

P U L S E F O R G O O D

# Feedback-to-Funders

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## Toolkit

A complete system for translating participant feedback data into compelling, ethical, and transparent funder communications. This toolkit contains 10 ready-to-use documents covering narrative framing, outcome translation, ethical quote selection, chart design, learning language, risk disclosure, and appendix preparation — so your feedback data strengthens every grant application and funder report.

### **10 Funder Communication Documents**

Templates • Worksheets • Guidelines • Response Banks

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# Toolkit Contents

This toolkit helps you transform participant feedback into funder-ready narratives that are compelling, honest, and ethically grounded. Each document addresses a different dimension of funder communication.

**Document 1: Feedback Narrative Framing Templates** — Structures for telling the feedback story in grant reports

**Document 2: Outcome vs. Output Translation Worksheet** — Converting activity data into impact language funders value

**Document 3: Quote-Selection Guidelines** — Ethical rules for using participant voices in reports

**Document 4: Chart Pairing Guide** — Combining quantitative and qualitative data visually

**Document 5: Learning-Focused Language Examples** — Framing challenges as learning, not failure

**Document 6: “What Changed Because of Feedback” Template** — Documenting the feedback-to-action loop for funders

**Document 7: Common Funder Question Response Bank** — Ready-to-adapt answers for typical funder inquiries

**Document 8: Annual Feedback Summary Template** — Year-end feedback reporting structure for grant reports

**Document 9: Risk Disclosure Guidance** — When and how to share sensitive findings with funders

**Document 10: Appendices Checklist for Transparent Reporting** — What to include in supporting documentation

## DOCUMENT 1

# Feedback Narrative Framing Templates

*Structures for telling the participant feedback story in grant reports and funder communications*

 **INSTRUCTIONS:** Use these templates as starting structures for the narrative sections of grant reports, progress updates, and funder presentations. Each template follows a proven storytelling arc that funders respond to. Customize with your actual data. Never fabricate or embellish — these frameworks make real data more compelling, not more fictional.

## Template 1: The Listen-Learn-Act Arc

Best for: Progress reports, mid-grant updates, and quarterly summaries. This is your go-to structure.

### Structure

PARAGRAPH 1 — LISTEN: “During [period], [Organization] collected [N] anonymous feedback responses from participants across [sites/programs]. Our feedback system uses touchscreen kiosks that allow participants to share their honest experience without fear of identification or retaliation.”

PARAGRAPH 2 — LEARN: “The data revealed [key finding]. [X]% of participants rated [domain] positively, while [domain] emerged as an area for growth, with [X]% of respondents indicating [specific concern]. Open-ended feedback highlighted [theme], with participants sharing perspectives like: [ethical quote].”

PARAGRAPH 3 — ACT: “In response, [Organization] [specific action taken]. This change was implemented in [timeframe] and involved [who]. Early indicators suggest [preliminary result or monitoring plan].”

PARAGRAPH 4 — IMPACT: “Since implementing this change, [measurable outcome]. We continue to monitor participant experience through ongoing anonymous feedback collection, ensuring that our services evolve in response to the voices of the people we serve.”

## Template 2: The Equity Story

Best for: Equity-focused funders, DEI grant sections, and reports to foundations prioritizing justice.

## Structure

PARAGRAPH 1 — COMMITMENT: “[Organization] is committed to equitable service delivery. We use disaggregated anonymous feedback data to detect disparities in participant experience across [variables: race, gender, language, etc.].”

PARAGRAPH 2 — FINDING: “Analysis of [N] responses during [period] revealed a [gap size] disparity in [domain] for [affected group]. While [X]% of the overall population rated [domain] positively, only [Y]% of [affected group] reported the same.”

PARAGRAPH 3 — RESPONSE: “We responded by [specific equity-focused intervention], developed in consultation with [affected community members/staff/advisory group]. This included [concrete steps].”

PARAGRAPH 4 — PROGRESS: “In the following quarter, the gap narrowed from [X] to [Y] points. We continue to track this disparity through our equity monitoring system and are committed to closing it fully.”

## Template 3: The Continuous Improvement Story

Best for: Annual reports, reaccreditation narratives, and funders who value organizational learning.

## Structure

PARAGRAPH 1 — SYSTEM: “[Organization] operates a continuous feedback loop powered by anonymous participant feedback. [N] responses were collected this year across [sites/programs], creating a real-time picture of participant experience.”

PARAGRAPH 2 — TRENDS: “Year-over-year, [positive trend]. At the same time, [area of challenge] remained a consistent theme. Rather than viewing this as a failure, we treat persistent feedback as a signal that our current approach needs deeper examination.”

PARAGRAPH 3 — ADAPTATION: “This year, we made [N] specific changes driven by feedback data, including [list 2-3 concrete examples]. [X] of these changes have already shown measurable improvement in subsequent feedback cycles.”

PARAGRAPH 4 — MATURITY: “Our feedback system is now in its [Nth] year. The volume and depth of participant engagement continues to grow, reflecting increased trust in the anonymity and impact of the process.”

## Narrative Dos and Don'ts

DO	DON'T
Lead with data, then illustrate with quotes	Lead with a single dramatic story and backfill with numbers
Acknowledge areas for growth honestly	Only report positive findings (funders see through this)
Use specific numbers (“78% rated...”)	Use vague language (“most participants felt...”)
Credit participant voice as the driver of change	Position the organization as the hero of every story
Show the feedback loop: heard → acted → improved	Present data without showing what you did with it
Note sample sizes and limitations	Present small samples as if they're definitive

## DOCUMENT 2

# Outcome vs. Output Translation Worksheet

*Converting activity metrics into impact language funders actually value*

**INSTRUCTIONS:** *Funders want to know what CHANGED, not just what you DID. Outputs are activities (we collected 500 surveys). Outcomes are changes (participant-reported safety increased 15%). This worksheet helps you translate your feedback data from outputs into outcomes — the language that moves funding decisions.*

## The Critical Distinction

OUTPUT (What You Did)	OUTCOME (What Changed)
Collected 500 anonymous feedback responses	Achieved 87% positive satisfaction rating across 500 respondents
Installed 3 feedback kiosks at service sites	Created an accessible, psychologically safe channel that 500+ participants used voluntarily
Reviewed feedback data monthly	Identified and resolved 4 service gaps within 30 days of detection
Made 6 changes based on feedback	Participant-reported satisfaction in affected areas improved by an average of 18%
Trained 25 staff on the feedback system	Staff engagement with feedback results reached 92%, with zero punitive uses of data
Published quarterly feedback reports	Closed the feedback loop with participants, increasing response rates by 23% year-over-year

## Translation Worksheet

For each feedback activity, translate it into outcome language:

YOUR OUTPUT (ACTIVITY)	EVIDENCE FROM FEEDBACK DATA	YOUR OUTCOME (CHANGE)	FUNDER-READY SENTENCE


## Outcome Sentence Starters

Use these sentence starters to convert data points into outcome language:

DATA POINT	SENTENCE STARTER
Overall satisfaction score	“Participant-reported satisfaction reached [X]%, reflecting [context].”
Score improvement over time	“[Domain] scores improved from [X] to [Y] over [period], a [Z] % increase driven by [intervention].”
Equity gap narrowing	“The experience gap for [group] narrowed from [X] to [Y] points following [intervention], demonstrating progress toward equitable service delivery.”
Response rate growth	“Participant engagement with the feedback system grew [X]%, indicating increased trust in the process.”
Action taken from feedback	“[N] service improvements were implemented directly from participant feedback, resulting in [measurable change].”
Open-ended theme	“Participants consistently identified [theme] as a strength/concern, leading to [organizational response].”
Safety indicator	“[X]% of participants reported feeling safe, [up/down] from [Y] % in the prior period.”

## The “So What?” Test

### Apply This Test to Every Data Point Before Including It in a Report

After writing any data statement, ask: “So what?”

WEAK: “We collected 412 responses this quarter.” → So what?

BETTER: “412 participants chose to share their experience anonymously, a 15% increase over last quarter.” → So what?

STRONG: “412 participants voluntarily shared feedback — a 15% increase that reflects growing trust in the system. Their input directly informed 3 service changes this quarter.”

The strong version answers “So what?” twice: why the number matters AND what it led to.

## DOCUMENT 3

# Quote-Selection Guidelines for Ethical Storytelling

*Rules for using participant voices in funder reports without causing harm*

 **INSTRUCTIONS:** Participant quotes bring feedback data to life. But quotes from anonymous surveys carry ethical responsibilities: participants didn't consent to having their words published, even anonymously. These guidelines ensure you use quotes ethically, selecting them to represent patterns rather than cherry-picking for dramatic effect.

## The 7 Rules of Ethical Quote Selection

RULE	WHAT IT MEANS	EXAMPLE
1. Represent patterns, not outliers	Only use quotes that reflect themes seen across multiple responses. Never use a dramatic one-off to represent the whole.	✓ Use a quote about safety if 30% of responses mention safety. ✗ Don't use a shocking single quote that no one else echoed.
2. Never alter wording	Use the participant's exact words. Do not "clean up" grammar, add emphasis, or paraphrase presented as a quote.	✓ "staff is real nice here" ✗ "Staff are really nice here" (edited)
3. Remove identifying details	Strip names, dates, specific incidents, or details that could identify the respondent, even indirectly.	✓ "I felt heard by the people here" ✗ "I felt heard by Sarah on Tuesday night"
4. Balance positive and constructive	If you include positive quotes, also include constructive ones. Cherry-picking only positives undermines credibility.	Include at least 1 constructive quote for every 3 positive quotes.
5. Context over drama	Choose quotes that illuminate the experience, not quotes that maximize emotional impact for fundraising.	✓ "The counselors actually listen" ✗ "This place saved my life" (unless this is a pattern)
6. Never attribute identity	Do not label quotes with demographic markers unless the participant explicitly self-identified AND the identity is relevant.	✓ "— Anonymous participant" ✗ "— Hispanic female, age 34"
7. Pair with data	Every quote should accompany a data point. The data tells the story; the quote humanizes it.	✓ "82% rated staff respect positively. As one participant shared: 'They treat me like a

		person.”
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## Quote Selection Worksheet

CANDIDATE QUOTE	REFLECTS A PATTERN? (Y/N)	IDENTIFYING INFO REMOVED?	PAIRED WITH DATA POINT?	INCLUDE?
	Y / N	Y / N	Y / N	Y / N
	Y / N	Y / N	Y / N	Y / N
	Y / N	Y / N	Y / N	Y / N
	Y / N	Y / N	Y / N	Y / N
	Y / N	Y / N	Y / N	Y / N
	Y / N	Y / N	Y / N	Y / N

## Attribution Format

Always attribute quotes using one of these formats:

FORMAT	WHEN TO USE
“[Quote]” — Anonymous participant	Default for all quotes
“[Quote]” — Anonymous participant, [Program Name]	When the program context is relevant and the program is large enough to protect identity
“[Quote]” — Anonymous feedback, [Quarter Year]	When timeframe context matters

### Never Do These

- ✘ Never use a quote that a participant could recognize as their own in a public document
- ✘ Never combine multiple participants' words into a single composite quote
- ✘ Never use quotes from fewer than 20 total respondents (risk of identification is too high)
- ✘ Never use a quote that describes a specific, identifiable incident
- ✘ Never present a quote as representative when it is actually unique to one person

## DOCUMENT 4

# Chart Pairing Guide

*Combining quantitative data and qualitative feedback for maximum funder impact*

 **INSTRUCTIONS:** *Data alone is cold. Quotes alone are anecdotal. Together, they're credible and compelling. This guide shows you how to pair chart types with qualitative data for each common reporting scenario. Use it when designing the visual sections of grant reports, presentations, and dashboards.*

## The Golden Rule

### Numbers Tell, Quotes Show, Together They Convince

Every data visualization in a funder report should be accompanied by at least one participant quote that humanizes the finding. The chart provides credibility; the quote provides connection. Neither is sufficient alone.

## Pairing Matrix

WHAT YOU'RE SHOWING	BEST CHART TYPE	QUALITATIVE PAIRING	EXAMPLE LAYOUT
Overall satisfaction scores	Horizontal bar chart or gauge	1-2 representative positive quotes + 1 constructive quote	Bar chart on left, quote callout box on right
Trends over time	Line chart (quarterly)	Quote from most recent quarter illustrating the trend	Line chart spanning page width, quote below as a caption
Category comparison (staff, safety, food, etc.)	Grouped bar chart or radar chart	One quote per top/bottom category	Chart centered, quotes in callout boxes pointing to relevant bars
Score distribution	Stacked bar or pie chart	Quote representing the majority segment + one from a minority segment	Chart on left, two quotes stacked on right
Before/after comparison	Side-by-side bars or arrow chart	Quote from after period showing the change was felt	Before bar → After bar with quote bridging them
Equity gaps	Gap chart or grouped bars by subgroup	Quote from the affected group (ethically selected)	Chart on top, quote below with note on sample size
Open-ended	Word cloud or	2-3 representative	Theme chart on left,

themes	theme frequency bar chart	quotes from the top themes	quotes on right organized by theme
Response volume / participation	Simple line chart or big number callout	Quote about trust in the system or willingness to share	Big number centered, quote as supporting caption

## Chart Design Principles for Funder Reports

<input type="checkbox"/>	Every chart has a clear, descriptive title (“Participant-Reported Safety Scores, Q1-Q4 2025” not just “Safety Scores”)
<input type="checkbox"/>	Axis labels are in plain language (not variable codes or abbreviations)
<input type="checkbox"/>	Sample size (N) is visible on or near every chart
<input type="checkbox"/>	Color palette is accessible (colorblind-friendly; avoid red/green alone as differentiators)
<input type="checkbox"/>	Charts use no more than 5-7 data points per visualization (simplicity wins)
<input type="checkbox"/>	Every chart includes a 1-2 sentence interpretive caption underneath (“This chart shows...”)
<input type="checkbox"/>	Trend charts include context for any significant changes (“The increase in Q3 followed the addition of...”)
<input type="checkbox"/>	Charts never present percentages calculated from fewer than 20 responses
<input type="checkbox"/>	Branding is consistent but subtle — the data is the star, not the logo

## Layout Template

For each page or section of your funder report, follow this layout pattern:

ELEMENT	PLACEMENT	PURPOSE
Section headline	Top of page	Orients the reader to the topic
Data chart	Left or center, 50-60% of page width	Provides the quantitative evidence
Key finding callout	Bold text above or beside chart	States the insight in one sentence
Participant quote(s)	Right side or below chart, in a styled callout box	Humanizes the data point
Interpretive caption	Below the chart, in smaller text	Explains what the chart shows and why it matters
Action note	Bottom of section	States what was done in response (links to Document 6)

## DOCUMENT 5

## Learning-Focused Language Examples

*Framing challenges as learning and growth — not failure — in funder communications*

 **INSTRUCTIONS:** Funders increasingly value honesty about challenges over polished-only narratives. But there's an art to discussing difficulties in a way that demonstrates organizational maturity rather than organizational failure. This document provides ready-to-use language for the most common "hard to talk about" scenarios in feedback reporting.

### Core Principle

#### Honest + Proactive = Trustworthy

Funders fund organizations they trust. Trust comes from honesty about what's working AND what isn't, combined with evidence of proactive response. An organization that acknowledges challenges and shows a plan is more fundable than one that claims everything is perfect.

### Language Transformations

INSTEAD OF THIS (Defensive)	USE THIS (Learning-Focused)
"Our satisfaction scores dropped due to factors beyond our control."	"Satisfaction scores declined [X]% this quarter, which prompted us to investigate root causes. We identified [finding] and have implemented [response]."
"The negative feedback was from a small number of dissatisfied participants."	"While overall satisfaction remained strong at [X]%, a subset of participants raised concerns about [area]. We are taking these signals seriously by [action]."
"We didn't receive enough responses to draw conclusions."	"Response rates for [population] were lower than expected, which itself is a finding. We are redesigning our outreach to improve accessibility and trust for this group."
"Participants don't always understand what we're trying to do."	"Feedback revealed a communication gap between our intent and participant experience. We are revising how we explain [service] to ensure clarity."
"We can't address every piece of feedback."	"We use a structured prioritization process (impact vs. effort matrix) to ensure the highest-impact feedback receives attention first, while monitoring all themes for emerging patterns."

“Some staff were resistant to the feedback system.”	“Staff adoption required intentional change management, including training, transparent data sharing, and demonstrating that feedback leads to support rather than punishment.”
“The equity data was inconclusive.”	“Initial equity analysis revealed emerging signals that require further data collection before we can draw reliable conclusions. We have set targets for increased outreach to underrepresented groups.”
“We failed to close the feedback loop with participants.”	“We learned that participants need to see visible evidence that their feedback leads to change. We have implemented ‘What We Heard’ posters and quarterly updates to close this gap.”

## Phrases That Signal Maturity

Drop these phrases into your funder narratives to signal organizational sophistication:

<input type="checkbox"/>	“The data challenged our assumptions about...”
<input type="checkbox"/>	“We used this finding to redesign our approach to...”
<input type="checkbox"/>	“This feedback confirmed what frontline staff had been observing...”
<input type="checkbox"/>	“We are monitoring this trend and will report progress in the next cycle.”
<input type="checkbox"/>	“The gap between our intent and participant experience revealed an opportunity to...”
<input type="checkbox"/>	“Our continuous feedback system allows us to detect and respond to issues in near-real-time.”
<input type="checkbox"/>	“We treat persistent feedback themes as signals for systemic change, not one-off fixes.”
<input type="checkbox"/>	“Participant voice is embedded in our decision-making process at the leadership level.”

## DOCUMENT 6

# “What Changed Because of Feedback” Template

*Documenting the complete feedback-to-action loop for funders*

 **INSTRUCTIONS:** *This is the single most powerful document in your funder toolkit. Funders want proof that feedback isn't just collected — it's used. This template creates a clear chain from feedback data to organizational action to measurable result. Complete one entry for each significant change, then compile into a section of your grant report.*

## Change Documentation Template

FIELD	YOUR CONTENT
Change Title	[Short, descriptive: e.g., “Improved Intake Wait Times”]
Feedback Source	[Survey period, # of responses, specific question(s)]
What Participants Told Us	[1–2 sentences summarizing the feedback trend, with data: “38% of participants rated wait times as ‘too long’...”]
Participant Quote (optional)	[“Quote” — Anonymous participant. Follow Document 3 guidelines.]
What We Did	[Specific action taken, who was involved, timeline]
Resources Invested	[Budget, staff time, training, materials — shows funders their money at work]
What Changed	[Measurable outcome: “Wait time satisfaction improved from 62% to 84% the following quarter.”]
Ongoing Monitoring	[How you're tracking continued improvement]

## Example: Completed Entry

### **EXAMPLE: Improved Common Area Comfort**

*Feedback Source: Q2 2025 survey, 247 responses*

*What Participants Told Us: 42% of respondents rated common area comfort below average. Open-ended feedback mentioned lighting, seating, and noise.*

*Participant Quote: “The chairs are broken and the lights give me a headache.” — Anonymous participant*

*What We Did: Staff brainstorming session led to new LED lighting, 12 replacement chairs, and a designated quiet zone. Total investment: \$340 from operational budget.*

*Resources Invested: \$340 materials + 8 staff hours for setup*

*What Changed: Comfort scores improved from 3.1 to 4.2 out of 5 in Q3 2025 (35% improvement). Negative comments about the common area dropped to near zero.*

*Ongoing Monitoring: Common area comfort is tracked quarterly. Scores have maintained at 4.0+ for two consecutive quarters.*

## Compilation Guide

For your annual funder report, compile 3–5 of your strongest change entries into a “Feedback in Action” section. Select entries that:

<input type="checkbox"/>	Span different service areas (not all about the same topic)
<input type="checkbox"/>	Include at least one equity-focused change
<input type="checkbox"/>	Include at least one low-cost change (shows resourcefulness)
<input type="checkbox"/>	Include at least one change with clear before/after data
<input type="checkbox"/>	Represent different feedback types (quantitative scores AND open-ended themes)

## DOCUMENT 7

# Common Funder Question Response Bank

*Ready-to-adapt answers for the questions funders most frequently ask about feedback*

 **INSTRUCTIONS:** *Funders ask predictable questions. Being prepared with thoughtful, data-informed responses demonstrates professionalism and builds confidence. Customize these templates with your specific data. Use them in grant applications, site visits, phone calls, and written reports.*

## About Your Feedback System

FUNDER QUESTION	TEMPLATE RESPONSE
“How do you collect participant feedback?”	We use anonymous touchscreen kiosks powered by Pulse For Good placed at our service locations. Participants complete a short survey (~2 minutes) without providing any identifying information. The system collects both quantitative ratings and open-ended comments, which are analyzed for trends and acted on through a structured prioritization process.
“How do you ensure anonymity?”	No names, logins, or identifying information are collected. The kiosk does not track IP addresses or create user profiles. Responses are reported in aggregate only, and we apply data suppression rules when subgroup sizes are small enough to risk re-identification. Our staff are trained never to watch the kiosk or ask participants what they wrote.
“What is your response rate?”	During [period], we collected [N] responses across [sites/programs], representing approximately [X]% of our active participant population. Response rates have [increased/remained stable] over time, which we interpret as a positive indicator of participant trust in the system.
“How do you know the feedback is honest?”	Research consistently shows that anonymity increases honesty in feedback. Our response patterns — including the presence of both positive and constructive feedback, with constructive themes that correlate with known operational challenges — indicate participants are sharing authentic experiences.

## About Your Results

FUNDER QUESTION	TEMPLATE RESPONSE
“What are your key findings?”	During [period], [X]% of participants rated their overall experience positively. Our top-performing areas were

	[domains]. Areas identified for improvement include [domains], where we have implemented [specific actions]. The most common open-ended theme was [theme].
“How do you handle negative feedback?”	We treat negative feedback as actionable intelligence. Every piece of feedback is triaged for urgency, scored for impact and effort, and routed to the appropriate action lane. Safety-related feedback is addressed within 24 hours. Other concerns are prioritized through our quarterly impact/effort matrix and assigned to specific owners with deadlines.
“Do you track equity in your feedback?”	Yes. We disaggregate feedback data by [variables] when sample sizes are sufficient to do so responsibly. We apply an equity-weighted prioritization lens to ensure that feedback from historically marginalized populations receives proportionate attention. When equity gaps are detected, we track them across quarters until they narrow.
“What changed because of participant feedback?”	[Refer to Document 6 entries.] During [period], we implemented [N] changes directly from feedback data, including [2-3 specific examples]. These changes resulted in measurable improvements including [specific outcome data].

## About Challenges

FUNDER QUESTION	TEMPLATE RESPONSE
“What challenges have you faced with the feedback system?”	Our primary challenges include [e.g., building initial staff trust, achieving representative response rates from all populations, and maintaining momentum after the first year]. We’ve addressed these through [specific strategies], and we continue to refine our approach based on what we learn.
“How do you address low response rates from specific populations?”	When we detect underrepresentation, we investigate barriers — which may include survey accessibility, language, kiosk placement, or trust. We then implement targeted strategies such as [multilingual surveys, relocated kiosks, staff training, community partnerships] and track whether representation improves.
“How do you prevent staff from gaming the system?”	Our safeguards include anonymous collection (staff cannot identify respondents), aggregate-only reporting, a policy prohibiting punitive use of feedback data, and regular staff training. We also monitor for statistical anomalies that might indicate interference. Our staff buy-in toolkit emphasizes that feedback is for improvement, not surveillance.

## DOCUMENT 8

# Annual Feedback Summary Template

*A structured year-end feedback report for inclusion in grant reports and board presentations*

 **INSTRUCTIONS:** Use this template to create your annual feedback summary. It's designed to be included as a standalone section in grant reports or as a board-ready document. Complete every section. If you don't have data for a section, note that and explain why — transparency about gaps is better than omission.

## Section 1: Year at a Glance

METRIC	THIS YEAR	LAST YEAR	CHANGE
Total feedback responses collected			
Number of active kiosk sites			
Overall satisfaction (% positive)			
Top-rated domain			
Lowest-rated domain			
Number of actions taken from feedback			
Number of equity gaps identified			
Number of equity gaps narrowed/closed			
Average completion time (survey)			
Response rate trend			

## Section 2: Key Findings Narrative

Write 2-3 paragraphs using the Listen-Learn-Act arc (Document 1, Template 1). Include:

<input type="checkbox"/>	Total responses collected and trend vs. prior year
<input type="checkbox"/>	Top 3 positive themes from the data
<input type="checkbox"/>	Top 2-3 areas for improvement

<input type="checkbox"/>	At least one representative participant quote (following Document 3 guidelines)
<input type="checkbox"/>	Any notable equity findings (or note if equity analysis was not yet possible)

### Section 3: Feedback-to-Action Summary

List 3–5 concrete changes made based on feedback this year. Use the Document 6 template for each:

CHANGE	FEEDBACK SOURCE	ACTION TAKEN	MEASURABLE RESULT

### Section 4: Equity Analysis Summary

EQUITY METRIC	FINDING
Variables disaggregated	[List: race, gender, language, etc.]
Groups meeting reporting threshold	[List groups with sufficient N]
Equity gaps identified	[Number and brief description]
Gaps narrowed this year	[Number and brief description]
Gaps persisting	[Number and plan]
Groups below threshold (monitored)	[List groups with insufficient N, and plan to increase]

### Section 5: Methodology & Limitations

Funders respect transparency about your data's strengths and limitations:

ELEMENT	YOUR DESCRIPTION
Collection method	[Touchscreen kiosk, anonymous, voluntary, ~2 minutes]
Survey instrument	[Number of questions, question types, visual scales used]
Analysis approach	[Aggregate trends, quarterly comparison, equity disaggregation]
Known limitations	[e.g., self-selection bias, populations underrepresented,

	seasonal variation]
Efforts to address limitations	[e.g., multilingual surveys, kiosk placement adjustments, targeted outreach]

## Section 6: Looking Ahead

Close with a forward-looking statement that connects feedback to your strategic direction:

### Template

“In [next year], [Organization] will continue to use participant feedback as a cornerstone of our service improvement strategy. Specific priorities include [2–3 focus areas drawn from this year’s data]. We will expand our equity analysis to include [new variables or populations], and we are committed to increasing response rates among [underrepresented group]. Our goal is to ensure that every participant’s voice informs the services they receive.”

## DOCUMENT 9

# Risk Disclosure Guidance for Sensitive Findings

*When and how to share difficult feedback findings with funders*

 **INSTRUCTIONS:** Some feedback findings are sensitive: declining scores, safety concerns, equity gaps, staff issues. This guide helps you decide when to disclose to funders, how to frame the disclosure, and how to protect participants and staff in the process. The core principle: funders should never be surprised by information they should have known.

## The Disclosure Decision Framework

FINDING TYPE	DISCLOSE TO FUNDERS?	WHEN	HOW
Declining satisfaction scores	Yes — proactively	In the next scheduled report	Frame as a finding you detected through your monitoring system, with your response plan
Safety concern identified in feedback	Yes — immediately if serious	Within the reporting cycle; immediately if there's an ongoing risk	Describe what was found, what was done, and current status. Emphasize that the system WORKED by detecting it.
Equity gap detected	Yes — proactively	In the next report, or sooner if the funder is equity-focused	Frame as evidence of your equity analysis capability. Show the gap AND your response.
Staff-related concerns in feedback	Use judgment	Disclose the theme, not individual staff details	Frame as an organizational development opportunity, not a personnel issue.
Very low response rates	Yes — with context	In the next scheduled report	Explain what you believe caused it and what you're doing to improve. Low rates are a finding, not a failure.
Data too thin to draw conclusions	Yes — transparently	In the next report	Describe the limitation and your plan to address it. Never fabricate confidence from thin data.
Finding that contradicts your grant proposal	Yes — carefully	In the next report	Frame as "What we've learned that updates our initial assumptions." Show adaptability.

## Framing Sensitive Disclosures

Use this 4-part structure for any sensitive finding:

### The FIND-ACT-TRACK-SHARE Framework

1. FIND: “Our feedback monitoring system detected [finding].” (The system works — this is a strength.)
2. ACT: “We responded by [specific action] within [timeframe].” (We’re proactive — this is a strength.)
3. TRACK: “We are monitoring [metric] to assess whether the response is effective.” (We’re accountable — this is a strength.)
4. SHARE: “We are disclosing this finding because transparency with our funders is foundational to our partnership.” (We’re trustworthy — this is a strength.)

Notice: every element positions a difficult finding as evidence of organizational maturity.

## What NOT to Disclose

### ⚠️ Protect These in All Funder Communications

- ✗ Individual participant responses, quotes that could identify someone, or raw response data
- ✗ Specific staff names or identifying details connected to negative feedback
- ✗ Subgroup data below suppression thresholds (see Equity Toolkit, Document 4)
- ✗ Details of mandatory reporting incidents that are under investigation
- ✗ Participant demographic information that could be cross-referenced to identify individuals
- ✗ Internal staff conflicts about the feedback system itself

## Pre-Disclosure Checklist

<input type="checkbox"/>	The finding has been verified (not a single data point or anecdote)
<input type="checkbox"/>	The response plan is already in progress (never disclose a problem without a plan)
<input type="checkbox"/>	Participant anonymity is fully protected in the disclosure
<input type="checkbox"/>	Staff are not identifiable from the information shared
<input type="checkbox"/>	The framing uses the FIND-ACT-TRACK-SHARE structure
<input type="checkbox"/>	The disclosure has been reviewed by a second person for tone and accuracy
<input type="checkbox"/>	You have considered: “Would I want to know this if I were the funder?” (If yes, disclose.)

<input type="checkbox"/>	The disclosure is proportionate to the severity (don't over-alarm for minor dips)
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## DOCUMENT 10

## Appendices Checklist for Transparent Reporting

*What supporting documentation to include with funder reports for maximum credibility*

 **INSTRUCTIONS:** Appendices transform a good report into a trustworthy one. They allow funders to verify your claims, understand your methods, and see the depth behind your summaries. Not every funder will read them, but knowing they're there builds confidence. Use this checklist to assemble your appendices package.

### Required Appendices (Include with Every Report)

APPENDIX	WHAT TO INCLUDE	WHY FUNDERS WANT IT	READY?
A. Survey Instrument	Full copy of the survey questions and response options currently in use	Proves you're measuring what you claim to measure	<input type="checkbox"/>
B. Methodology Summary	Collection method, anonymity protections, analysis approach, reporting thresholds, suppression rules	Establishes credibility of your data	<input type="checkbox"/>
C. Response Summary Table	Total responses, response rate, completion rate, breakdown by site/program/period	Shows the volume and reach of your feedback system	<input type="checkbox"/>
D. Score Summary Table	Average scores for each survey question, overall and by period, with trend arrows	Provides the evidence behind your narrative	<input type="checkbox"/>
E. Action Log	Complete list of actions taken from feedback this period, using Document 6 format	Proves feedback leads to action, not just data collection	<input type="checkbox"/>

### Recommended Appendices (Include When Available)

APPENDIX	WHAT TO INCLUDE	WHY FUNDERS WANT IT	READY?
F. Equity Analysis Summary	Disaggregated data, identified gaps, suppressed groups noted, interventions underway	Shows commitment to equitable service delivery	<input type="checkbox"/>
G. Trend Charts	Quarter-over-quarter or year-over-year visual trends for key metrics	Shows trajectory, not just a snapshot	<input type="checkbox"/>
H. Open-Ended	Top themes from qualitative	Provides depth beyond	<input type="checkbox"/>

Theme Summary	data, with frequency counts and representative quotes	the numbers	
I. Staff Engagement Summary	Staff adoption metrics, training completion, feedback review participation	Shows organizational buy-in	<input type="checkbox"/>
J. Prioritization Documentation	Summary of the prioritization process used, items prioritized and why, items deferred and why	Demonstrates strategic resource allocation	<input type="checkbox"/>

## Optional Appendices (For Comprehensive Reporting)

APPENDIX	WHAT TO INCLUDE	WHEN TO INCLUDE
K. Participant Communication Examples	Photos/copies of “What We Heard” posters, signage, or participant-facing updates	When funders value participant engagement
L. Success Stories	1–2 completed success story templates (Staff Toolkit, Document 9)	When funders appreciate narrative evidence
M. Risk Disclosure Summary	Summary of any sensitive findings disclosed per Document 9 framework	When the report includes challenging findings
N. Translation/Accessibility Documentation	Languages available, accessibility accommodations, literacy-level testing results	When funders prioritize access and inclusion
O. Benchmark Comparisons	Your scores compared to peer organizations or national benchmarks (if available)	When funders want context for your numbers

## Appendix Quality Checklist

<input type="checkbox"/>	Every appendix is referenced at least once in the main report body (“see Appendix B for methodology details”)
<input type="checkbox"/>	All data in appendices matches the data cited in the narrative (no contradictions)
<input type="checkbox"/>	Sample sizes are noted on every data table and chart
<input type="checkbox"/>	Suppression rules have been applied to all disaggregated data
<input type="checkbox"/>	No individual participant can be identified from any appendix content
<input type="checkbox"/>	Appendices are clearly labeled and in a logical order
<input type="checkbox"/>	A table of appendices is included at the beginning of the appendix section
<input type="checkbox"/>	File formats are funder-friendly (PDF preferred; no proprietary formats without alternatives)
<input type="checkbox"/>	The total appendix package does not exceed what the funder requires (check grant guidelines)

## Final Assembly Checklist

Before submitting your funder report with appendices:

<input type="checkbox"/>	Main report narrative is complete and reviewed
<input type="checkbox"/>	All required appendices are assembled
<input type="checkbox"/>	All recommended appendices that are available are included
<input type="checkbox"/>	Cross-references between narrative and appendices are accurate
<input type="checkbox"/>	Page numbers or section labels are consistent throughout
<input type="checkbox"/>	A second reviewer has checked for accuracy, tone, and completeness
<input type="checkbox"/>	The complete package has been saved as a single PDF (or per funder requirements)
<input type="checkbox"/>	A copy has been filed internally for institutional memory

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## End of Toolkit

For implementation support, contact your Pulse For Good account manager or visit [pulseforgood.com](http://pulseforgood.com)

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