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

Feedback

Governance Toolkit

A complete governance framework for managing anonymous participant feedback as organizational infrastructure. This toolkit contains 10 ready-to-use documents covering role definitions, decision rights, lifecycle management, meeting cadences, accountability tracking, data access controls, policy templates, health assessments, leadership reporting, and annual review — so your feedback system runs on structure, not individual heroics.

10 Governance Documents

Matrices • Frameworks • Policies • Assessment Tools

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Toolkit Contents

This toolkit establishes the governance infrastructure for your participant feedback system. Governance answers the questions that enthusiasm alone cannot: who owns what, who decides what, how data flows, who sees it, and how the system sustains itself when champions move on.

DOCUMENT 1

Feedback Ownership & Role Definition Matrix

Defining who does what across every stage of the feedback lifecycle

📋 **INSTRUCTIONS:** *Complete this matrix before launching your feedback system, and review it annually (Document 10). Every function must have a named owner. If a function has no owner, it will not get done — and the system will erode. Functions without clear ownership are the single biggest predictor of feedback system failure.*

Core Principle

If Nobody Owns It, Nobody Does It

Feedback systems don't fail because the technology breaks. They fail because no one is responsible for the ongoing work: reviewing data, closing loops, maintaining quality, reporting to leadership. This matrix makes every responsibility visible and assigned.

Role Definitions

ROLE	DESCRIPTION	TYPICAL TITLE(S)
Feedback System Owner	Single point of accountability for the entire feedback system. Ensures all functions are performed, escalates when they're not.	Quality Director, Program Director, Data Lead
Data Analyst	Prepares feedback summaries, runs disaggregation, identifies trends and red flags.	Data Analyst, Quality Coordinator, Research Associate
Site Champion	On-the-ground contact at each kiosk location. Monitors kiosk function, answers staff questions, promotes participation.	Site Supervisor, Program Manager, Lead Case Manager
Prioritization Lead	Facilitates prioritization meetings, maintains the action tracker, follows up on commitments.	Quality Director, Program Director
Executive Sponsor	Senior leader who champions the system, removes barriers, secures budget, and models data use.	Executive Director, COO, VP of Programs
Equity Reviewer	Reviews disaggregated data for equity gaps, applies equity lens, flags concerns.	DEI Lead, Community Liaison, Program Director
Funder Liaison	Translates feedback data into funder-ready narratives and reports.	Grants Manager, Development Director
Crisis Contact	Primary responder for red-flag feedback.	Clinical Director,

	Available for same-day escalation.	Program Director, On-Call Supervisor

Function-to-Role Assignment Matrix

FUNCTION	OWNER (NAME)	ROLE	BACKUP	FREQUENCY
Survey design and updates				Annually + as needed
Kiosk maintenance and uptime				Daily monitoring
Data download and preparation				Weekly / Monthly
Red-flag monitoring and triage				Every data review
Feedback summary report creation				Monthly / Quarterly
Prioritization meeting facilitation				Quarterly
Action item tracking and follow-up				Ongoing
Equity analysis and reporting				Quarterly
Staff communication about results				After each review
Participant communication (“What We Heard”)				Quarterly
Funder/grant reporting				Per grant schedule
Leadership briefing				Quarterly
Crisis/high-risk response				As needed
Annual governance review				Annually
Staff onboarding and training				New hires + annually
System budget management				Annually

Vacancy Risk Assessment

For each critical function, ask: what happens if this person leaves?

FUNCTION	CURRENT OWNER	BACKUP TRAINED?	DOCUMENTATION EXISTS?	RISK IF VACANT
Feedback System Owner		Y / N	Y / N	Critical
Data Analyst		Y / N	Y / N	
Crisis Contact		Y / N	Y / N	Critical
Prioritization Lead		Y / N	Y / N	
Executive Sponsor		Y / N	Y / N	Critical

DOCUMENT 2

Decision Rights Framework

Who decides what, and through what process — eliminating ambiguity before it causes paralysis

📋 **INSTRUCTIONS:** *Unclear decision rights are the second biggest predictor of feedback system failure (after unclear ownership). When no one knows who gets to decide, decisions either don't get made or get made by whoever happens to be loudest. This framework assigns every common decision to a specific role and process.*

Decision Categories

DECISION	WHO DECIDES	PROCESS	ESCALATION IF DISAGREEMENT
What questions to include on the survey	Feedback System Owner, with input from program and clinical staff	Annual survey review meeting. Owner makes final call.	Executive Sponsor
Where to place kiosks	Site Champion, approved by Feedback System Owner	Site assessment; owner approves	Feedback System Owner
How often to review data	Feedback System Owner	Set at system launch; adjust annually	Executive Sponsor
Which feedback themes to prioritize	Prioritization meeting participants (consensus)	Quarterly prioritization meeting using Impact/Effort Matrix	Prioritization Lead breaks tie; Executive Sponsor if still unresolved
What actions to take in response	Prioritization meeting participants, owner assigns	Meeting decision with documented rationale	Executive Sponsor
Who sees disaggregated data	Feedback System Owner + Equity Reviewer	Per Data Access Guidelines (Document 6)	Executive Sponsor
Whether to disclose sensitive findings to funders	Executive Sponsor, advised by Funder Liaison and Legal	Consult then decide; Document 9 of Funders Toolkit	Board chair if reputational risk
Whether to file a	Crisis Contact,	Immediate; consult legal if	Legal counsel

mandatory report	per legal obligations	uncertain. Document 6 of Crisis Toolkit	
Whether to expand to new sites	Executive Sponsor, informed by pilot data	Scale-Up Readiness Checklist (Pilot Toolkit, Document 10)	Board / Leadership Team
Budget allocation for feedback operations	Executive Sponsor, proposed by Feedback System Owner	Annual budget process	Leadership team
Whether to sunset a survey question	Feedback System Owner, with data rationale	Annual survey review; requires documented justification	Executive Sponsor
How to communicate results to staff	Feedback System Owner + Site Champions	Use Staff Buy-In Toolkit templates	Executive Sponsor

Decision-Making Principles

Five Rules for Feedback Governance Decisions

1. DATA FIRST: Every decision should reference actual feedback data, not anecdotes or assumptions.

2. DOCUMENTED: Every decision must be recorded with rationale, especially decisions NOT to act.

3. REVERSIBLE: Most feedback decisions are reversible. Bias toward action over deliberation.

4. TRANSPARENT: Staff and participants should understand how decisions are made, even if they don’t agree with every outcome.

5. ESCALATED RARELY: If decisions are constantly escalating to the Executive Sponsor, the roles below are insufficiently empowered.

Delegation Clarity Check

For each role, confirm their decision authority:

ROLE	CAN DECIDE ALONE	NEEDS APPROVAL FOR	MUST ESCALATE
Feedback System Owner	Survey timing, data review cadence, internal reporting format, kiosk	Budget increases, new site launches, funder disclosures	Crisis escalation, policy changes, board communications

	placement approval		
Data Analyst	Analytical methods, report formatting, trend identification	Publishing findings externally, equity interpretations	Red-flag responses, data access exceptions
Site Champion	Minor kiosk placement adjustments, signage changes at their site	Survey content changes, reporting changes	Staff complaints about the system, participant concerns about anonymity
Prioritization Lead	Meeting scheduling, agenda design, facilitation decisions	Which items become formal projects, budget allocation	Unresolved conflicts between teams
Executive Sponsor	Budget allocation, new sites, funder disclosures, policy approval	Board-level commitments, organizational restructuring	Legal obligations, regulatory issues

DOCUMENT 3

Feedback Lifecycle Map

From intake to action to reporting — the complete journey of a piece of participant feedback

📋 **INSTRUCTIONS:** *This map traces a single piece of feedback from the moment a participant touches the kiosk to the moment it appears in a funder report or drives an organizational change. Every handoff is a potential failure point. Map your actual process against this template and identify where gaps exist.*

The 8 Stages

STAGE	WHAT HAPPENS	WHO IS RESPONSIBLE	OUTPUTS	FAILURE MODE
1. COLLECTION	Participant completes survey on kiosk. Response is encrypted and transmitted to the data platform.	Site Champion (kiosk uptime); Technology vendor (platform)	Raw response data in secure platform	Kiosk is broken, unplugged, or inaccessible. Staff discourage use.
2. INGESTION	Responses are aggregated in the data platform. Automated alerts flag potential red flags.	Technology vendor (automated); Data Analyst (verification)	Aggregated dataset; red-flag alerts	Alerts misconfigured. Data not flowing. No one checking.
3. TRIAGE	Red-flag responses are classified (Level 1/2/3) and routed per crisis protocol. Non-crisis items enter standard queue.	Crisis Contact (red flags); Data Analyst (standard)	Triaged responses; crisis actions initiated if needed	Red flags missed. No one reviewing for safety content.
4. ANALYSIS	Data Analyst prepares summary: scores, trends, themes, open-ended review, equity disaggregation.	Data Analyst; Equity Reviewer	Feedback summary report; equity analysis	Analysis delayed. Report never created. Equity lens skipped.
5. PRIORITIZATION	Team reviews summary, scores items, assigns action lanes (Act Now / Plan Later / Monitor).	Prioritization Lead; meeting participants	Prioritized action list with owners and deadlines	Meeting doesn’t happen. No one facilitates. Items stay in limbo.

6. ACTION	Assigned owners implement changes. Progress tracked on accountability worksheet.	Action item owners; tracked by Prioritization Lead	Completed improvements; documented changes	Owners don’t follow through. No one tracks. Actions stall.
7. COMMUNICATION	Results and actions shared with staff and participants. “What We Heard” posted. Success stories documented.	Feedback System Owner; Site Champions	Staff emails; participant posters; success stories	Loop never closed. Staff and participants don’t know what happened.
8. REPORTING	Feedback data integrated into funder reports, board presentations, and annual summaries.	Funder Liaison; Executive Sponsor	Grant reports; board decks; annual summary	Data collected but never reported. Funders don’t see the value.

Lifecycle Health Assessment

Rate each stage on a 1–5 scale (1 = not functioning, 5 = running smoothly):

STAGE	CURRENT RATING (1–5)	BIGGEST GAP	FIX NEEDED	OWNER
1. Collection				
2. Ingestion				
3. Triage				
4. Analysis				
5. Prioritization				
6. Action				
7. Communication				
8. Reporting				

Handoff Checklist

At every stage transition, verify:

☐	The person receiving the handoff knows they are receiving it (not assumed)

☐	The output of the previous stage is in a format the next stage can use
☐	There is a defined timeline for the next stage to begin
☐	There is a mechanism to flag if the next stage doesn’t start on time
☐	The handoff is documented (not verbal-only)

DOCUMENT 4

Meeting Cadence & Agenda Templates

Recurring meetings that keep the feedback system alive — because systems without meetings become systems without action

📋 **INSTRUCTIONS:** *Schedule all of these meetings at the start of the year. Put them on organizational calendars with automated reminders. A feedback system that depends on someone remembering to schedule meetings will eventually have no meetings.*

Meeting Calendar Overview

MEETING	FREQUENCY	DURATION	ATTENDEES	PURPOSE
Data Review	Monthly (first year); Quarterly (subsequent)	30 min	Data Analyst + Feedback System Owner	Review latest data, flag trends, identify red flags
Prioritization Meeting	Quarterly	60–90 min	Feedback System Owner, Site Champions, Equity Reviewer, Program Leads	Score, prioritize, assign, and document all feedback themes
Accountability Check-In	Monthly	15 min	Feedback System Owner + Action Item Owners (can be async)	Review status of all open action items
Leadership Briefing	Quarterly	20 min	Executive Sponsor + Feedback System Owner	Present findings, seek decisions, secure resources
Staff Results Share	Quarterly (after Prioritization Meeting)	15 min	Site Champion + all site staff	Share results and actions with frontline team
Annual Governance Review	Annually	90 min	All governance roles	Audit roles, processes, effectiveness; plan for next year

Agenda: Monthly Data Review (30 min)

TIME	TOPIC	NOTES

0:00–5:00	Response volume check	Total responses, trend vs. prior period, any sites with drops
5:00–15:00	Score review	Overall and by domain. Note any significant changes (≥0.5 points).
15:00–20:00	Open-ended scan	Top 3 themes from qualitative data. Any new or surprising themes?
20:00–25:00	Red flag / triage check	Any Level 1/2/3 flags since last review? Status of any open incidents.
25:00–30:00	Equity quick scan	Any visible disparities? Any groups below reporting thresholds?

Agenda: Quarterly Prioritization Meeting (60–90 min)

Full agenda is in the Feedback Prioritization Toolkit, Document 8. Key segments:

TIME	SEGMENT
0:00–5:00	Ground rules and anti-bias checklist read-aloud
5:00–15:00	Safety triage of any outstanding items
15:00–30:00	Impact/effort scoring with independent scoring
30:00–40:00	Equity lens application
40:00–50:00	Resource constraint reality check
50:00–65:00	Decision tree routing and owner assignment
65:00–80:00	Documentation of all decisions (including “no action” items)
80:00–90:00	Communication planning and next meeting scheduling

Agenda: Quarterly Leadership Briefing (20 min)

TIME	TOPIC	NOTES
0:00–3:00	Headline finding	Lead with the single most important insight. Make it memorable.
3:00–8:00	Key metrics summary	Response volume, satisfaction trend, top/bottom domains. Use 1 chart.
8:00–12:00	Actions taken and outcomes	“What Changed Because of Feedback” highlights. 2–3 examples max.
12:00–16:00	Equity and risk update	Any equity gaps identified, any sensitive findings, any mandatory reports.
16:00–20:00	Decisions needed from leadership	Budget requests, site expansion, policy changes. Be specific.

Agenda: Annual Governance Review (90 min)

Use the Annual Governance Review Checklist (Document 10) as the agenda for this meeting.

DOCUMENT 5

Accountability Tracking Worksheet

Making sure commitments made in prioritization meetings become completions

📋 **INSTRUCTIONS:** *Every action item assigned in a prioritization meeting or data review must be tracked here. The Feedback System Owner reviews this worksheet monthly and reports status at each Accountability Check-In. An action item without a tracker is an action item that won't get done.*

Active Action Items

ID	ACTION ITEM	SOURCE	OWNER	DEADLINE	STATUS	LAST UPDATE
FB-001		Q_ prioritization mtg			Not Started / In Progress / Complete / Stalled	
FB-002						
FB-003						
FB-004						
FB-005						
FB-006						
FB-007						
FB-008						
FB-009						
FB-010						

Escalation Rules

STATUS	TRIGGER	ACTION

🟢 On Track	Deadline is in the future; progress is being made	No action needed. Report green at check-in.
🟡 At Risk	Deadline is within 2 weeks and item is not 75%+ complete	Owner must provide a revised plan at the next check-in.
🔴 Overdue	Deadline has passed without completion	Feedback System Owner escalates to Executive Sponsor.
● Stalled	No progress for 30+ days regardless of deadline	Root cause investigation. Reassign, rescope, or formally close with rationale.

Completed Items Archive

ID	ACTION ITEM	COMPLETED DATE	OUTCOME / RESULT	DOCUMENTED IN
				Doc 6 of Prioritization Toolkit

Quarterly Summary

METRIC	THIS QUARTER
Total action items assigned	
Items completed on time	
Items completed late	
Items still in progress	
Items stalled or escalated	
Completion rate (%)	

DOCUMENT 6

Data Access & Permission Guidelines

Who can see what data, at what level of granularity, and under what conditions

📋 **INSTRUCTIONS:** *Not everyone who works with the feedback system needs to see everything. Data access should follow the principle of minimum necessary access: each role sees only the data required to perform their function. These guidelines protect participant anonymity, prevent misuse, and maintain staff trust.*

Access Tiers

TIER	DATA VISIBLE	WHO GETS THIS ACCESS	JUSTIFICATION
Tier 1: Full Access	All responses including individual open-ended text, raw scores, timestamps, demographic breakdowns	Data Analyst; Feedback System Owner	Required for analysis, triage, and system management
Tier 2: Aggregate + Themes	Summary scores, trend charts, aggregated theme lists, anonymized representative quotes (no raw text)	Program Directors, Site Champions, Prioritization Lead, Equity Reviewer	Required for prioritization and action planning
Tier 3: Summary Only	High-level scores, trend arrows, action summaries, curated quotes (per Document 3 of Funders Toolkit)	Executive Sponsor, Funder Liaison, Board Members	Required for strategic decisions and external reporting
Tier 4: Outcomes Only	Actions taken and results achieved. No underlying data.	Frontline Staff, Participants (via "What We Heard")	Closes the loop without exposing individual responses

Access Assignment Worksheet

PERSON / ROLE	TIER ASSIGNED	PLATFORM ACCESS? (Y/N)	ACCESS GRANTED BY	DATE
	Tier 1 / 2 / 3 / 4			

Access Rules

☐	Every person with Tier 1 or Tier 2 access has completed feedback data training (including anonymity protocols, crisis triage, and anti-bias awareness)
☐	Access is reviewed annually as part of the Annual Governance Review (Document 10)
☐	Access is revoked within 48 hours when a person leaves their role or the organization
☐	No one receives Tier 1 access unless there is a documented operational need
☐	Tier 3 recipients never receive raw open-ended text — only curated, anonymized quotes
☐	All data exports are logged with the requestor’s name and purpose
☐	Shared dashboards display only the tier-appropriate data for their intended audience
☐	Physical printouts of Tier 1 or Tier 2 data are shredded after use — never left on desks or in common areas

Prohibited Actions

⚠ Regardless of Access Tier, No One May:

✘ Attempt to identify an anonymous respondent from their feedback content, timing, or demographic data

✘ Share raw open-ended text with anyone who does not have Tier 1 access

✘ Use feedback data in any staff performance evaluation, disciplinary action, or hiring decision

✘ Share feedback data on personal devices, personal email, or messaging apps

✘ Provide data to external parties (media, researchers, other organizations) without Executive Sponsor approval

✘ Retain copies of feedback data after leaving their role or the organization

DOCUMENT 7

Feedback Policy Starter Template

A formal organizational policy for participant feedback operations — customize and adopt

📋 **INSTRUCTIONS:** *This template provides the structure for a formal organizational policy governing your anonymous participant feedback system. Customize the bracketed fields, have it reviewed by legal counsel, and present it for adoption by your leadership team or board. A written policy transforms the feedback system from a program initiative into organizational infrastructure.*

Policy Header

FIELD	YOUR CONTENT
Policy Title	Anonymous Participant Feedback System Policy
Effective Date	
Approved By	[Board / Executive Director / Leadership Team]
Policy Owner	[Feedback System Owner name and title]
Review Cycle	Annually (next review due: ____________)
Applies To	All staff, contractors, and volunteers at [Organization Name]

Section 1: Purpose

Template Language

[Organization Name] is committed to continuously improving the services we provide to participants. To support this commitment, we operate an anonymous participant feedback system that collects, analyzes, and acts on the honest experiences of the people we serve.

This policy establishes the governance structure, roles, ethical standards, and operational procedures for the feedback system, ensuring it operates with integrity, protects participant anonymity, and drives meaningful organizational improvement.

Section 2: Scope

This policy applies to all activities related to the collection, storage, analysis, reporting, and use of anonymous participant feedback at [Organization Name], including but not limited to: survey design, kiosk operations, data analysis, prioritization, action implementation, staff communication, participant communication, funder reporting, and crisis response.

Section 3: Core Principles

PRINCIPLE	POLICY STATEMENT
Anonymity	Participant feedback is collected anonymously. No names, logins, or identifying information are collected. All reports present data in aggregate form only. Data suppression rules are applied to protect anonymity in small subgroups.
Voluntary participation	Completing the feedback survey is entirely voluntary. No participant shall be required, pressured, or incentivized to provide feedback. Staff shall not monitor who does or does not use the kiosk.
Non-punitive use	Feedback data shall never be used in any staff performance evaluation, disciplinary action, or employment decision. This protection applies to all staff at all levels.
Transparency	Results of feedback analysis shall be shared with staff and participants on a regular basis. Participants shall be informed of actions taken in response to their feedback.
Equity	Feedback data shall be disaggregated and analyzed for equity when sample sizes permit. Equity-weighted prioritization shall be applied to ensure historically marginalized populations receive proportionate attention.
Accountability	Every feedback theme reviewed shall be documented with a decision and rationale, whether or not action is taken. Actions assigned shall be tracked to completion.
Safety	Feedback responses indicating imminent danger, abuse, or self-harm shall be triaged and escalated immediately per the Crisis & High-Risk Feedback Response Toolkit.

Section 4: Roles and Responsibilities

[Insert your completed Role Definition Matrix from Document 1 of this toolkit.]

Section 5: Data Access and Security

[Insert your completed Data Access & Permission Guidelines from Document 6 of this toolkit.]

Section 6: Meeting Cadence

[Insert your meeting schedule from Document 4 of this toolkit.]

Section 7: Crisis Response

All red-flag feedback shall be handled per the organization’s Crisis & High-Risk Feedback Response Toolkit, including classification, escalation, mandatory reporting, and documentation protocols.

Section 8: Policy Violations

Violations of this policy — including attempts to identify anonymous respondents, punitive use of feedback data, or failure to escalate red-flag responses — shall be addressed through the organization’s standard disciplinary process and may result in corrective action up to and including termination.

Adoption Signatures

Approved by: ______________________________ Title: ____________ Date: ____________

Policy Owner: ______________________________ Title: ____________ Date: ____________

DOCUMENT 8

Governance Health Self-Assessment

Rating your feedback governance maturity across 10 dimensions

📋 **INSTRUCTIONS:** *Complete this self-assessment annually as part of your Annual Governance Review (Document 10), or whenever you suspect the system is drifting. Be honest — this is a diagnostic tool, not a performance review. Low scores indicate where to invest, not where to assign blame.*

Rating Scale

SCORE	MEANING
1 — Not in Place	This function does not exist or has completely lapsed.
2 — Informal	Someone occasionally does this, but there's no formal process or assigned owner.
3 — Developing	A process exists but is inconsistent, undocumented, or dependent on a single person.
4 — Operational	A documented process exists, is followed consistently, and has a named owner.
5 — Mature	The process is documented, consistently followed, regularly reviewed, and has a backup owner.

Assessment

#	DIMENSION	WHAT "5" LOOKS LIKE	SCORE (1–5)	NOTES / GAPS
1	Ownership Clarity	Every function in the lifecycle has a named owner and backup. The role matrix is current.		
2	Decision Rights	Everyone knows who decides what. Decisions are made on time and documented.		
3	Data Flow	Data moves from collection to analysis to action without bottlenecks or black holes.		
4	Meeting Discipline	All scheduled meetings happen on time, follow agendas, and produce documented outcomes.		

5	Accountability	Action items are tracked, followed up on, and completed at ≥75% rate.		
6	Data Security	Access tiers are defined, enforced, and reviewed. No unauthorized access occurs.		
7	Equity Integration	Equity analysis is performed routinely. Equity reviewer is active and empowered.		
8	Communication Loops	Staff and participants regularly receive updates on what feedback revealed and what changed.		
9	Crisis Readiness	Red-flag protocol is documented, contact list is current, and at least one drill has been conducted.		
10	Leadership Engagement	Executive Sponsor actively uses feedback data, asks for briefings, and champions the system.		

Scoring Guide

TOTAL SCORE	GOVERNANCE MATURITY LEVEL	RECOMMENDED ACTION
40–50	Mature Governance	Maintain current practices. Focus on continuous improvement and knowledge transfer.
30–39	Operational Governance	Strong foundation. Address 1–2 weak dimensions per quarter.
20–29	Developing Governance	Significant gaps. Prioritize ownership clarity, meeting discipline, and accountability.
10–19	Fragile Governance	System depends on individuals, not structure. Invest in documentation and role assignment.
<10	Governance Absent	The system is at serious risk of failure. Begin with Document 1 (roles) and Document 7 (policy).

Action Plan

LOWEST-SCORING DIMENSION	CURRENT SCORE	TARGET SCORE	SPECIFIC ACTION TO IMPROVE	OWNER	DEADLINE

DOCUMENT 9

Leadership Reporting Structure Template

How feedback data flows to decision-makers — ensuring leaders get the right information at the right time

📋 **INSTRUCTIONS:** *This document defines what feedback information reaches leadership, in what format, how often, and through what channels. The goal is to keep leadership informed enough to make good decisions without overwhelming them with operational detail. Leaders who are disconnected from feedback data will eventually deprioritize the system.*

Reporting Flow

AUDIENCE	RECEIVES	FORMAT	FREQUENCY	DELIVERED BY
Executive Director / CEO	Quarterly briefing: headline findings, key metrics, equity updates, decisions needed, risk disclosures	20-min verbal briefing + 1-page summary	Quarterly	Feedback System Owner
Board of Directors	Annual feedback summary: year-at-a-glance metrics, actions taken, equity progress, system health	Written report (use Annual Summary Template, Funders Toolkit Doc 8) + 10-min board presentation	Annually	Executive Sponsor
Program Directors	Full quarterly data review: scores by domain, trends, open-ended themes, site-level comparisons	Written summary report + discussion at prioritization meeting	Quarterly	Data Analyst
Site Supervisors	Site-specific data snapshot: their site's scores, trends, and action items	1-page site summary + verbal review	Quarterly	Feedback System Owner / Data Analyst
Funders	Grant-specific feedback narrative with outcomes, actions, and appendices	Written section in grant reports (use Funders Toolkit)	Per grant schedule	Funder Liaison

One-Page Leadership Summary Template

Use this structure for the quarterly summary delivered to the Executive Director:

SECTION	CONTENT	SPACE ALLOCATION
Headline Finding	Single most important insight, in one sentence.	1–2 lines
Key Metrics	Response volume, overall satisfaction, top/bottom domain, trend arrows.	Small table or dashboard graphic
Top Actions Taken	2–3 bullet points: what changed because of feedback this quarter.	3–4 lines
Equity Update	Any gaps detected, any gaps narrowing, any groups below threshold.	2–3 lines
Risk / Sensitive Items	Any red-flag incidents, mandatory reports, or findings requiring disclosure.	2–3 lines (or “None this quarter”)
Decisions Needed	Specific asks: budget, site expansion, policy change, funder communication.	2–3 numbered items

Escalation Triggers for Off-Cycle Reporting

These situations require leadership notification BETWEEN scheduled briefings:

TRIGGER	NOTIFY	TIMELINE
Level 1 red-flag response (imminent danger)	Executive Director	Immediately (per Crisis Toolkit)
Mandatory report filed	Executive Director	Same business day
Satisfaction score drops ≥15% in a single quarter	Executive Director + Program Director	Within 1 week of detection
Media inquiry about feedback data	Executive Director + Communications	Immediately
Staff misconduct allegation in feedback	Executive Director + HR Director	Same business day
Funder requests unplanned data	Executive Director + Funder Liaison	Within 48 hours

DOCUMENT 10

Annual Governance Review Checklist

A comprehensive yearly audit of roles, processes, policies, and effectiveness

📋 **INSTRUCTIONS:** *Schedule this review annually (recommend Q4). Duration: 90 minutes. Attendees: all governance role holders. Use this checklist as the meeting agenda. The review ensures that the feedback system's governance infrastructure is still functioning, identifies drift, and plans improvements for the coming year.*

Section 1: Role & Ownership Review

☐	The Role Definition Matrix (Document 1) is current: all functions have named owners
☐	No critical function has a single point of failure (backup is identified and trained)
☐	All role holders are still in their positions (no vacant governance roles)
☐	Any role changes during the year have been documented and transitioned properly
☐	New hires who interact with the feedback system have received appropriate training

Section 2: Decision Rights Review

☐	The Decision Rights Framework (Document 2) reflects current practice
☐	Decisions are being made at the appropriate level (not over-escalated or under-escalated)
☐	Decision rationale is being documented consistently (check Document 7 of Prioritization Toolkit)
☐	No recurring decisions are stuck in ambiguity about who decides

Section 3: Lifecycle Health

☐	All 8 lifecycle stages (Document 3) are functioning; no stages have lapsed
☐	Data flows from collection to action without bottlenecks exceeding 2 weeks
☐	Red-flag triage is happening at every data review (not being skipped)
☐	The feedback-to-action loop is closing: participants and staff see results of their feedback

Section 4: Meeting Discipline

☐	All scheduled meetings (Document 4) occurred on time this year

☐	Meeting agendas are used consistently
☐	Meeting outputs are documented and distributed
☐	Leadership briefings occurred quarterly with documented decisions
☐	If any meetings were missed, the reason is documented and a make-up occurred

Section 5: Accountability

☐	The Accountability Tracking Worksheet (Document 5) is actively maintained
☐	Quarterly completion rate is ≥75%
☐	Stalled items are escalated per the escalation rules
☐	Completed actions are documented with outcomes

Section 6: Data Access & Security

☐	The Data Access worksheet (Document 6) is current: all access assignments are accurate
☐	Access has been revoked for any person who left their role during the year
☐	No unauthorized data access incidents occurred (or all were documented and addressed)
☐	Suppression rules are being applied consistently in all reports
☐	No attempts to identify anonymous respondents have been reported

Section 7: Policy

☐	The Feedback Policy (Document 7) is adopted and current
☐	All staff have been informed of the policy (onboarding or annual reminder)
☐	No policy violations occurred this year (or all were documented and addressed)
☐	The policy is due for review and update based on lessons learned

Section 8: Crisis Readiness

☐	The Crisis & High-Risk Toolkit contact list is current (all phone numbers tested)
☐	At least one red-flag classification training or refresher occurred this year
☐	All red-flag incidents that occurred were handled per protocol and reviewed post-incident
☐	Mandatory reporting procedures are clear and understood by all Tier 1 data access holders

Section 9: Equity

☐	Equity analysis was performed at least quarterly
☐	An Equity Reviewer is assigned and active
☐	Identified equity gaps are being tracked across quarters (Equity Toolkit, Document 10)
☐	Equity-weighted prioritization was applied at every prioritization meeting

Section 10: System Health Summary

Complete the Governance Health Self-Assessment (Document 8) as part of this review. Record results:

DIMENSION	LAST YEAR'S SCORE	THIS YEAR'S SCORE	CHANGE	ACTION NEEDED?
1. Ownership Clarity				☐
2. Decision Rights				☐
3. Data Flow				☐
4. Meeting Discipline				☐
5. Accountability				☐
6. Data Security				☐
7. Equity Integration				☐
8. Communication Loops				☐
9. Crisis Readiness				☐
10. Leadership Engagement				☐
TOTAL				

Annual Review Action Items

FINDING	ACTION NEEDED	OWNER	DEADLINE

Sign-Off

Annual review completed by: ______________________________ Date: ____________

Executive Sponsor acknowledgment: ______________________________ Date: ____________

Next annual review scheduled for: ______________________________

End of Toolkit

For implementation support, contact your Pulse For Good account manager or visit pulseforgood.com