Trellis Foundation Partner Guide

Trellis Foundation advances equitable educational opportunities in Texas by supporting postsecondary programs, practices, and systems that reduce disparities and lead to success for low-income students and students of color. Our relationships with funded partners are built on mutual respect and common goals. The Foundation demonstrates its commitments to the transformative power of education, collaboration, equity, integrity, and data-informed decisions in our relationships with our funded partners. We seek to partner with entities with similar values.

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Contact the Trellis Foundation Team

Please do not hesitate to reach out with questions or conversation at any time.

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Partner with Us

Our goal is to support you in achieving success while learning from challenges and setbacks. Ideally, partnering with the Foundation should not add additional work to your plate.

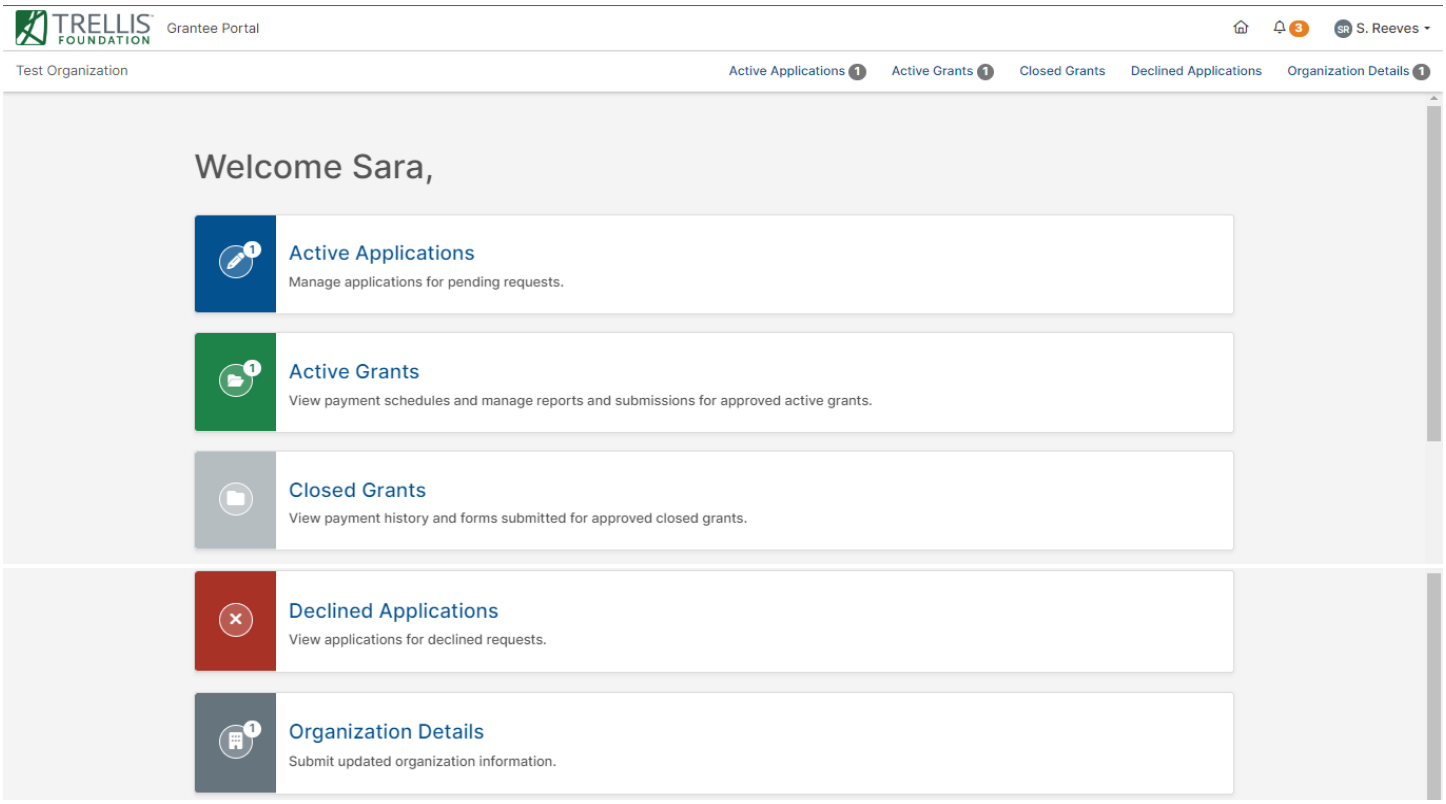
In developing the structure of our partnership, we are happy to align deliverables, reporting, and payments with times and structures that work best for you. We also understand that things will change with implementation, and we are happy to change timelines; deliverables; reporting due dates; and payment sizes, types, and timing. We also want to learn from the developments that lead to changes and hope you will communicate with us. Some changes may require an amendment to our agreement, but that is rare. We can determine that together

Grantee Portal

In addition to direct communication with the Foundation staff, the Foundation communicates with its partners through our Grantee Portal in our grants management system, GivingData.

Grantee Portal: trellisfoundation.givingdata.com/portal

This is where you can submit applications, see previously submitted applications, submit reports, see previously submitted reports, update contact information for your organization, and request grant amendments when needed.



Portal User Account

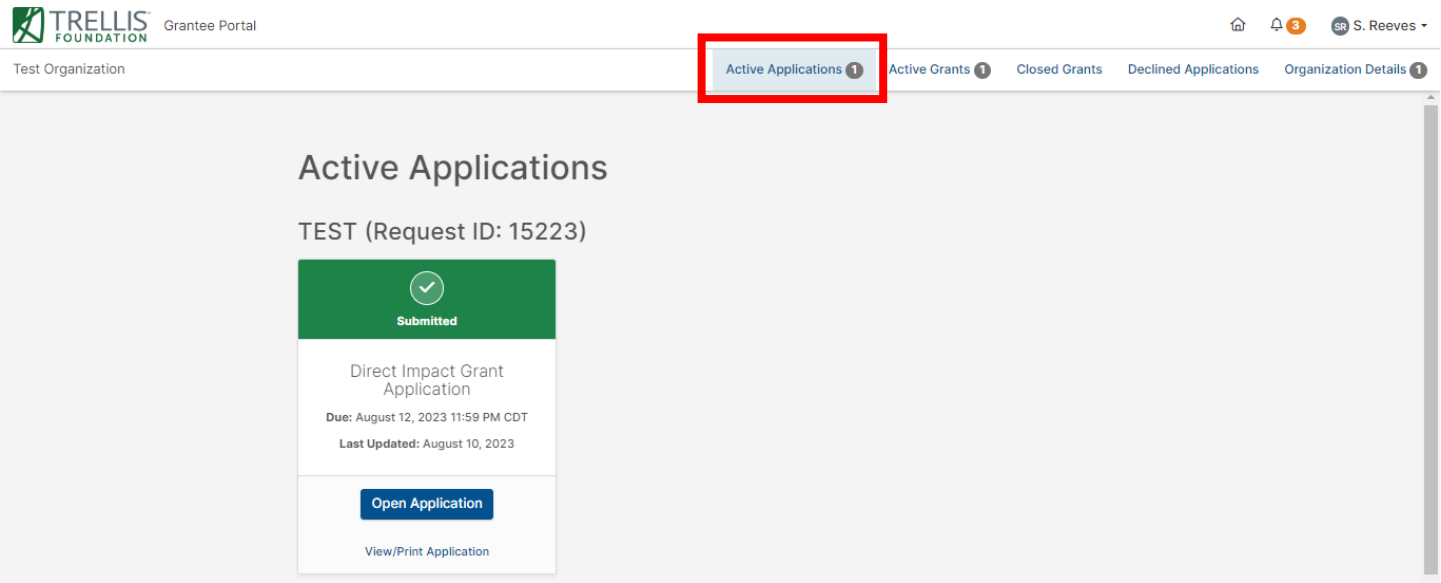
At least one person in your organization should have a Portal User account. For partners responding to an RFP, a Portal User account was created for the person who completed the RFP application. For all other partners, an account was created by a Trellis Foundation staff member for the person at your organization who was our point of contact during the application process. The invitation to submit the online application was sent to this person from the Grantee Portal.

Only individuals with Portal User accounts can access the Grantee Portal. Your organization can have as many Portal Users has you would like. If you would like to add Portal Users, email Jeaiza at jeaiza.quinones@trellisfoundation.org. Portal Users can be granted access to all your organization's applications and reports, or they can only be given access to specific applications and reports. By default, Portal Users are granted access to all applications and reports. If you would like to restrict or expand a Portal User's access to your applications and reports, email Jeaiza at jeaiza.quinones@trellisfoundation.org.

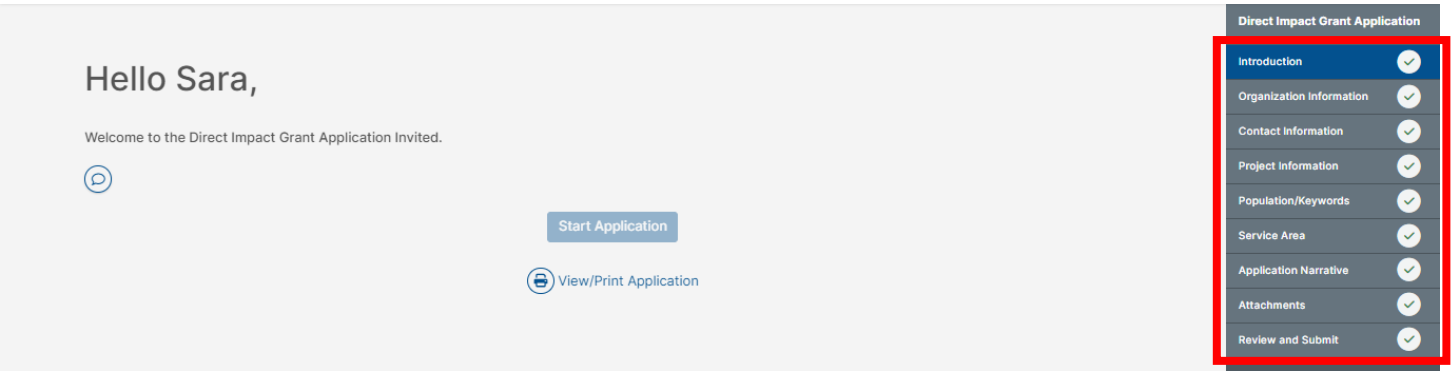
Note: Portal accounts can be created for group emails (such as grants@myorganization.com, development@, or finance@); however, these accounts cannot be tied to an individual contact record. If creating a portal account for a group email, please name contact record accordingly (such as My Organization Grants Team or My Organization Finance Department).

Active Applications

If you are completing an RFP application or have been invited by the Foundation to submit an application, the online application form is in the Grantee Portal under **Active Applications**.



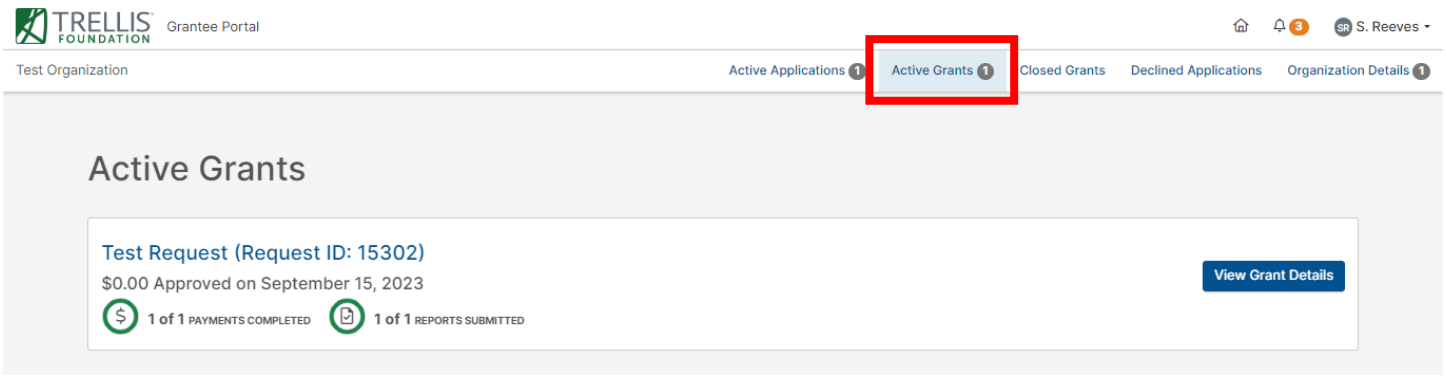
You will complete **all pages** in the application before submitting.



If you have questions about submitting your application, contact Jeaiza at jeaiza.quinones@trellisfoundation.org.

Active Grants

You can find information on any active approved grants your organization has with Trellis Foundation in the Grantee Portal under **Active Grants**. This includes payments processed, reports submitted or pending, and other submissions or applications associated with this grant.



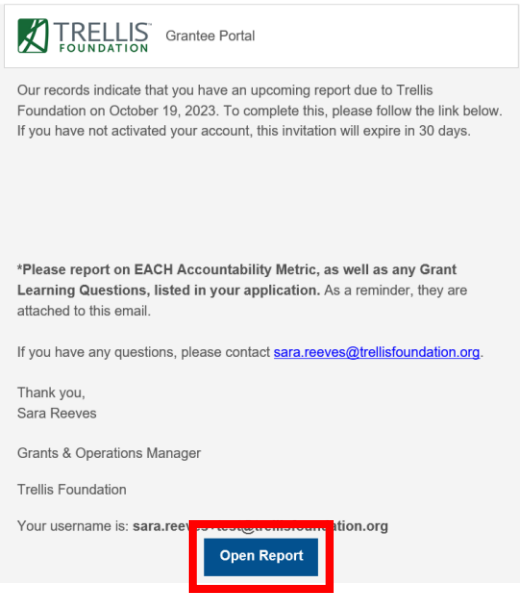
Submitting Reports

When a progress or final report is due to the Foundation, we will send a notification no less than 30 days before the deadline. These notifications are emailed to the individuals listed in your grant application as the Primary Contact and Reporting Contact through the Grantee Portal. To complete a report, a contact must have a Portal User account. If the Primary Contact and/or Reporting Contact do not have a Portal User account, the notification will also go to the organization contact with a Portal User account.

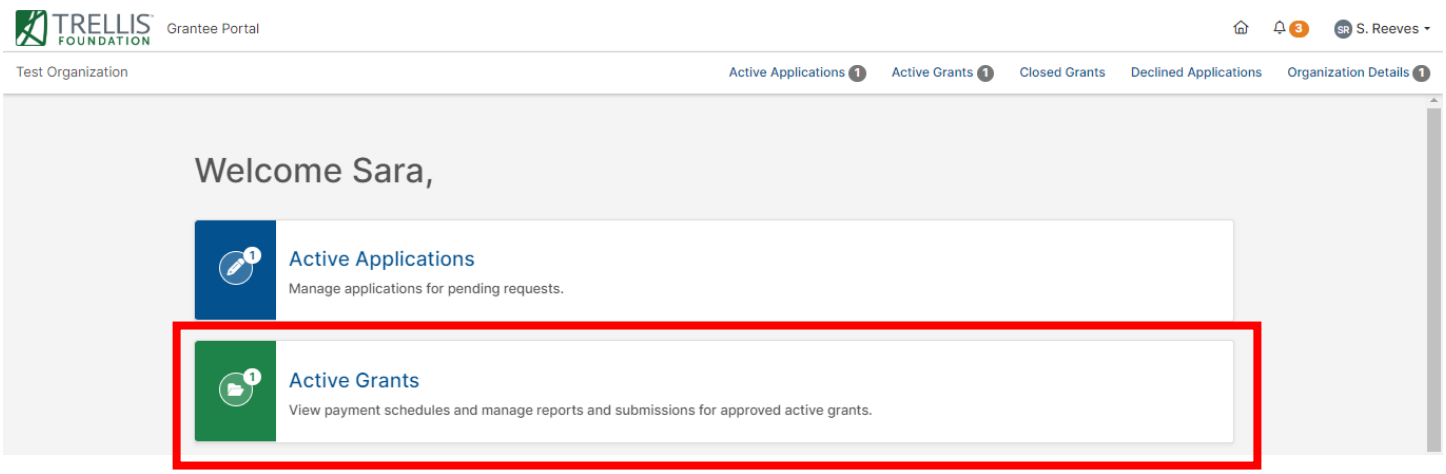
Note: Make sure the givingdata.com domain is whitelisted in your email client to ensure the email notifications are not caught in a spam filter.

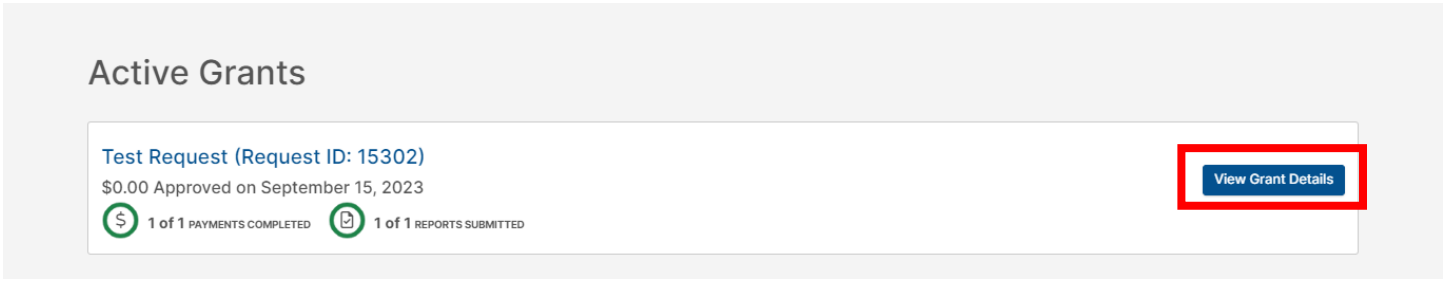
Note: To see who your grant contacts are, see Updating Grant Contact Information below.

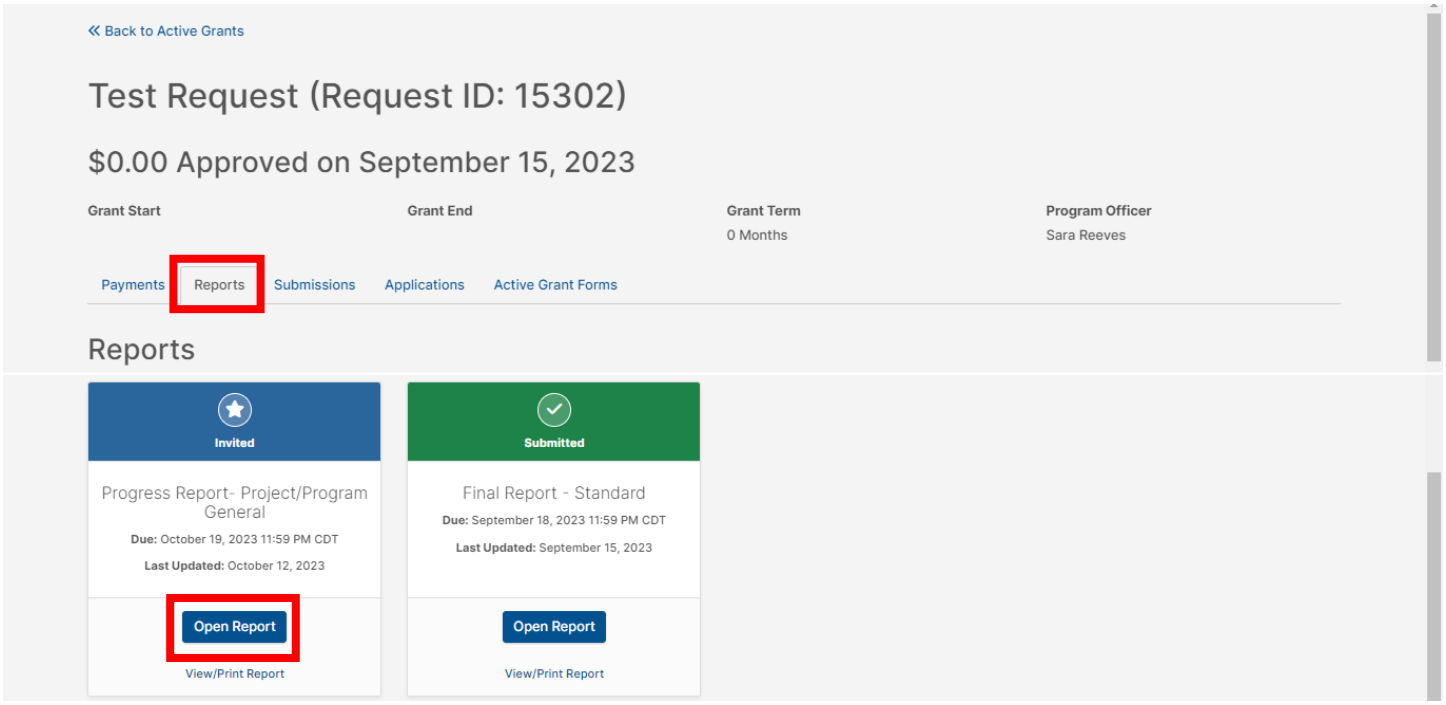
To submit a report, you can click on the link in the notification email to go directly to the report form.



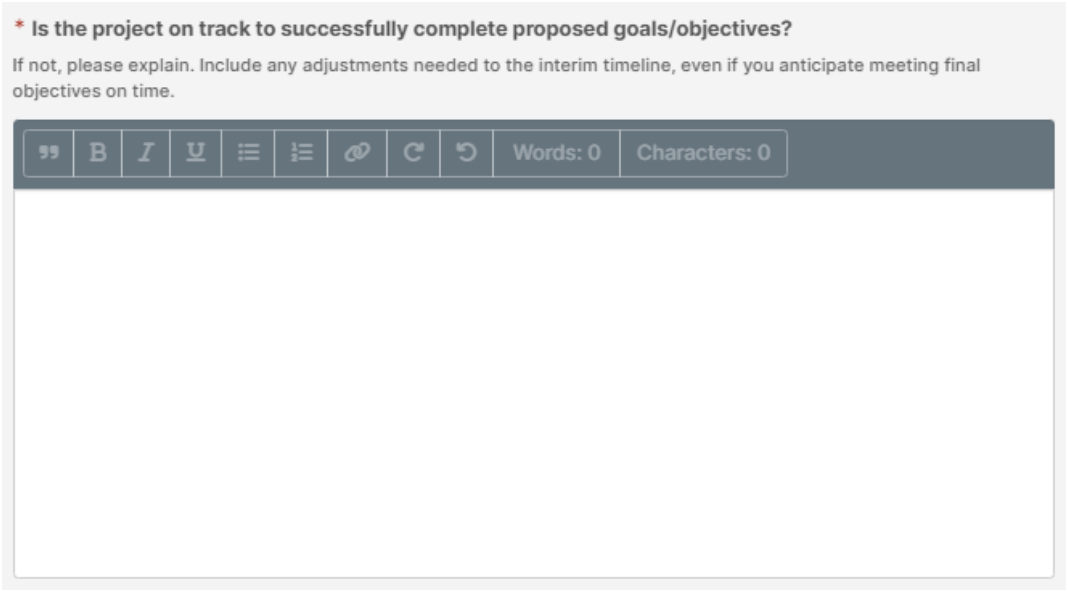
You can also find the report under Active Grants > View Grant Details > Reports > Open Report.

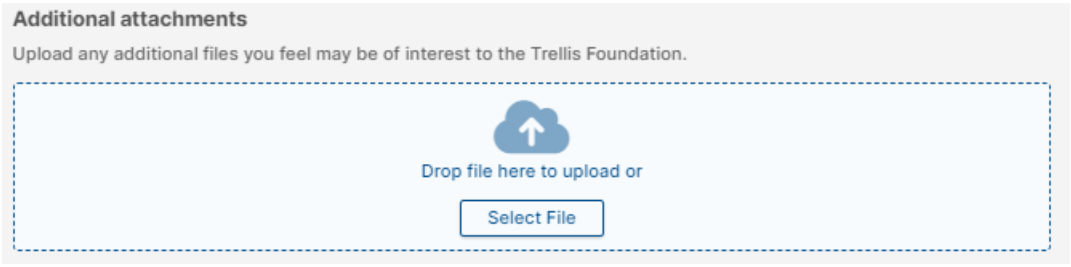




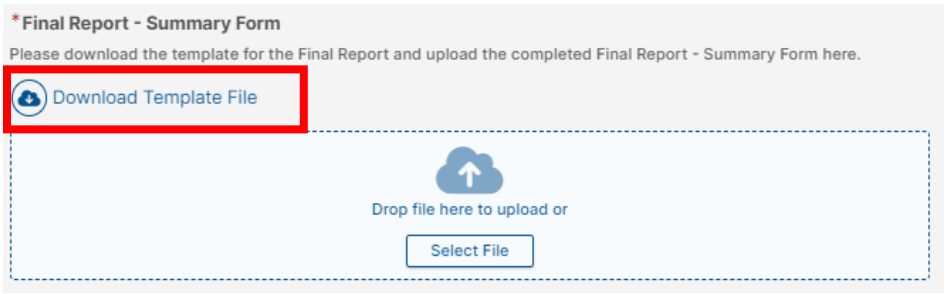


When completing a report, you may be asked to fill in online fields and/or upload attachments.

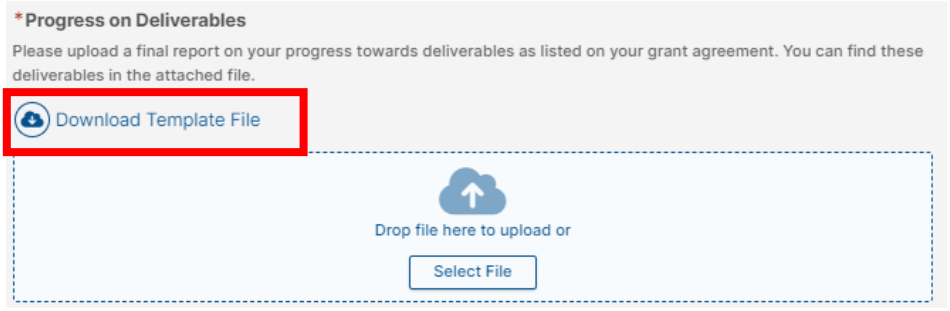




In some cases, you may be provided with **templates** in the report form to use as part of your reporting. For example, for the final report, you will download a Word document, complete it, and upload it to the portal.



We might also provide you with **files specific** to your grant. For example, we may link a document that includes the deliverables listed in your grant agreement so you can reference them in providing an update.



Note: The Grantee Portal calls all files attached to a reporting form "templates." As you can see above, it says **Download Template File**. However, in this case the file is not a template, but rather a list of the deliverables from your grant agreement.

If you have any questions while completing your report, you can email Jeaiza at jeaiza.quinones@trellisfoundation.org. You can also send messages through the Grantee Portal comment feature. Learn more about the comment feature in the Other Portal Communications section below.

If at any time you need to adjust the due date for a report, do not hesitate to reach out to Jeaiza at jeaiza.quinones@trellisfoundation.org. When possible, please reach out at least one week before the due date.

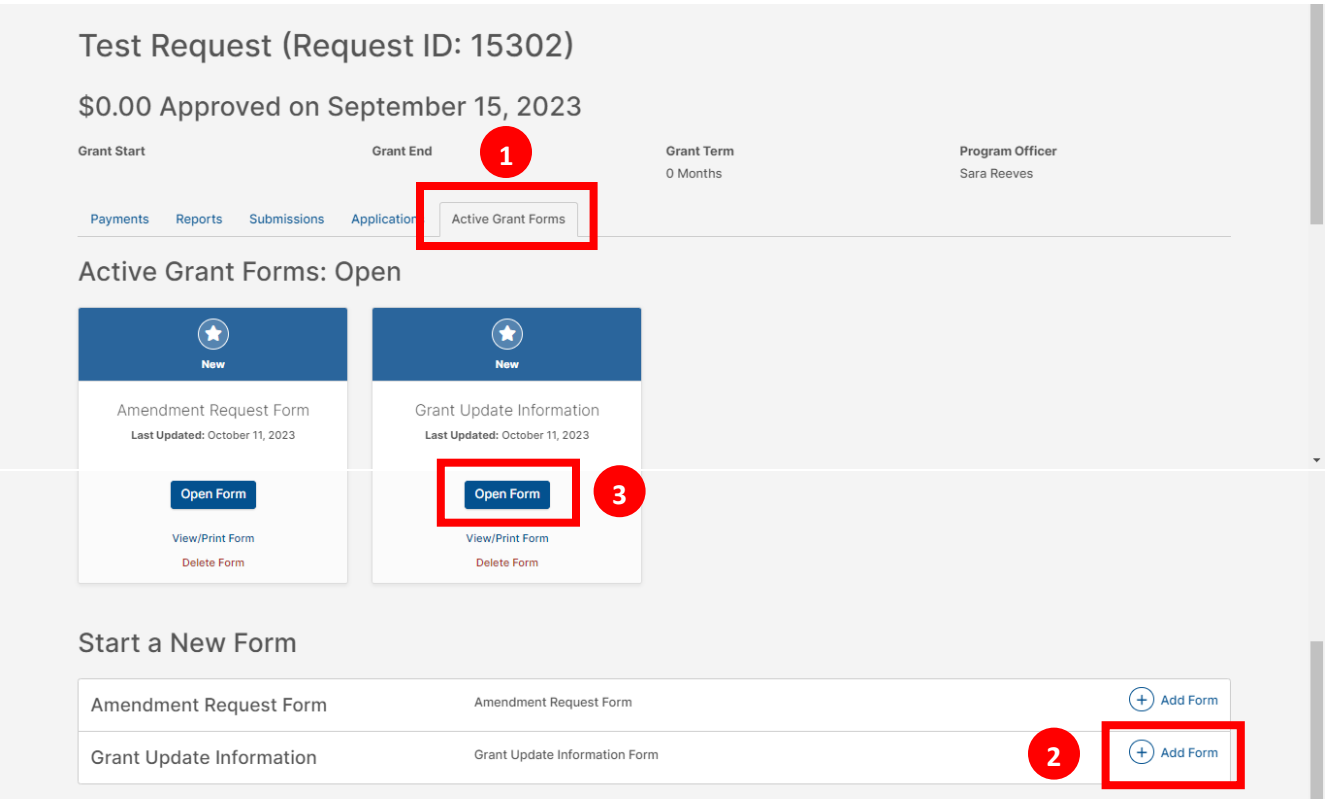
Updating Grant Contact Information

You can see who is listed as contacts for your grant and update these contacts at any time through the Grantee Portal. It is important to keep this information up to date. The grant contacts we use for communication purposes are:

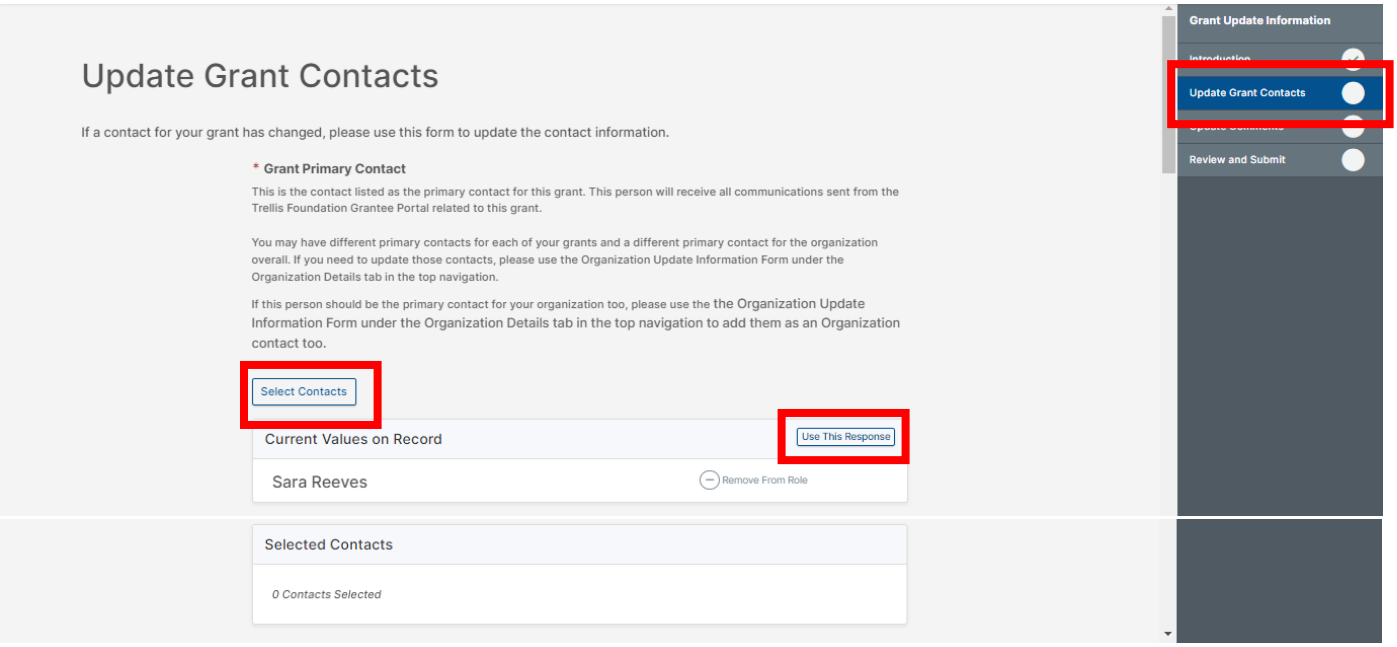
- Grant Primary Contact – Contact to receive all communication about grant.
- Grant Program or Project Contact – Individual(s) who directly oversee the funded work.
- Reporting Contact – Individuals who should be notified about and may submit progress and final reports.
- Signatory – Person authorized to sign grant agreements.

It could be that a single person is the contact for all these roles, but they may be different individuals.

To check and/or change your grant contacts: Active Grants > View Grant Details > **Active Grant Forms** > Grant Update Information > **Add Form**. Once a new form is added, click **Open Form** and then use the **Update Grant Contacts** page. See screenshots of these steps on the next page of this document.



The form shows the person current listed in the role. Click **Select Contacts** to choose a new contact. Click **Use This Response** to keep the contact the same.

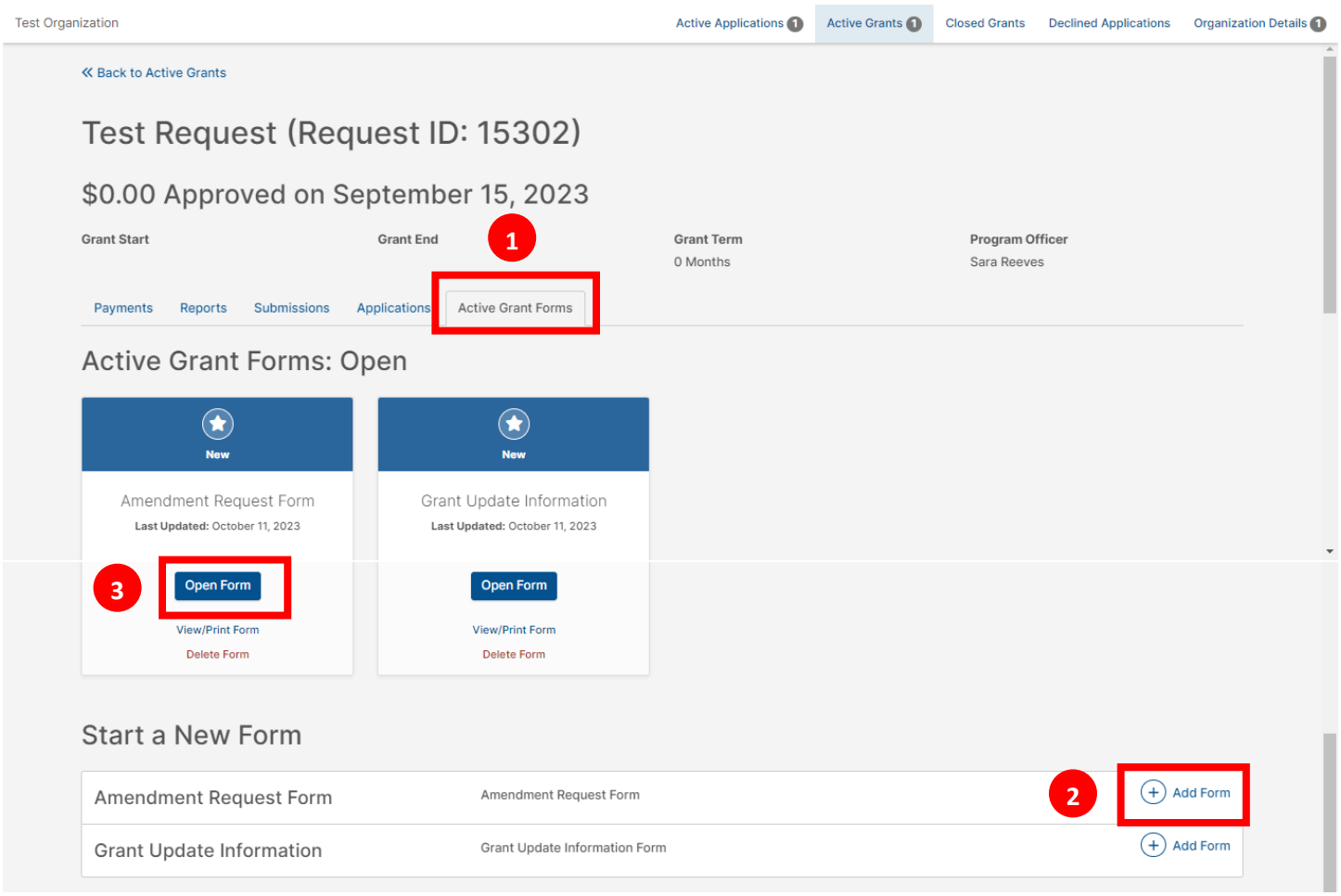


When you click Select Contacts. You select from a list of existing contacts for your organization in the system or Add a New Contact.

Note: The process described above is for updating contact information for a specific grant. The Foundation also maintains contact information for your organization overall that is not specific to a single grant (such as the President or Executive Director). You can see information on how to check and change those contacts in the Organization Details section below.

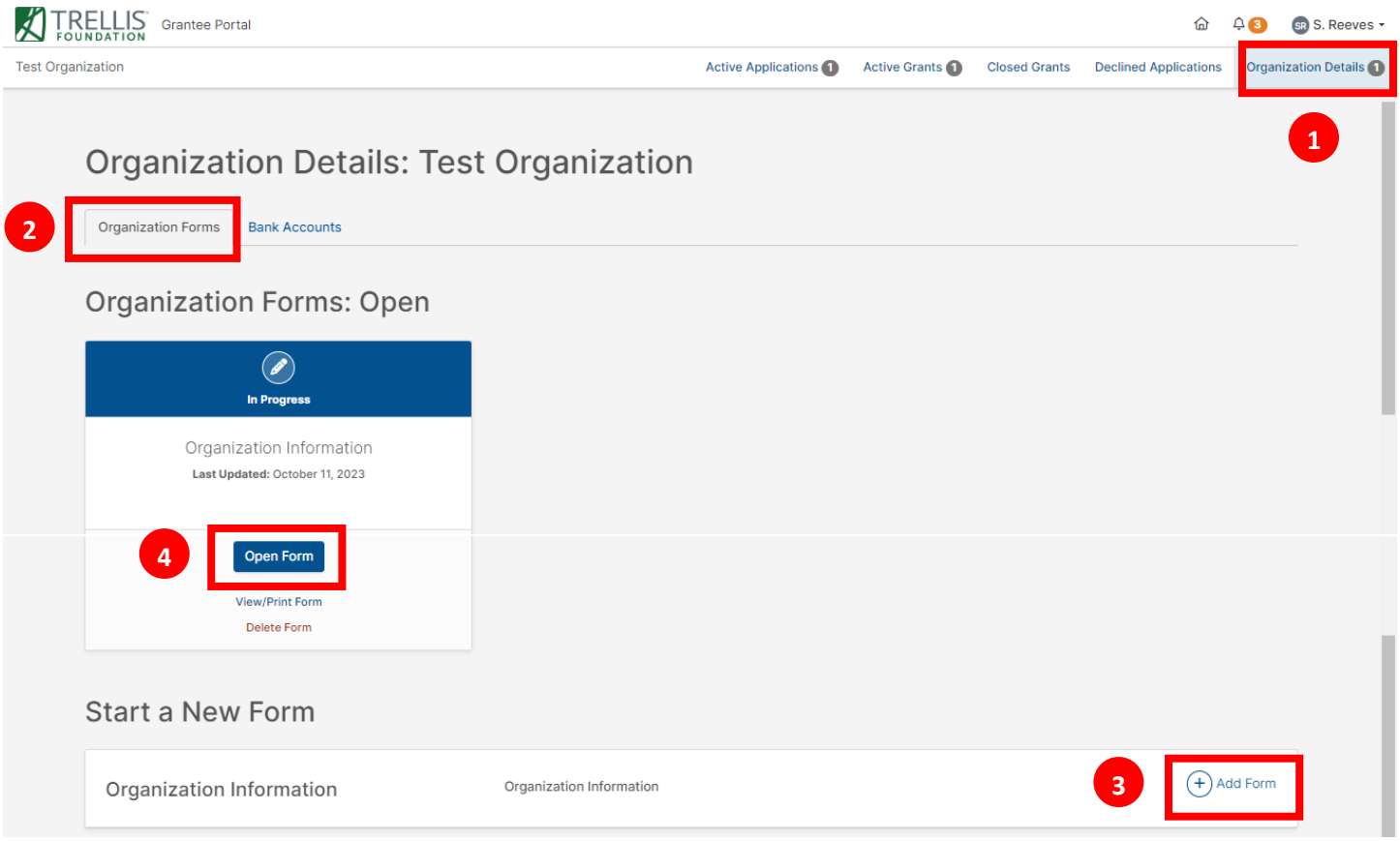
Requesting Amendments

We know you are operating in complex and dynamic environments and your work needs to be responsive and adaptive. This might mean amending our grant agreement. The most common reason is to request an extension of the grant term. You should reach out to your program officer, and you can submit a request for an amendment through the Grantee Portal under Active Grants > View Grant Details > **Active Grant Forms** > **Amendment Request Form**.



Organization Details

You can update the information we have on file about your organization under the Organization Details tab in the Grantee Portal. Go to **Organization Details** > **Organization Forms** > Organization Information > **Add Form** > **Open Form**. You can find information on how to use the form under Updating Grant Contact Information.

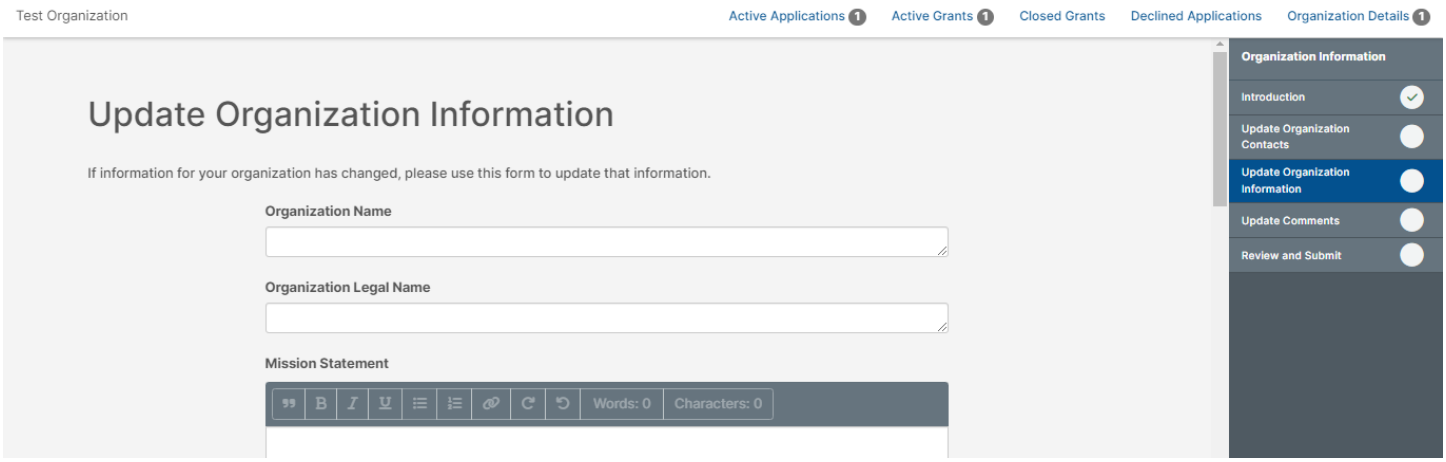


This form includes the organization contacts:

- Primary Contact – Contact to receive all communication related to the organization.
- Finance Contact – person to whom communications about grants disbursements will be sent. This includes requests to set up a vendor account in bill.com (if needed) and notifications of payments processed.
- President/Executive Director/CEO/Executive Leader

Uou can also use this form to update:

- Organization Name and Legal Name
- Organization Mission Statement
- Organization Background
- Organization Address
- Organization Email
- Organization Website
- Organization Phone Number
- Organization Fax Number
- Organization Tax ID



Grantee Portal Communications

Applications

When you are invited to submit an application to the Trellis Foundation, the person who has been the main point of contact in the grant discussions will receive an email from the Grantee Portal inviting them to complete the online application. This person now has a Portal User account.

Reports

An email will be sent from the Grantee Portal no less than 30 days before a report is due to the Trellis Foundation. That email will be sent to:

- Grant Primary Contact
- Grant Program or Project Contact
- Grant Reporting Contact
- Portal User (if none of the above contacts have a Portal User account).

Contacts with Portal User accounts will be able to access and submit the report.

Payment Disbursements

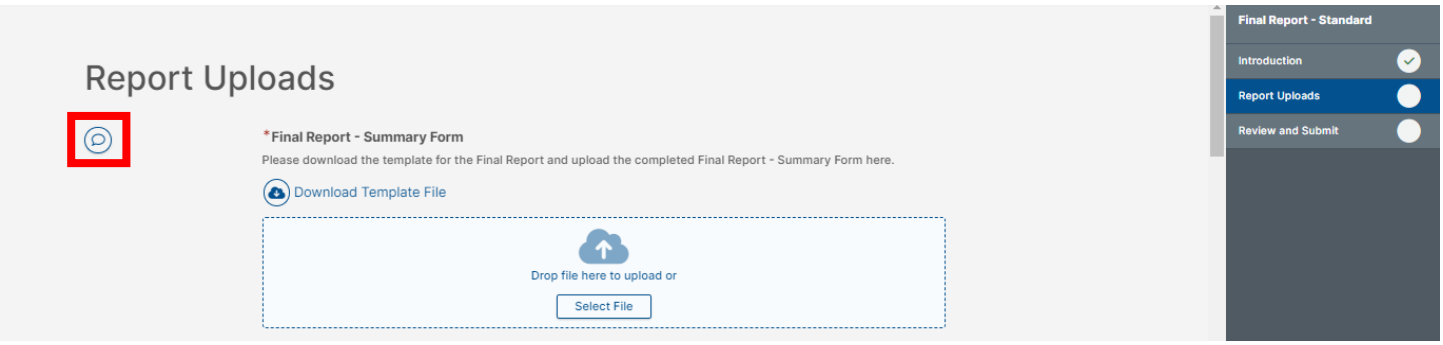
When the Trellis Foundation processes a payment to your organization, an email is sent from the Grantee Portal to:

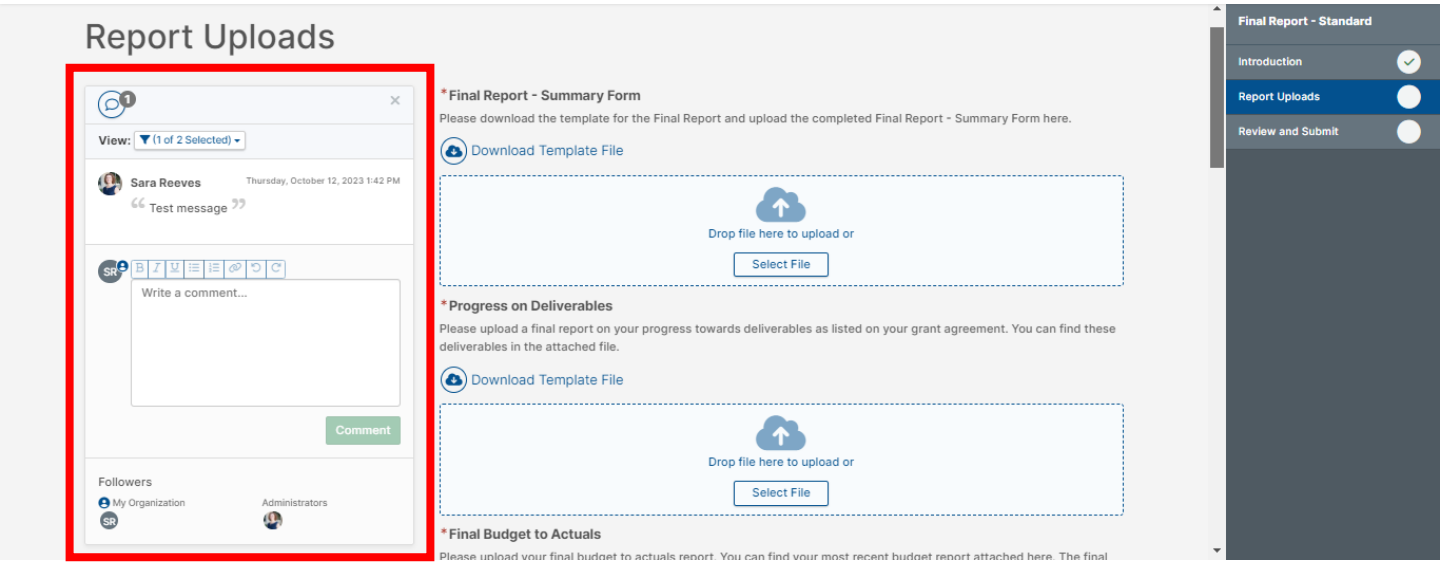
- Grant Primary Contact
- Grant Program or Project Contact
- Organization Finance Contact

You can find a record of payments made in the Grantee Portal under Active Grants.

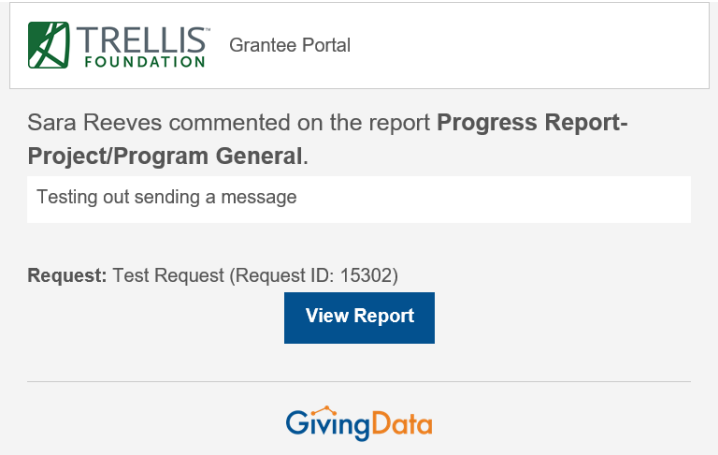
Other Portal Communications

Other communications may be sent through the Grantee Portal, such as questions or comments from the Foundation team on a submitted report. The text bubble icon on each page a report form allows you to send comments through the portal. Comments from the Foundation team sent to you through this method will also be sent as email notifications to the Portal Users assigned to the report.

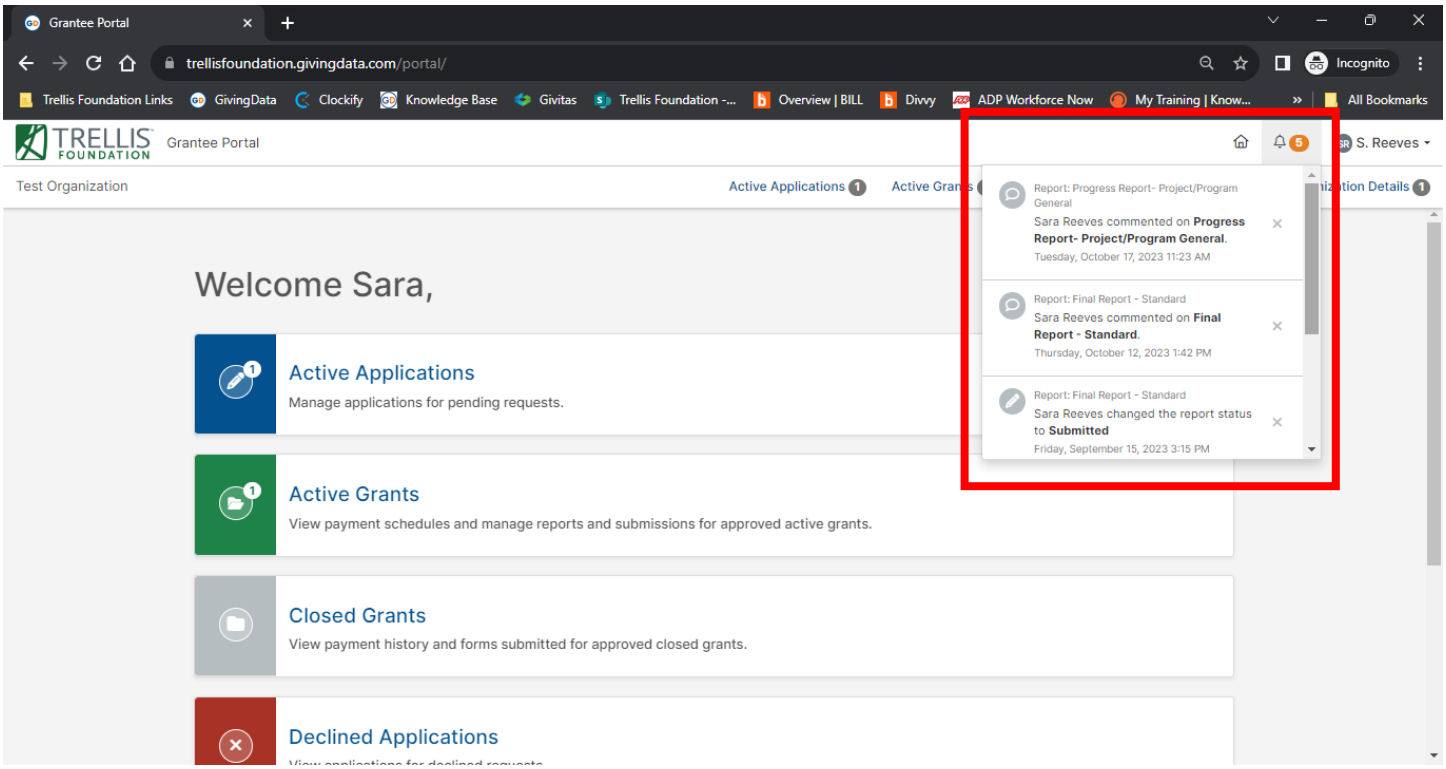




This is an example of the email you will receive when a comment is sent through the Grantee Portal:



You can also see a record of comments made in the system when you click on the **bell icon** in the upper navigation.



Note: When a report is marked as Accepted by a Foundation staff member, the comments are closed, and you will no longer see them.

Grant Reporting

Trellis Foundation asks partners to report every six months, though the exact timing of reporting may vary based on the project or program's life cycle. We want to ensure our report requests to align with your work. Please feel free to suggest reporting periods and due dates that make sense for the timeline of the work or that align with the requirements of other funders. We want to be flexible and responsive, if you need to move the date for a report, do not hesitate to contact Jeaiza at jeaiza.quinones@trellisfoundation.org. You can always find the dates for reports in Exhibit B in your grant agreement or in the Grantee Portal.

Depending on the type of grant, the progress reports typically include an update on outcomes, deliverables, metrics and/or learning questions, and total Foundation funds expensed to-date with an expense narrative. The Foundation also collects a more comprehensive narrative report at the close of each grant.[1]

When a grant is being disbursed in installments, payouts are typically scheduled to align with annual progress reports. More details on disbursements are described here.

Narrative Reports

The Foundation collects two types of narrative reports:

[1] Some grant agreements may also require a budget-to-actuals report. Details on how to complete this budget report can be found in Attachment A.

- Progress reports collected every six months (actual reporting periods and due dates may vary)
- Final reports collected at the end of the grant. This report also includes optional quantitative data reporting.

Narrative Report Templates

- Attachment A - Progress Report Questions
- Attachment B - Final Report Questions

Financial Reports

The Trellis Foundation collects budget information for learning purposes. We seek to better understand the true costs of the work in which we invest, and grant budgets help inform us. Standard Trellis Foundation grants do not require budget-to-actual reporting. Rather, grantees are asked to confirm the total amount of Foundation funds expensed to-date in each report. They are also asked to reflect on any activity changes that resulted in expense changes as part of the narrative report. [2]

However, some grants may be for discrete, time-limited work that require project-specific budgets and annual budget-to-actuals reporting. These financial reports provide additional insights into where actual activities varied from what was projected and allows us to get a full picture of the dynamic nature of the complex work you do. If your grant includes a Project Budget with budget-to-actuals reporting, this is outlined in your grant agreement. See Attachment C for details on how to complete reporting for Project Budgets.

All partners will be asked to confirm that all Trellis Foundation funds have been spent in the final report. If you will have more than $1,000 remaining on your grant at the end of the grant term, please reach out to Jeaiza at jeaiza.quinones@trellisfoundation.org as soon as possible to discuss opportunities to include other relevant expenses or to extend the grant term to complete spend down.[2]

Payments

The Trellis Foundation makes payments through BILL (bill.com). It is our preference to make electronic payments via ACH. If you prefer to be paid via check, please contact jeaiza.quinones@trellisfoundation.org.

To be paid through BILL, you must have a BILL vendor account. BILL vendor accounts are free. If your organization has an existing BILL vendor account, please provide your Payment Network ID (PNI) in the online application form for email it to jeaiza.quinones@trellisfoundation.org. You can find your organization's PNI under Settings > Profile > Network.

If you do not have a BILL Network ID, an email is sent from BILL to the Finance Contact listed in your application to set up a vendor account for electronic deposit. Please ensure the person who creates your BILL account is a representative of your organization's accounting or finance team. This account must be maintained with up-to-date banking information to ensure future, timely payments from the Trellis Foundation.

Note: If you have lost access to your organization's existing BILL vendor account, the Foundation is unable to make edits to your vendor account. Similar to a Venmo account, the Foundation can connect to you to make electronic payments, but the Foundation does not have control over your vendor account. To regain access to an account, complete this BILL form: No Active Administrator Form.

[2] This does not apply to general operating or discretionary grants.

Unless specified otherwise in your grant agreement, the first disbursement is issued within 15 days of a fully executed agreement. When the disbursement is issued, an email will be sent through GivingData notifying you that the payment has been issued. This email will be sent to the person(s) listed as the grant Primary Contact, Grant Program or Project Contact, and Finance Contact in your application.

Requesting an Amendment or Extension

We know you are operating in complex and dynamic environments and your work needs to be responsive and adaptive. This might mean making a change to your grant work that requires an amendment to our grant agreement. The most common reason is to request an extension of the grant term. You can always reach out to your program officer to discuss this, and you can submit a request for an amendment through the Grantee Portal.

Not all changes require an amendment. If you need to adjust the timing of a report deadline or deliverable, please reach out to Jeaiza at jeaiza.quinones@trellisfoundation.org at any time. Your final financial report should reflect that all Trellis Foundation funds have been spent. If you will have more than $1,000 remaining on your grant at the end of the grant term, please reach out to Jeaiza at jeaiza.quinones@trellisfoundation.org as soon as possible to discuss opportunities to extend the grant term or to identify relevant expenses that can be allocated to the grant.[3]

Grant Closeout

When a grant term has ended, Foundation staff will review all documentation related to the grant and may reach out to you with questions. If your grant agreement includes a final disbursement at the end of the grant term, this will be completed at this time. If there is more than $1,000 in unspent Foundation funds, these must be returned to the Foundation.[3] However, we will work with you first to confirm the funds cannot be expensed to support the funded work. When the Foundation closeout process is complete, you will receive a closeout letter confirming all requirements associated with the grant agreement were met.[4] This process will conclude no later than 45 days after the end of the grant term.

Branding and Publicity

The Trellis Foundation may include information about our relationship in our periodic public reports; may refer to our relationship in press releases, on social media, or in other public materials; and may also provide information relating to our relationship to others for any purpose reasonably related to our charitable purpose.

We may request information, including stories, quotes, and images, for use in our marketing and fundraising. We respect the confidentiality and dignity of you and those you serve, and we will work with you to ensure stories and quotes are shared in a mutually agreeable way. We will never share a story, quote, or images of an individual without their permission.

In general, the Foundation will tell you in advance before issuing a public communication that mentions your organization or uses its logo. There are some instances where we might not notify you in advance, such as to promote an event on social channels such as LinkedIn.

[3] This does not apply to general operating or discretionary grants.
[4] This does not apply to discretionary grants.

We also encourage you to communicate about our relationship when it is beneficial to you. It is totally at the discretion of your organization. We do ask, when possible, that you share communications, publicity, or other materials that will be made publicly available that mention the Trellis Foundation or employee of the Foundation with us in advance. When referring to the Trellis Foundation, you can find information on the use of our name, logo, etc. here. We may provide our partners with communication templates to amplify our work, such as press releases or suggested social content at the announcement of a grant award. You are welcome to use these tools as appropriate. We are happy to collaborate on grant announcements to help amplify and celebrate your work with key stakeholders.

Partner Privacy and Intellectual Property

In our efforts to advance equitable educational opportunities in Texas, the Trellis Foundation gathers, synthesizes, and disseminates information from partners and stakeholders that can inform our grant decision-making processes and inform the greater field on best practices and lessons learned.

Entities requesting funding from the Foundation may submit information about their organization's work and operations through various application processes. We may use this information in our internal grant decision making process and it may be provided to trained reviewers (such as issue-area experts or community reviewers). This information will not be used publicly in a manner that can identify an individual organization but may be used in aggregate to report on information such as the number, type, and composition of organizations seeking funding from the Foundation.

As required by law, the Foundation publishes basic information on grants awarded through its annual 990 submissions. In addition, we reserve the right to publish similar, basic grant information in other media such as the Foundation's website and annual report. Unless otherwise specified, we may also announce grant awards through public media such as blog posts, social media posts, press releases, etc. When such an announcement will include information beyond the name of the grantee institution, the grant award amount, the grant summary description (originally submitted by the grantee through its application), and general populations or regions served, we will inform the funded partner of this communication in advance.

The Foundation may also include information about our relationship with our partners in other periodic public reports; may refer to our relationship in press releases, on social media, or in other public materials; and may also provide information relating to our relationship to others for any purpose reasonably related to our charitable purpose. Most often, we seek to uplift and amplify communication already shared publicly by partners. When uplifting or amplifying publicly shared information, such as social media re-posts, we may not notify a partner in advance. We also encourage partners to communicate about our relationship when it is beneficial to them and does not require advance notice.

The Foundation is a learning organization, and it is our preference and intent to learn from our grants and partnerships. It is also our intent to share what we learn with the greater field and publicly. By accepting a grant from the Foundation, partners understand this intent for generating learning for the greater field. We ask that funded partners use reasonable efforts to license, distribute, and disseminate any Intellectual Property created with grant funds for access to other members of the higher education community on a non-exclusive, royalty-free basis when possible.

The Foundation may collect information from partners through various reporting requirements and other information requests. When appropriate, we may aggregate this information to share in public or field-facing materials. In these instances, information will not be used in a way that is identifiable to individual persons or organizations.

The Foundation may also develop public or field-facing materials to share learning that do identify individual organizations or are attributed to an individual. We will collaborate with partners in advance before issuing a public

communication that makes use of identifying information that may not already be publicly available (such as information provided through a grant application or report). We respect the confidentiality and dignity of our partners and those they serve, and we will work with partners and individuals to ensure stories and quotes are shared in a mutually agreeable way. The Foundation will never share a story, quote, or images of an individual without their permission.

Once information has been approved for dissemination, the Foundation may continue to disseminate it without additional notification to the identified partner(s). Any public information that may include a partner's name may also include a logo provided by the partner.

The Foundation does not request, collect, or use personally identifiable information (PII) other than voluntarily provided professional contact information. Funded partners should not submit this information through their applications or reports. Individuals submitting professional contact information through the Foundation's application and reporting processes, as well as through our newsletter sign up form and similar venues, permit the Foundation to use their contact information for mass and direct communications such as email newsletters, event invitations, grant announcements, etc.

Partners may always flag information as confidential and not to be shared publicly.

Email Marketing

We value privacy and want to ensure transparency in our communication practices. We occasionally send emails, newsletters, and updates as part of our commitment to providing our grantees and partners with relevant information.

Purpose: Our emails serve various purposes, including sharing Foundation updates, educational content, and event invitations.

Consent: By providing their email address via a website form, the grantee portal, direct digital correspondence with the Foundation, event registration form, or survey, individuals consent to receive these communications from us. Individuals can unsubscribe at any time by clicking the "Unsubscribe" link at the bottom of our emails.

Frequency: We strive to maintain a reasonable frequency of emails. Individuals will not receive daily spam or excessive messages from us.

Data Security: Email address is securely stored and used solely for the purposes mentioned above. We do not sell or share information with third parties.

Opt-Out: If an individual no longer wishes to receive our emails, they can click the "Unsubscribe" link or reply to any email with "Unsubscribe" in the subject line.

Trellis Foundation Use of AI

From a security perspective, AI tools, like any technology tool used to collect, store, transfer, or manipulate data, must meet the standards outlined in the Foundation's data use policies and procedures. However, there are additional considerations when employing AI-powered tools, specifically:

- Many AI tools are built on learning models that may use the provided data to train a publicly accessible model – which would not be acceptable for data considered internal, confidential, or restricted.
- The benefit of many AI tools is the generation of new content that may not be accurate, may reflect biases due to the underlying information of the model, and may not be consistent with Foundation values.

From a security perspective, Foundation staff may use any reputable AI tool or AI-supported tool to collect, store, transfer, or manipulate *public* data. However, Foundation staff may only use or allow[5] internally restricted tools (where data collect, store, transfer, or manipulate by the tool is not fed into a publicly accessible model) that are approved by the Foundation IT service provider for internal or confidential data. Heightened scrutiny will be given to tools intended for use with confidential data. Foundation staff may not use AI tools on restricted data.

From an ethical perspective, Foundation staff will not present AI content verbatim publicly. Any AI-generated content presented publicly will be reviewed (with accuracy and sources checked) and edited. When appropriate, AI-generated content shared publicly will be identified as such. Such instances include:

- When AI played a substantive role in generating analysis, making recommendations, or when information must come from a trusted or reputable source that is not cited. Content in which AI provides analysis or recommendations must be vetted and altered or cited.
- When AI-generated content is unaltered and unique (such as image generation).

Foundation staff may share un-edited, AI-generated content internally but should label it as AI-generated.

Foundation staff will not use AI-generated content in decision-making processes without first assessing the output for accuracy, bias, and Foundation values. This process includes:

- Requesting citations from the AI tool and vetting the cited sources.
- Determining if the cited sources miss important sources of information that may impact the information provided or lead to underlying bias or inaccuracies in the information provided.
- Directing the AI tool to use an internally created list of reputable and diverse sources when providing results.

[5] For example, it is common for participants in online calls to include their own AI-powered notetaking tools. Public online calls, such as open webinars, may allow reputable tools. In all other instances, Foundation staff must follow data security protocols outlined above, which may result in not allowing AI-powered tools invited by outside participants.

Attachment A – Progress Report Questions

Progress on Goals/Objectives

- Is the program/project on track to successfully complete proposed goals/objectives?
- If not, please explain. Include any adjustments needed to the interim timeline, even if you anticipate meeting final objectives on time.

Metrics/Deliverables

- Please list each metric/deliverable and provide an update on that metric/deliverable.
- Metrics/deliverables are listed in both your grant agreement and in the email reminding you of this report.
- Five metric/deliverable fields are provided, but your grant may have fewer than five metrics.

Grant Learning Questions

- If your grant agreement includes Grant Learning Questions, please provide an update to those here.

Significant Activities/Outcomes

- What do you consider to be the most significant activities or outcomes of the program/project thus far?

Obstacles

- Have you encountered any obstacles?
- If yes, do you need assistance in addressing these challenges? Or how have you addressed them?

Foundation Funds Expensed

- Please list the total amount of the Foundation grant you have expensed to date.
- Are you on track to fully expense Foundation grant funds by the end of the grant term?

Grant Changes

- Have you experienced any changes in the work including deliverables, timeline, or planned expenses?
- If you are not on track to expense Foundation funds, use this space to describe plans to expense the funds or to request support in brainstorming options.
- If changes require an amendment to the grant agreement, please include a brief description here and submit an Amendment request via the Grantee Portal.

Sustainability

- If this program/project will continue after the grant period, please update us on your efforts to secure future funding/ensure sustainability of the work (external and/or self-funding).
- Trellis Foundation does not typically provide ongoing funding through grant renewals, but we want to know about your sustainability needs. We may be able to make connections with other funders.

Meet with Trellis Foundation Staff

- Would you find it helpful to discuss the current status of the program/project with Trellis Foundation staff? If yes, a staff member will reach out to schedule with you.

Attachment B – Final Report Questions

Community and Individuals Served

- How many people did you reach or serve in each of the following categories through your grant? If you conducted a research project, how many subjects were involved in the following categories?
    - Students/children (0-12 yrs)
    - Students (13-18 yrs)
    - Students (18-24 yrs)
    - Adult learners (24+ yrs)
    - Parents
    - Faculty/instructors
    - Administrators/staff
- Of the total number of individuals served, please include numbers and percent for the following demographics:
    - Low- to moderate-income
    - Underrepresented/minority
        - African American
        - Latino/Hispanic
        - Other, please specify:
    - First-generation/parents did not graduate from college

Public Materials

- If you produced any resources or materials with Trellis Foundation funds (such as newsletters, brochures, websites, videos, report), please provide links or attachments to the most significant examples.
- If your initiative received any media coverage, please provide links or attachments to the most significant examples.
- Although it was not required as a condition of accepting funds from Trellis Foundation, did your organization undertake any activities to recognize your Trellis Foundation Grant? If yes, please indicate all the recognition activities you undertook.

Financial and In-Kind Support Leveraged

- What is the estimated value of any revenue your organization may have received as a direct result of receiving your Trellis Foundation grant?
    - Government Sources
        - Federal
        - State
        - Municipal
    - Non-Government Sources
        - Business/Corporate
        - United Way
        - Other Foundations
        - Individuals

Organizational Impact

- How did your organization benefit from your Trellis Foundation grant? Please check all that apply and provide details where required
    - Enhanced capacity to deliver services or programs
    - Increased number of partnerships/networks formed in the community; specify the number of new partnerships
    - Increased membership in your organization
    - More active organizational membership
    - Improved staff training and development
    - Enhanced technological capacity
    - Enhanced organizational and/or strategic planning
    - Increased funds raised
    - Other, please specify

Community Impact

- How did your grant benefit your community, clients, or participants? Please check all that apply.
    - Created economic opportunities in your community
    - Enhanced services, programs or events
    - Increased participation in higher education by removing barriers for low- to moderate-income students, underrepresented populations, or first-generation students
    - Enhanced volunteerism by recruiting, training, or diversifying the volunteer base
    - Enhanced organizational effectiveness

Results and Activities

- Did you achieve all, some, or none of the results you expected to achieve during the grant period?
- If you were not able to achieve all of your expected results, please indicate why by checking all the reasons that apply:
    - Delays in getting started
    - Organizational/staffing changes
    - Underestimated time to complete the work
    - Underestimated resources needed for the work
    - Loss of funding/revenue from other sources
    - Lack of community support/partnerships needed for the work
    - External factors beyond your control
    - Other, please explain:
- Do you expect the activities resulting from your grant to continue once your grant ends?
- If yes, how will this happen? (Check all that apply.)
    - Your organization will do the work as part of its regular activities within your existing budget.
    - Time-limited funding was received from other sources to continue the project. Please specify the source:
    - Ongoing funding was received from other sources to continue the project. Please specify the source:
    - Project will continue without additional funds, using volunteer support.
    - Other community organizations will take the project over, without using additional funds.
    - Other, please specify:

- If no, please indicate why the work will not continue. (Check all that apply.)
    - Project is complete; it was not intended to be ongoing.
    - Funding was not obtained to sustain the project.
    - Lack of community interest.
    - Lack of community need for the project.
    - Lack of volunteer support.
    - Other, please specify:
- Please provide a summary of efforts to obtain future funding/ensure sustainability of the project.
- If there were any unexpected results – positive or negative – from your work, please describe them.
- Please describe how your community, campus, or the people you serve benefited from your Trellis Foundation grant. In what ways did your grant improve the quality of life in your community or for the people you serve?
- Please describe the top 3-5 most valuable lessons for your organization/collaboration from this grant project.
- Please describe the top 3-5 most valuable lessons you would share with the field from this grant project.
- Do you have any new/outstanding questions or partnership needs (beyond funding) for the field or Trellis Foundation that could help inform/strengthen/scale your work?
- Please provide any additional comments or observations you wish to share related to your project and/or Trellis Foundation's grantmaking.

Progress toward Deliverables

- In addition to this summary, please provide a response for each metric/deliverable identified in your Grant Agreement.
- Please list each metric/deliverable and provide an update on that metric/deliverable.
- If your grant agreement includes Grant Learning Questions, please provide an update to those here.

Foundation Funds Expensed

- Please list the total amount of the Foundation grant you have expensed to date.
    - Note, if more than $1,000 remains, these funds must be reimbursed to the Foundation. Please communicate with us in advance to determine options for fully expensing grant funds before the end of the grant term.

Attachment C – Budget Details

PROJECT TITLE: _____

PROJECT DIRECTOR: _____

ORGANIZATION: _____

	Total Trellis Funds Requested	Year 1 Expenses (insert dates)	Year 2 Expenses (insert dates)	Year 3 Expenses (insert dates)	Year 4 Expenses (insert dates)	Year 5 Expenses (insert dates)
I. Project Personnel						
Title of each position						
Taxes and benefit costs associated with each position						
Total Personnel	$ -	$ -	$ -	$ -	$ -	$ -
II. Project Expenses						
(describe and list each item)						
Total Programmatic costs	$ -	$ -	$ -	$ -	$ -	$ -
Indirect Costs (up to 20% of direct costs)*	$ -	$ -	$ -	$ -	$ -	$ -
TOTAL EXPENSES	$ -	$ -	$ -	$ -	$ -	$ -

*Budgets submitted for projects within institutions of higher education or under fiscal sponsorship allow up to 10% indirects for the IHE or fiscal sponsor.

Budget Tab Instructions

Fill in your project title, director, and the organization name.

Replace the words "Title of each position" and "Taxes and benefit costs…" with the title of the positions funded by the grant. Put each position on its own line. Taxes and benefits can be on a separate line or incorporated into the total cost for each position. If there are more than 15 positions on the grant, insert additional rows into the spreadsheet.

For all other project expenses, replace the words "(describe and list each item)" with a category of expense. Put each category of expense on its own line. If there are more than 15 categories, insert additional rows.

Enter the total amount requested from the Foundation for each position and expense.

Replace the words "(insert dates)" with the dates of each year of the grant term. Enter the amount you anticipate spending in each year of the grant. The total from all the years should equal the total in the Funds Requested column.

The form automatically adds 20%* indirects. If you are requesting less, please adjust the Indirect Costs lines.

TRELLIS FOUNDATION

PROJECT TITLE: Test Project Title
PROJECT DIRECTOR: Test Project Director
ORGANIZATION: Test Organization

	Original Budget	Year 1 Budget	Year 1 Actuals Progress Report 2	Delta	Year 2 Budget	Year 2 Actuals Progress Report 4	Delta
I. Project Personnel							
Program Director (1 FTE)	$ 170,000.00	$ 85,000.00	$ 84,300.00	$ 700.00	$ 85,000.00		$ 85,000.00
Student Fellow (0.5 FTE)	$ 60,000.00	$ 30,000.00	$ 20,000.00	$ 10,000.00	$ 30,000.00		$ 30,000.00
Taxes & Benefits (30% for FT and 8% for PT)	$ 55,800.00	$ 27,900.00	$ 22,675.00	$ 5,225.00	$ 27,900.00		$ 27,900.00
0	$ -	$ -		$ -	$ -		$ -
0	$ -	$ -		$ -	$ -		$ -
0	$ -	$ -		$ -	$ -		$ -
0	$ -	$ -		$ -	$ -		$ -
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0	$ -	$ -		$ -	$ -		$ -
Total Personnel	**$ 285,800.00**	**$ 142,900.00**	**$ 126,975.00**	**$ 15,925.00**	**$ 142,900.00**	**$ -**	**$ 142,900.00**
II. Project Expenses					$ -		
Conference Travel	$ 2,000.00	$ 2,000.00	$ 3,200.00	$ (1,200.00)	$ -		$ -
Technical Assistance Provider	$ 20,000.00	$ 15,000.00	$ 12,000.00	$ 3,000.00	$ 5,000.00		$ 5,000.00
Publication Expenses	$ 1,500.00	$ -		$ -	$ 1,500.00		$ 1,500.00
0	$ -	$ -		$ -	$ -		$ -
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Total Programmatic costs	**$ 23,500.00**	**$ 17,000.00**	**$ 15,200.00**	**$ 1,800.00**	**$ 6,500.00**	**$ -**	**$ 6,500.00**
Indirect Costs (up to 20% of direct costs)	$ 61,860.00	$ 31,980.00	$ 28,435.00	$ 3,545.00	$ 29,880.00		$ 29,880.00
TOTAL EXPENSES	**$ 371,160.00**	**$ 191,880.00**	**$ 170,610.00**	**$ 21,270.00**	**$ 179,280.00**	**$ -**	**$ 179,280.00**

Reporting Tab Instructions

The project title, director, and organization will automatically populate from the Budget tab, as will the personnel titles and expense categories and the original budget and year budget amounts.

Report financials for each year separately.

If you are over or under spent in a year, change the amount in the budget columns for future years to reflect plans to fully expense the grant. If needed, add additional titles or expense categories. Do this on the Reporting tab. Do not change the Budget tab.