal and informal leadership and decision-making positions within organizations.	Required
Attitudes and mental models have been shifted.	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 communities 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 populations benefit from the policy changes your work supported?	Required

Best practices (including collaboration/coalition building, 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 impacted communities hold formal and informal leadership and decision-making positions within organizations.

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

Rate to what extent members of impacted communities are involved in specific tasks listed.

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 v. Optional

Required

Required

Required

Attitudes and mental models are shifted.

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 v. Optional

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.



Grants, In-kind Logistics and Delivery, & On-Loan Executives

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

Annual for Multi-Year Partnerships Only



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.

**The GRI Indicator Report is only required for grantees receiving \$25,000+ in support from TUPSF.*



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.

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.*



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.

Partnership Status and Indicator Update Form Details

Multi-year partners 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. Grant Leads can share a report document in advance as requested.

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, as well as opportunities to qualify data provided throughout the report.

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 \$25,000 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. Grant Leads can share a report document in advance as requested.

The form will request the following information:

lives impacted including by country and demographics

Impact of The UPS Foundation support on intended beneficiaries

The UPS Foundation-required output- and outcome-level 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. Grant Leads can share a report document in advance as requested.

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, as well as opportunities to qualify data provided throughout the report.

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

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

Economic Empowerment: All Partners - Output Indicators

The following output indicators are required or optional for all 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 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 US cities supported	Required
Unit cost/ average dollar cost of delivering a single unit of your service to an individual (\$USD)	Optional

**Total # lives impacted breakdown by low-to-moderate income, disability, and demographics not required for in-kind partners*

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.

Economic Empowerment: All Partners - Outcome Indicators

The following outcome indicators are required or optional for all 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 Economic Empowerment activities	Required v. Optional
% change in beneficiaries' resilience score (as measured by the Brief Resilience Scale)	Optional
% change in beneficiaries' perception of neighborhood safety	Optional

Economic Empowerment: Workforce and Leadership Development Activities - Output Indicators

The following output indicators are required or optional for all 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 Economic Empowerment activities	Required v. Optional
# of individuals who received trainings (disaggregated by workforce readiness, leadership, other)	Required
# of workforce readiness training sessions conducted	Required
# of leadership development training sessions conducted	Required
Completion rate of trainings (%)	Required
# individuals who participated in mentorship	Required
# of mentorship sessions conducted	Required
# of individuals participating in TUPSF-supported internships and other hands-on experiences	Required
# of training materials, toolkits, or resources developed	Optional

Economic Empowerment: Workforce and Leadership Development Activities - Outcome Indicators

The following outcome indicators are required or optional for all 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 Economic Empowerment activities	Required v. Optional
% change in leadership self-efficacy (pre-/post program)	Required
# of supported individuals who transition to further education	Required
# of workers placed into a job	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

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

The following outcome indicators are required or optional for all 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 Economic Empowerment activities	Required v. Optional
# of supported individuals placed into a job that provides health insurance benefits	Required
% of individuals who demonstrate increased knowledge	Required
# of supported individuals who retain their job for 6 months or more after starting	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
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)	Optional
Open-ended: Please share some key characteristics of the individuals who were placed into jobs	Optional

Economic Empowerment: Education Activities - Output Indicators

The following output indicators are required or optional for all 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 Economic Empowerment activities	Required v. Optional
Total # participants	Required
Program completion rate (%)	Required
# of training sessions conducted	Required
# of individuals provided scholarships by low-to-moderate income, disability, 1st generation college students, and institution type (2- and 4-year, or credentialing institutions)	Required
# of partnerships with schools, educational institutions, or community organizations	Required
# scholarship recipients in good standing at their educational institution (Minimum 2.5 GPA)	Optional
# of scholarship recipients by major (US only)	Optional
# of educators trained in improved teaching methods	Optional
# of new learning materials created	Optional
# of learning materials provided (e.g., textbooks, digital resources, supplies)	Optional

Economic Empowerment: Education Activities - Outcome Indicators

The following outcome indicators are required or optional for all 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.

Outcome indicators for Economic Empowerment activities	Required v. Optional
Graduation rate for participants	Required
# of supported individuals who transition to employment or further education	Required
# of scholarship recipients who graduated by low-to-moderate income, 1st generation college students, and institution type (2- and 4-year, or credentialing institutions)	Required
% of individuals who demonstrate increased knowledge	Required
% of participants who report applying new skills or knowledge	Required
# of scholarship recipients who had a job 6 months post-graduation	Optional
% change in career readiness scores (as measured by the Career Resources Questionnaire)	Optional

Economic Empowerment: SME/SMB - Output Indicators

The following output indicators are required or optional for all 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 Economic Empowerment activities	Required v. Optional
# of businesses supported	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	Required
# of mentorship sessions conducted	Required
# of individuals who participated in mentorships	Required
# of digital tools or e-commerce platforms adopted for business growth	Required
# of partnerships or supply chain linkages	Required
% of businesses accessing new markets	Required
# of businesses supported by industry	Optional
# of small businesses supported with e-commerce business model	Optional

Economic Empowerment: SME/SMB - Output Indicators Cont.

The following output indicators are required or optional for all 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 Economic Empowerment activities	Required v. Optional
# of individuals who received trainings	Required
# training sessions conducted	Required
Training completion rate (%)	Required
# of training materials, toolkits, or resources developed	Required
# of trade fairs and business forums held	Required
Total hours of advisory services/training/capacity building activities/technical assistance provided to small businesses	Optional
# of new partnerships established to improve resource flows to entrepreneurs	Optional
# of products/ services developed to improve resource flows to entrepreneurs	Optional
Open-ended: Please share some key characteristics of the businesses supported	Optional

Economic Empowerment: SME/SMB - Outcome Indicators

The following outcome indicators are required or optional based on total support amount for all 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 Economic Empowerment activities	Required v. Optional
% change in entrepreneurial self-efficacy (pre/post program)	Required
# of businesses that scaled up	Required
# of businesses that reported increased revenue	Required
# of jobs created	Required
# of small business owners connected to the global economy	Required
# of small business owners acquired job readiness skills	Required
% of individuals who report confidence in using financial products or services	Required
% of individuals involved in making major household decisions	Required
% of individuals who demonstrate increased knowledge	Required

Economic Empowerment: SME/SMB - Outcome Indicators Cont.

The following outcome indicators are required or optional based on total support amount for all 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 Economic Empowerment activities	Required v. Optional
# of micro businesses that scaled to small businesses	Required
# of business that reported improvements in business confidence and leadership skills	Required
# of businesses that reported improvements in business and financial strategies/operations	Required
Value of new business and investment opportunities (in USD)	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)	Optional
% of individuals who demonstrate increased knowledge due to training participation	Optional
% of supported businesses reporting the adoption of digital tools or e-commerce platforms for business growth	Optional
% of supported businesses accessing new markets	Optional
% of supported businesses reporting an increase in partnerships or supply chain linkages	Optional
Open-ended: Please share some key characteristics of the businesses that scaled up	Optional

Economic Empowerment: Research & Innovation - Output & Outcome Indicators

The following output and outcome indicators are required or optional for all 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 Economic Empowerment activities	Required v. Optional
Tell us about the innovation-focused work that TUPSF support enabled	Required
Outcome indicators for 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.”

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 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 outcome indicators are required or optional based on the program activities funded. 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 communities 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, etc.) have been created and implemented by actors within the system your work/program is addressing.	Required
Best practices (including collaboration/coalition building, 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 impacted communities hold formal and informal leadership and decision-making positions within organizations.	Required
Attitudes and mental models have been shifted.	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 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 populations benefit from the policy changes your work supported?	Required

Best practices (including collaboration/coalition building, 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 impacted communities hold formal and informal leadership and decision-making positions within organizations.

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

Rate to what extent members of impacted communities are involved in specific tasks listed.

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 v. Optional

Required

Required

Required

Attitudes and mental models are shifted.

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 v. Optional

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.



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

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

Annual for Multi-Year Partnerships Only



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.

**The GRI Indicator Report is only required for grantees receiving \$25,000+ in support from TUPSF.*



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.

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.*



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.

Partnership Status and Indicator Update Form Details

Multi-year partners 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. Grant Leads can share a report document in advance as requested.

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, as well as opportunities to qualify data provided throughout the report.

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 \$25,000 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. Grant Leads can share a report document in advance as requested.

The form will request the following information:

lives impacted including by country and demographics

Impact of The UPS Foundation support on intended beneficiaries

The UPS Foundation-required output- and outcome-level 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. Grant Leads can share a report document in advance as requested.

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, as well as opportunities to qualify data provided throughout the report.

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

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 US cities supported	Required
Unit cost/ average dollar cost of delivering a single unit of your service to an individual (\$USD)	Optional

**Total # lives impacted breakdown by low-to-moderate income, disability, and demographics not required for in-kind partners*

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
Whether volunteer activities served communities considered underserved or not considered underserved	Required
# of lives impacted through volunteer activities	Required
Outcome indicators for Volunteer Activities	Required v. Optional
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.”

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 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.



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

Annual for Multi-Year Partnerships Only



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.

**The GRI Indicator Report is only required for grantees receiving \$25,000+ in support from TUPSF.*



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.

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.*



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.

Partnership Status and Indicator Update Form Details

Multi-year partners 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. Grant Leads can share a report document in advance as requested.

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, as well as opportunities to qualify data provided throughout the report.

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 \$25,000 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. Grant Leads can share a report document in advance as requested.

The form will request the following information:

lives impacted including by country and demographics

Impact of The UPS Foundation support on intended beneficiaries

The UPS Foundation-required output- and outcome-level 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. Grant Leads can share a report document in advance as requested.

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, as well as opportunities to qualify data provided throughout the report.

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

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 US cities supported	Required
Unit cost/ average dollar cost of delivering a single unit of your service to an individual (\$USD)	Optional
# trees planted by country	Required
# trees planted, by target environment (e.g. schools; watershed/riparian restoration; forest fire restoration; urban areas, communities affected by disaster)	Optional
# of acres or hectares of land preserved/restored/improved/maintained (i.e., bio-diversity, cleaning up trash/weeding)	Optional

*Total # lives impacted breakdown by low-to-moderate income, disability, and demographics not required for in-kind partners

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
Projected number of trees that will reach maturity	Required
Metric tons of CO2 sequestered	Optional
# of individuals with increased income (self-reported)	Required

Planet Protection: Training Activities – Output & Outcome 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
Training completion rate (%)	Required
# of individuals received training	Required
Outcome indicators for Planet Protection activities	Required v. Optional
% of individuals who demonstrate increased knowledge	Required

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	Required
# of individuals hired for tree planting initiatives	Optional
# of individuals hired for tree planting initiatives who were previously unemployed	Optional
Open-ended: Please share some key characteristics of the individuals hired	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.”

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 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 outcome indicators are required or optional based on the program activities funded. 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 communities 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, etc.) have been created and implemented by actors within the system your work/program is addressing.	Required
Best practices (including collaboration/coalition building, 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 impacted communities hold formal and informal leadership and decision-making positions within organizations.	Required
Attitudes and mental models have been shifted.	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 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 populations benefit from the policy changes your work supported?	Required

Best practices (including collaboration/coalition building, 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 impacted communities hold formal and informal leadership and decision-making positions within organizations.

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

Rate to what extent members of impacted communities are involved in specific tasks listed.

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 v. Optional

Required

Required

Required

Attitudes and mental models are shifted.

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 v. Optional

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.

**The GRI Indicator Report is only required for grantees receiving \$25,000+ in support from TUPSF.*

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. Grant Leads can share a report document in advance as requested.

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, as well as opportunities to qualify data provided throughout the report.

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

GRI Indicator Report

Partners who receive funding of \$25,000 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. Grant Leads can share a report document in advance as requested.

The form will request the following information:

lives impacted including by country and demographics

Impact of The UPS Foundation support on intended beneficiaries

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

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 US cities supported	Required
Unit cost/ average dollar cost of delivering a single unit of your service to an individual (\$USD)	Optional

**Total # lives impacted breakdown by low-to-moderate income, disability, and demographics not required for in-kind partners*

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.”

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 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.

Glossary of Key Terms	116
Partner Feedback	118
Lives Impacted Measurement Guidance	119
Measurement and Reporting Requirements for TUPSF Partners	124
Budget Categories	127
Demographic Breakdowns Requested	128
The UPS Foundation Contact Information	130



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 an initiative's targeted challenge. This may include those impacted by both natural disasters (e.g. hurricanes) and manmade disasters (e.g. civil conflict), survivors of trafficking, or others with lived experience regarding the targeted challenge.



Resilience

refers to the capacity to withstand or to recover quickly from difficulties; toughness.



Underserved

refers to communities that face institutional barriers that prevent them from accessing resources and opportunities and are otherwise 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 impacted communities; adopting activities and practices focused on improving social and environmental conditions; and shifting attitudes/mindsets.

Partner Feedback Indicators

TUPSF strives to continually learn and enhance its approach to partnerships. Please provide your honest feedback on the measurement and reporting processes so that TUPSF can make adjustments as needed to continue to be a strong partner. You will be asked to rate your level of agreement with the following indicators on a scale of 1 (strongly disagree) to 5 (strongly agree).

Partner Feedback Indicators	Required v. Optional
Clarity/ Understanding: TUPSF measurement and reporting processes make sense and work well for your organization.	Required
Time/ Burden: TUPSF measurement and reporting requirements do not feel overly burdensome or require too much of a time commitment.	Required
Communication: TUPSF staff have been responsive to queries and needs from our organization.	Required
Meaningful Indicators: TUPSF-required indicators are helpful for our organizational learning, adaptation, and growth.	Required
Fairness: TUPSF treats our org fairly, right-sizing requests based on organizational size and capacity, and without prejudice.	Required
Impacted Populations: TUPSF-required indicators adequately account for impacted population considerations.	Required
Open-ended: Please share any additional feedback about TUPSF's measurement and reporting processes.	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.

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
Delivery of Supplies with UPS Support	Number of individuals that received meals, vaccines, medicines, or other supplies delivered by UPS	Number of items delivered by UPS Number of shipments delivered by UPS Number of individuals that received meals, vaccines, medicines, or other supplies delivered by companies other than TUPSF
Health Systems Strengthening	Number of individuals received training Number of individuals that received vaccines or medicines funded by TUPSF Number of individuals received care	Projected number of individuals who will benefit from implemented functioning cold chains Estimated number of individuals who did not contract a particular disease due to preventable disease reduction efforts
Disaster Preparedness	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 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	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 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
Disaster Response	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	Number of items shipped and/or distributed Number of disaster survivors in affected geographic area/served by non-UPS funding

Program Activities	Parameters	
	Valid	Invalid
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
Research and Innovation	<ul style="list-style-type: none"> Number of individuals directly served by research/innovation (e.g. recipients of vaccines enabled through cold chain solutions) 	<ul style="list-style-type: none"> 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	<ul style="list-style-type: none"> 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, well-being, health, or resilience scores 	<ul style="list-style-type: none"> Number of meals served or items distributed Average number of visitors in a year/week/etc.

Program Activities	Parameters	
	Valid	Invalid
Workforce and Leadership Development	<ul style="list-style-type: none"> 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 	<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)
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 Number of scholarship recipients who received scholarships through The UPS Foundation support/funding 	<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) Number of individuals in the geographic area or demographic group served by scholarships
Other 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
Planet Protection 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
Hiring/ Job Creation 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, Systems Change Grant								
All Values	Required	Not Required	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								
All Values	Not Required	Not Required	Not Required	Not Required	Required once ** (end of funding cycle)	Not Required	Not Required	Not Required

*Variable requirement is context-dependent. TUPSF will notify the organization if applicable.

**Completion reports for Sponsorships are due one month from the date of the last event held in the funding period.

Note: Please refer to the project start date indicated in Versaia application for the above reporting guidelines.

Measurement and Reporting Requirements for TUPSF Partners – Multi-Year Partnership

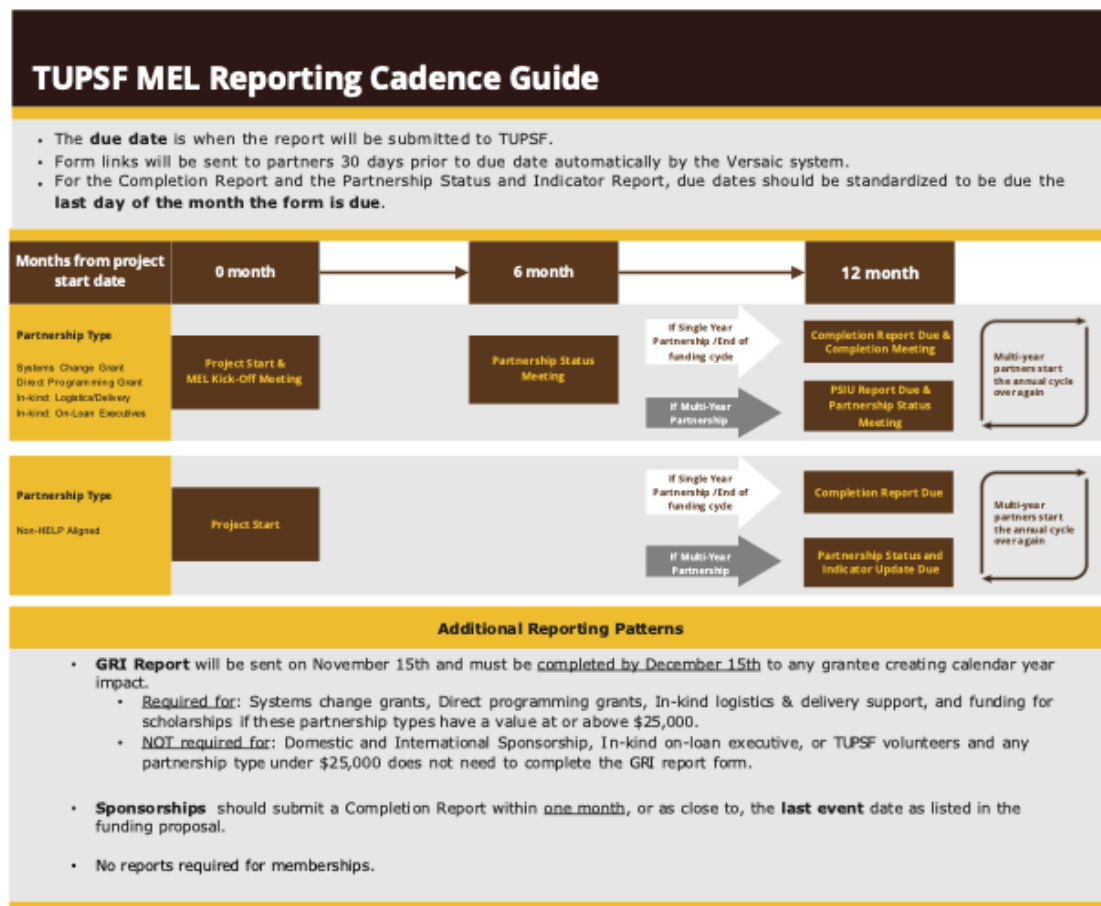
Funding Category	MEL Kick-Off Meeting	Partnership Status and Indicator Update	Partnership Status Meeting	GRI Indicator Report	Completion Report	Completion Meeting	Post-Completion Follow-Up	Third-Party Impact Evaluation
Partnership Type: Systems Change Grant, Direct Programming Grant, In-kind: Logistics/Delivery, In-kind: On-Loan Executives, Systems Change Grant								
All Values	Required	Required annually (Every 12 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								
All Values	Not Required	Not Required	Not Required	Not Required	Required** (End of funding cycle)	Not Required	Not Required	Not Required

*Variable requirement is context-dependent. TUPSF will notify the organization if applicable.

**Completion reports for Sponsorships are due one month from the date of the last event held in the funding period.

Note: Please refer to the project start date indicated in Versaia 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

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

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.	IMF
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"	



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

Thank You