

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

Equity Gap

Detection Toolkit

A structured system for identifying, analyzing, and ethically responding to disparities in participant experience. This toolkit contains 10 ready-to-use documents covering data disaggregation, small-sample safeguards, intersectionality analysis, bias prevention, leadership briefing, and equity-focused follow-up — so your feedback data reveals inequities rather than hiding them.

10 Equity Analysis Documents

Worksheets • Checklists • Templates • Reflection Guides

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Toolkit Contents

This toolkit provides a responsible, structured approach to detecting and responding to equity gaps in participant feedback data. Each document addresses a different dimension of equity-aware analysis.

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DOCUMENT 1

Disaggregation Planning Worksheet

Deciding what to break out, why, and how to do it responsibly

 **INSTRUCTIONS:** Complete this worksheet *BEFORE* designing your survey or analyzing existing data. Disaggregation is the practice of breaking data into subgroups to reveal disparities hidden by aggregate averages. But disaggregation done carelessly can violate anonymity, reinforce stereotypes, or create data too thin to interpret. This worksheet helps you disaggregate with purpose and care.

Core Principle

Disaggregate with Purpose, Not by Default

Every demographic question you add to a survey increases participant burden and creates an anonymity risk. Only collect demographic data if you have a specific, actionable reason to disaggregate by that variable. Ask: “If I find a disparity by this variable, can and will I do something about it?” If the answer is no, don’t collect it.

Step 1: Identify Potential Disaggregation Variables

For each variable below, decide whether to include it in your survey. Consider both the analytical value and the anonymity risk.

VARIABLE	WHY YOU MIGHT DISAGGREGATE	ANONYMITY RISK LEVEL	INCLUDE?
Gender identity	Detect disparities in safety, respect, or access by gender	Medium — small groups may be identifiable	Y / N
Race / Ethnicity	Detect racial disparities in service quality or treatment	Medium to High — depends on population diversity	Y / N
Age range	Different needs across age groups; youth vs. adults vs. elderly	Low — broad ranges protect identity	Y / N
Primary language	Detect whether non-English speakers have equitable experience	Medium — rare languages may identify individuals	Y / N
Length of stay /	New participants vs. long-term;	Low — broad	Y / N

Service duration	experience may differ	categories are safe	
Program / Service type	Different programs may have different quality levels	Low to Medium — depends on program size	Y / N
Site / Location	Multi-site organizations may have site-level disparities	Low — sites typically have many participants	Y / N
Disability status	Detect accessibility and accommodation gaps	High — small populations, high sensitivity	Y / N
Sexual orientation	Detect safety and respect disparities for LGBTQ+ participants	High — small populations, high sensitivity	Y / N
Household composition	Families vs. individuals may have different needs	Medium — depends on population	Y / N

Step 2: Set Minimum Sample Size Thresholds

Before collecting data, decide the minimum number of responses required before you'll report on a subgroup. This prevents drawing conclusions from too-thin data and protects anonymity.

REPORTING CONTEXT	RECOMMENDED MINIMUM	YOUR THRESHOLD
Internal analysis (seen only by data team)	10 responses per subgroup	
Leadership briefing	15 responses per subgroup	
Staff-facing reports	20 responses per subgroup	
Public or funder-facing reports	25 responses per subgroup	
Any report involving high-sensitivity variables (disability, orientation)	30 responses per subgroup	

Step 3: Design Demographic Questions

For each variable you chose to include, design the survey question using these principles:

<input type="checkbox"/>	Categories are broad enough to protect anonymity (e.g., age ranges of 10+ years, not single years)
<input type="checkbox"/>	Every question includes a “Prefer not to answer” option that is never penalized

<input type="checkbox"/>	Questions explain WHY the information is being collected (“We ask this to make sure everyone has an equal experience”)
<input type="checkbox"/>	Wording is respectful and follows current best practices for each identity category
<input type="checkbox"/>	Number of categories per question is ≤ 6 to reduce cognitive load
<input type="checkbox"/>	Demographic questions appear at the END of the survey (not the beginning — reduces identity threat)
<input type="checkbox"/>	Order of demographic questions goes from least to most sensitive

DOCUMENT 2

Equity Signal Identification Checklist

Recognizing patterns in feedback data that indicate disparate experience across groups

 **INSTRUCTIONS:** Use this checklist every time you review disaggregated feedback data. Equity signals are patterns that suggest one group is having a meaningfully different experience than another. Not every difference is an equity issue — this checklist helps you distinguish signal from noise.

Quantitative Equity Signals

Look for these patterns when comparing scores across subgroups:

SIGNAL	WHAT TO LOOK FOR	THRESHOLD FOR CONCERN	DETECTED?
Satisfaction gap	One subgroup's average satisfaction score is consistently lower than the overall average	≥ 0.5 points on a 5-point scale OR ≥ 10 percentage points	<input type="checkbox"/>
Response rate disparity	One subgroup responds at significantly lower rates than their share of the population	Response rate $\leq 50\%$ of their population proportion	<input type="checkbox"/>
Negative trend divergence	One subgroup's scores are trending downward while others are stable or improving	2+ consecutive quarters of decline vs. stability	<input type="checkbox"/>
Safety score gap	Any subgroup reports feeling unsafe at meaningfully higher rates	Any difference on safety items warrants investigation	<input type="checkbox"/>
Completion rate gap	One subgroup starts but doesn't finish surveys at higher rates	$\geq 15\%$ difference in completion rates	<input type="checkbox"/>
Skip rate on sensitive items	One subgroup skips specific questions at much higher rates	$\geq 2x$ the overall skip rate for that question	<input type="checkbox"/>

Qualitative Equity Signals

Look for these patterns in open-ended / verbatim feedback:

<input type="checkbox"/>	A specific subgroup's open-ended responses mention discrimination, bias, or unfair
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	treatment
<input type="checkbox"/>	Language about feeling “invisible,” “unheard,” or “disrespected” appears disproportionately in one group
<input type="checkbox"/>	One subgroup raises issues no other group mentions (e.g., dietary needs, accessibility, cultural practices)
<input type="checkbox"/>	Feedback from one group uses more negative emotional language than the overall norm
<input type="checkbox"/>	Specific staff behaviors (rudeness, dismissiveness) are mentioned more by one subgroup
<input type="checkbox"/>	One subgroup’s feedback consistently references systemic barriers (transportation, language, documentation status)
<input type="checkbox"/>	Feedback from a subgroup mentions fear of retaliation or distrust of the system at higher rates

Contextual Equity Signals

These require looking beyond the feedback data itself:

<input type="checkbox"/>	A known vulnerable population in your community is underrepresented in your response data
<input type="checkbox"/>	Staff anecdotally report challenges serving a specific population, corroborating feedback patterns
<input type="checkbox"/>	External data (community assessments, census data) shows disparities your feedback data may reflect
<input type="checkbox"/>	A policy change, staff turnover, or service modification coincides with a subgroup’s score decline
<input type="checkbox"/>	Participants from one subgroup are leaving the program at higher rates (attrition as a signal)

Signal Documentation Log

SIGNAL DETECTED	SUBGROUP AFFECTED	DATA SOURCE	MAGNITUDE	FIRST APPEARED	ACTION

DOCUMENT 3

Small-Sample Interpretation Guardrails

Preventing over-interpretation and under-interpretation of data from small subgroups

INSTRUCTIONS: *Small samples are inevitable in equity analysis — marginalized populations are often numerically small. This creates a paradox: the groups most at risk of inequitable treatment are the same groups whose data is thinnest. These guardrails help you take small-sample data seriously without over-interpreting it.*

The Two Errors

OVER-INTERPRETATION (Type I)	UNDER-INTERPRETATION (Type II)
Treating a small-sample finding as definitive proof of a systemic problem	Dismissing a small-sample finding because “the numbers are too small to matter”
Making sweeping policy changes based on 5 responses	Ignoring a safety concern because only 3 people reported it
Publishing subgroup data that could identify individuals	Waiting for “statistically significant” data while people experience real harm

Interpretation Framework by Sample Size

SAMPLE SIZE	CONFIDENCE LEVEL	WHAT YOU CAN SAY	WHAT YOU CAN'T SAY
1-4 responses	Anecdotal only	“A small number of participants from [group] reported [X]. We are monitoring for patterns.”	Don't generalize. Don't report percentages. Don't identify the subgroup publicly.
5-9 responses	Emerging signal	“Early data from [group] suggests a possible concern around [X]. Further data collection is underway.”	Don't treat as confirmed. Don't report exact percentages. Use language like “several” or “a notable number.”
10-19 responses	Preliminary finding	“Data from [N] participants in [group] indicates a potential disparity in [X]. We are investigating.”	Can report rough proportions (“about half,” “most”). Don't present as conclusive.
20-29 responses	Substantive finding	“Feedback from [N] participants in [group] shows a meaningful difference in [X] compared to the overall population.”	Can report percentages. Appropriate for leadership briefings. Still note sample size.

30+ responses	Reliable finding	“Data from [N] participants consistently shows [X]. This is a confirmed equity gap requiring action.”	Can report confidently. Appropriate for all audiences. Standard analytical methods apply.
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Guardrail Rules

⚠ Never Do These with Small Samples

- ✘ Never calculate or report percentages from fewer than 10 responses (“100% of our 2 transgender participants...” is misleading and potentially identifying).
- ✘ Never publish subgroup data if the subgroup has fewer than 5 respondents (see Document 4 for suppression rules).
- ✘ Never dismiss a safety concern because the sample is small. Even a single report of harm warrants investigation.
- ✘ Never average a small subgroup’s scores into the overall average and then declare “no disparity found.” The averaging itself hides the disparity.
- ✘ Never tell staff or leadership the exact number of respondents in a very small subgroup (“2 people who identified as...”), as this enables re-identification.

What TO Do with Small Samples

<input type="checkbox"/>	Track the data over time. Small samples become meaningful patterns when accumulated across quarters.
<input type="checkbox"/>	Combine related subgroups when safe to do so (e.g., all non-English speakers rather than by individual language).
<input type="checkbox"/>	Supplement with qualitative data: even a few open-ended responses can provide rich context.
<input type="checkbox"/>	Use the finding to design targeted outreach. Low response rates from a group may be the first equity signal.
<input type="checkbox"/>	Report to leadership using appropriate hedging language (see framework above).
<input type="checkbox"/>	Set a follow-up data collection goal: “We need at least [N] more responses from [group] before we can confirm this trend.”

DOCUMENT 4

Data Suppression Guidance

When and how to suppress data to protect participant anonymity during equity analysis

 **INSTRUCTIONS:** *Data suppression means intentionally withholding or masking data points that could allow someone to identify an individual respondent. This is essential when working with small subgroups. The more sensitive the variable, the stricter the suppression rules must be. Follow these rules for ALL reports — internal and external.*

Suppression Rules by Report Type

REPORT TYPE	MINIMUM N FOR REPORTING	SUPPRESSION METHOD	NOTATION
Internal data analysis (analyst eyes only)	5	Mask exact counts. Use ranges (“<10”).	Show as “*” with footnote
Leadership briefing	10	Suppress cell. Report combined categories if possible.	Show as “Suppressed — small N”
Staff-facing reports	15	Suppress cell. Do not show the category at all if N<15.	Omit category or show “—”
Public / funder reports	20	Suppress cell. Combine categories or omit variable entirely.	Show as “Data suppressed to protect anonymity”
Any report with high-sensitivity variables	25-30	Suppress cell. Consider not collecting the variable at all if N will always be small.	Show as “Insufficient data for reliable reporting”

Complementary Suppression

When you suppress one cell in a table, a reader can sometimes calculate the suppressed value by subtracting the other values from the total. This is called “complementary disclosure.” To prevent it:

<input type="checkbox"/>	If you suppress one category in a set, also suppress the next-smallest category so the suppressed value cannot be reverse-calculated
<input type="checkbox"/>	If a table has only 2 subgroup rows plus a total, suppress both subgroups (not just one) if either falls below the minimum
<input type="checkbox"/>	When combining suppressed categories, ensure the combined group has enough respondents to meet the threshold

<input type="checkbox"/>	Consider suppressing the total row if the total minus visible categories would reveal the suppressed value
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Suppression Decision Flowchart

For each cell in a disaggregated data table, ask:

Step-by-Step Suppression Check

1. Is the subgroup N below the minimum threshold for this report type? → If YES: Suppress.
2. Even if N meets the threshold, could the combination of variables identify someone? (e.g., the only Spanish-speaking male over 60) → If YES: Suppress.
3. If this cell is suppressed, can a reader calculate its value from other visible cells? → If YES: Apply complementary suppression.
4. Does the remaining visible data still tell a meaningful story? → If NO: Consider combining categories or removing the variable from this report entirely.
5. Document every suppression decision in the log below.

Suppression Decision Log

REPORT	VARIABLE	SUBGROUP	N	SUPPRESSED?	METHOD	REASON
				Y / N		
				Y / N		
				Y / N		
				Y / N		
				Y / N		

Key Principle

⚠ Anonymity Always Wins

If there is ANY tension between reporting a finding and protecting anonymity, anonymity wins. Period.

You can always collect more data next quarter. You cannot undo a breach of someone's anonymity.

The populations most at risk of being identified in disaggregated data are the same populations most vulnerable to retaliation. The stakes are highest where the data is thinnest.

DOCUMENT 5

Comparative Analysis Worksheet

A structured framework for identifying and documenting disparities across groups

 **INSTRUCTIONS:** Use this worksheet after you've applied the disaggregation plan (Document 1), confirmed sample sizes meet thresholds (Document 3), and applied suppression rules (Document 4). This is where you systematically compare subgroup experiences side by side.

Analysis Setup

FIELD	YOUR DETAILS
Survey period	
Total responses	
Comparison variable	[e.g., Race/Ethnicity, Gender, Language, Site]
Subgroups being compared	[List all groups with N meeting threshold]
Questions/domains being compared	[e.g., Overall satisfaction, Safety, Staff respect]

Subgroup Comparison Table

Fill in scores for each subgroup across each survey domain. Highlight any cell where a subgroup's score is ≥ 0.5 points (on a 5-point scale) or ≥ 10 percentage points below the overall average.

SURVEY DOMAIN	OVERALL AVG	GROUP A (N=__)	GROUP B (N=__)	GROUP C (N=__)	GAP (LARGEST)
Overall satisfaction					
Safety					
Staff respect					
Cleanliness					
Communication					
Programs/ services					
Privacy					

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Disparity Assessment

For each gap identified above, complete this assessment:

DOMAIN WITH GAP	WHICH GROUP(S) AFFECTED?	GAP SIZE	PERSISTENT ? (SEEN BEFORE?)	POSSIBLE EXPLANATION(S)	SEVERITY
			Y / N		High / Med / Low
			Y / N		High / Med / Low
			Y / N		High / Med / Low
			Y / N		High / Med / Low

Open-Ended Response Comparison

Compare themes from open-ended responses across subgroups:

THEME	MENTIONED BY WHICH GROUPS?	FREQUENCY DIFFERENCE?	UNIQUE TO ONE GROUP?
			Y / N
			Y / N
			Y / N
			Y / N
			Y / N

Summary of Key Findings

FINDING	AFFECTED GROUP(S)	CONFIDENCE LEVEL (DOC 3)	RECOMMENDED ACTION LANE
		Anecdotal / Emerging / Preliminary / Substantive / Reliable	Act Now / Plan / Monitor

DOCUMENT 6

Intersectionality Reflection Prompts

Exploring how overlapping identities compound inequity in participant experience

 **INSTRUCTIONS:** *Intersectionality means that people hold multiple identities simultaneously, and the intersection of those identities can produce unique experiences that single-variable analysis misses. A Black woman's experience may differ from both the average Black participant's experience and the average woman's experience. These prompts help your team think intersectionally during equity analysis. Use them in your prioritization meeting or as a standalone reflection exercise.*

Core Concept

Why Single-Variable Analysis Is Not Enough

If your data shows no gender gap and no racial gap, it does NOT mean there is no equity gap.

Example: Overall satisfaction may be equal between men and women, and equal between White and Black participants. But Black women specifically may have significantly lower satisfaction — a gap invisible in single-variable analysis.

Intersectionality doesn't require larger samples or complex statistics. It requires asking the right questions.

Reflection Prompts

PROMPT 1: Whose experience is hiding inside the average?

When we look at overall scores, which subgroups might be masked? Are there groups whose low scores are being pulled up by the majority's positive experience?

Notes: _____

PROMPT 2: Who is at the intersection of TWO or more disadvantaged categories?

Consider: participants who are both non-English speaking AND elderly, or both LGBTQ+ AND experiencing homelessness for the first time. How might their experience differ from either group alone?

Notes: _____

PROMPT 3: Who is NOT in our data at all?

Which populations do we serve but have zero or near-zero responses from? Absence of data is not absence of experience — it may indicate barriers to participation in the feedback system itself.

Notes: _____

PROMPT 4: If we could hear from ONE person whose voice is missing, who would it be?

Think about the participant who is least likely to use the kiosk, least likely to trust anonymity, least likely to believe their feedback matters. What would they say?

Notes: _____

PROMPT 5: What would someone with a different cultural lens see in this data?

Our interpretation is shaped by our own identity and experience. How might someone from a different racial, cultural, or socioeconomic background read these same findings?

Notes: _____

PROMPT 6: Are our proposed solutions designed for the majority or the margins?

When we plan responses to feedback, are we solving for the average participant or for the participant with the most barriers? Universal design benefits everyone; majority design benefits the majority.

Notes: _____

PROMPT 7: What feedback would we NEVER receive through this system?

Some experiences are too traumatic, too stigmatized, or too dangerous to share even anonymously. What are we structurally unable to hear, and how does that shape what we think we know?

Notes: _____

PROMPT 8: Are we measuring what matters to the most marginalized?

Did the people most affected by inequity help design the survey questions? Or are we measuring what WE think matters, which may not reflect their priorities?

Notes: _____

Facilitation Notes

<input type="checkbox"/>	Use these prompts as discussion starters, not as yes/no checkboxes
<input type="checkbox"/>	Allow silence after each prompt — deep questions require processing time
<input type="checkbox"/>	No one should feel compelled to share personal identity information during this discussion
<input type="checkbox"/>	Record insights but not attributions — document what was learned, not who said it
<input type="checkbox"/>	If the team is homogeneous in identity, acknowledge this as a limitation and consider consulting community members

DOCUMENT 7

“What Not to Conclude” Bias Warning Checklist

Preventing harmful misinterpretation of equity data

 **INSTRUCTIONS:** *Equity data is powerful and sensitive. Misinterpreting it can cause more harm than not having it at all. This checklist identifies the most common and most dangerous misinterpretations of disaggregated feedback data. Review it before writing any equity report and before presenting findings to any audience.*

Dangerous Conclusions to Avoid

THE DATA SHOWS...	DO NOT CONCLUDE...	INSTEAD, CONSIDER...
Group A rates satisfaction lower than Group B	“Group A is harder to please” or “Group A complains more”	Group A may be receiving genuinely different treatment, facing additional barriers, or experiencing the same service through a different lens.
A racial/ethnic group reports lower safety scores	“That group has different cultural expectations about safety”	They may be experiencing real threats that other groups do not face. Investigate the specific safety concerns they raised.
Non-English speakers rate communication lower	“We can’t be expected to serve everyone in their language”	Communication is a core service quality indicator. Language barriers are organizational gaps, not participant deficits.
A small subgroup has very low scores	“The sample is too small to mean anything”	Small samples require caution in interpretation but do not require dismissal. Monitor over time. Investigate qualitatively.
No disparity is found in the current data	“We don’t have an equity problem”	Absence of evidence is not evidence of absence. Ask: who is missing from the data? Are our questions capturing what matters to every group?
Scores improve after an intervention	“The equity gap is closed”	Improvement is not the same as equity. Check: did the gap narrow, or did all groups improve equally (preserving the gap)?
One demographic group has very high scores	“That group is doing fine, we can focus elsewhere”	High averages may mask subgroup disparities within that group. Intersectionality matters.

Staff from a particular background get lower feedback	“Staff of [X background] provide worse service”	Feedback differences may reflect participant bias, communication style differences, or structural factors — not service quality.
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Language Guardrails

When writing about equity findings, use this language reference:

AVOID THIS LANGUAGE	USE THIS LANGUAGE
“Group A is more dissatisfied”	“Group A reports lower satisfaction” (attribute to the data, not the group)
“The problem with Group A’s experience”	“The gap in experience reported by Group A” (the gap is the problem, not the group)
“Vulnerable populations” (as a fixed trait)	“Populations made vulnerable by systemic conditions” (vulnerability is imposed, not inherent)
“Minority group” (when they’re the majority locally)	“Historically marginalized group” or the specific group name
“They need to...” (prescribing behavior to the group)	“Our services need to...” (centering organizational responsibility)
“Despite our efforts” (deflecting accountability)	“Our current approach has not yet closed this gap” (owning the outcome)

Pre-Report Checklist

<input type="checkbox"/>	I have not attributed a disparity to the character, culture, or choices of the affected group
<input type="checkbox"/>	I have framed gaps as organizational opportunities, not participant deficits
<input type="checkbox"/>	I have noted the sample size and confidence level for every subgroup finding
<input type="checkbox"/>	I have applied suppression rules (Document 4) to protect anonymity
<input type="checkbox"/>	I have used hedging language appropriate to the sample size (Document 3 framework)
<input type="checkbox"/>	I have not made causal claims (“X caused Y”) from correlational survey data
<input type="checkbox"/>	I have invited review from someone with lived experience similar to the affected population
<input type="checkbox"/>	I have considered intersectionality (Document 6) before declaring “no disparity found”

DOCUMENT 8

Leadership Briefing Template for Equity Findings

Presenting equity findings to decision-makers in a way that is accurate, actionable, and responsible

 **INSTRUCTIONS:** Use this template every time you present disaggregated feedback data to leadership. The format is designed to be concise (leadership attention is finite), actionable (findings without recommendations are useless), and responsible (every claim is appropriately hedged). Complete the “What Not to Conclude” checklist (Document 7) before using this template.

Briefing Header

FIELD	YOUR CONTENT
Briefing Title	Equity Gap Analysis: [Survey Period]
Prepared By	[Name, Title]
Date	
Data Source	[Survey name, period, total N]
Subgroups Analyzed	[List all groups that met reporting thresholds]
Suppressed Groups	[List groups below threshold — note they exist even if not reported]

Executive Summary (1 Paragraph)

Write a concise summary here

Structure: “Analysis of [N] responses from [period] across [variables] reveals [number] equity signals. The most significant finding is [brief statement]. [Number] findings are at the ‘substantive’ or ‘reliable’ confidence level, [number] are emerging signals being monitored. Recommended actions include [high-level summary].”

Keep this to 3-4 sentences maximum. Leadership will read this first; many will read only this.

Key Findings Table

FINDING	AFFECTED	GAP	CONFIDENCE	PERSISTE	RECOMMENDED ACTION
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	GROUP(S)	SIZE	(DOC 3)	NT?	
				Y / N / New	
				Y / N / New	
				Y / N / New	
				Y / N / New	

Context Section

For each key finding, provide a brief context paragraph that includes:

<input type="checkbox"/>	What the data shows (numbers, with appropriate hedging)
<input type="checkbox"/>	What it does NOT necessarily mean (reference Document 7 guardrails)
<input type="checkbox"/>	What additional information would strengthen or challenge this finding
<input type="checkbox"/>	Whether this finding is new, persistent, or worsening
<input type="checkbox"/>	Any intersectional dimensions worth noting (Document 6)

Recommended Actions

ACTION	URGENCY	RESOURCES NEEDED	RESPONSIBLE	TIMELINE
	Immediate / This Qtr / Next Qtr			
	Immediate / This Qtr / Next Qtr			
	Immediate / This Qtr / Next Qtr			

What We Don't Know Yet

Leadership appreciates honesty about limitations. Include a brief section noting:

LIMITATION	IMPACT ON FINDINGS	PLAN TO ADDRESS
Groups below reporting	Cannot confirm or deny	Targeted outreach to

threshold	disparities for these groups	increase response rates

Briefing Sign-Off

Prepared by: _____ Date: _____

Reviewed for bias (Doc 7): _____ Date: _____

Presented to leadership on: _____

DOCUMENT 9

Ethical Response Planning Worksheet

Designing interventions that address root causes without causing additional harm

 **INSTRUCTIONS:** Use this worksheet after identifying an equity gap through the analysis process (Documents 1–8). Before taking action, this worksheet forces you to consider whether the proposed response could inadvertently harm the population it's meant to help. Good intentions are not sufficient — ethical responses require deliberate design.

Gap Identification

FIELD	YOUR CONTENT
Equity gap identified	[Describe the disparity in 1–2 sentences]
Affected population(s)	[Specific group(s)]
Confidence level (Doc 3)	Anecdotal / Emerging / Preliminary / Substantive / Reliable
Gap first detected	[Date or quarter]
Persistent?	Yes (__ quarters) / No (first appearance)

Root Cause Analysis

Before designing a response, identify the root cause. Equity gaps can stem from different sources, and each requires a different type of intervention:

ROOT CAUSE CATEGORY	INDICATORS	EXAMPLE	APPLIES?
Access barrier	One group faces structural obstacles to receiving services equally	Non-English speakers can't read intake forms	<input type="checkbox"/>
Quality disparity	One group receives the same service but at lower quality	Staff spend less time with participants of a certain background	<input type="checkbox"/>
Cultural mismatch	Services are designed for the majority culture and don't fit other groups	Food options don't accommodate dietary practices	<input type="checkbox"/>
Bias in delivery	Implicit or explicit staff bias affects interactions with certain groups	Staff use a more dismissive tone with certain participants	<input type="checkbox"/>
Design	Programs, spaces, or	Common areas don't	<input type="checkbox"/>

exclusion	processes were designed without input from affected groups	accommodate mobility devices	
Systemic/external	The gap reflects broader societal inequities beyond the organization's direct control	Transportation barriers prevent certain groups from accessing optional programs	<input type="checkbox"/>

Ethical Safeguards

Before implementing any response, check each safeguard:

Does the Proposed Response Pass These Tests?

- VOICE TEST: Were members of the affected population consulted in designing this response? (If not, pause and consult them.)
- DIGNITY TEST: Does the response treat the affected group as agents of their own experience, not as passive recipients of help?
- SPOTLIGHT TEST: Could this response inadvertently single out or stigmatize the affected group? (e.g., a special program that “others” participants)
- BURDEN TEST: Does the response place additional burden on the affected group to “fix” the problem? (The org should adapt, not the participant.)
- BACKLASH TEST: Could this response create resentment from staff or other participants? If so, how will you manage that?
- SUSTAINABILITY TEST: Is this a one-time fix or a lasting change? Equity gaps require sustained attention, not one-off gestures.
- MEASUREMENT TEST: How will you know if the response worked? What data will you track? (See Document 10.)

Response Design

FIELD	YOUR PLAN
Proposed action(s)	[Specific steps]
Root cause addressed	[Which category from above]
Who was consulted from the affected population?	[Names/roles or method of consultation]
Potential unintended consequences	[What could go wrong?]
Mitigation for unintended consequences	[How will you prevent or respond to them?]
Resources required	[Budget, staff time, training]

Owner	[Name and role]
Timeline	[Start date, milestones, expected completion]
Success metric	[What measurable change would indicate the gap is narrowing?]
Review date	[When will you check if the response is working?]

DOCUMENT 10

Equity Follow-Up Tracking Tool

Monitoring whether equity gaps narrow, persist, or widen over time

 **INSTRUCTIONS:** This tool tracks identified equity gaps across quarters to measure whether your interventions are working. Start a row for each equity gap when it's first detected, and update it quarterly. Gaps that persist for 3+ quarters without improvement require escalation. This is the accountability backbone of your equity work.

Active Gap Tracker

GAP ID	DESCRIPTION	AFFECTED GROUP	FIRST DETECTED	BASELINE GAP SIZE	INTERVENTION	OWNER
EG-001						
EG-002						
EG-003						
EG-004						
EG-005						

Quarterly Progress Log

Update this log at the end of each quarter for every active gap:

GAP ID	QUARTER	CURRENT GAP SIZE	DIRECTION	INTERVENTION STATUS	NOTES / ADJUSTMENTS
	Q_20__		↑ Widening / → Stable / ↓ Narrowing	Not Started / In Progress / Complete	
	Q_20__		↑ / → / ↓		
	Q_20__		↑ / → / ↓		
	Q_20__		↑ / → / ↓		
	Q_20__		↑ / → / ↓		

	Q_20__		↑ / → / ↓		
	Q_20__		↑ / → / ↓		
	Q_20__		↑ / → / ↓		

Escalation Thresholds

PATTERN	STATUS	REQUIRED ACTION
Gap narrowing for 2+ consecutive quarters	 Positive Trend	Continue current intervention. Document as emerging success story.
Gap stable for 2 consecutive quarters	 Stalled	Review intervention design. Consult affected population. Adjust approach.
Gap widening for 1+ quarters	 Worsening	Immediate leadership briefing. Root cause re-analysis (Doc 9). New intervention required.
Gap persists 3+ quarters without improvement	 Entrenched	Executive escalation. External consultation recommended. Intervention overhaul.
Gap closed (≤ 0.25 points or ≤ 5 percentage points)	 Resolved	Monitor for 2 additional quarters. If sustained, close the gap and celebrate.

Annual Equity Summary

At year-end, complete this summary for leadership and board reporting:

METRIC	THIS YEAR
Total equity gaps identified this year	
Gaps resolved (closed)	
Gaps narrowing (positive trend)	
Gaps stalled (no improvement)	
Gaps worsening	
Gaps escalated to leadership	
New gaps detected this year	
Populations consulted in response design	
Budget allocated to equity interventions	

Closure Criteria

An equity gap can be marked “resolved” when ALL of the following are true:

<input type="checkbox"/>	The gap has been ≤ 0.25 points (5-point scale) or ≤ 5 percentage points for 2 consecutive quarters
<input type="checkbox"/>	The affected population's scores are within the normal range of variation for all groups
<input type="checkbox"/>	No qualitative signals (open-ended feedback) suggest the issue persists beneath the numbers
<input type="checkbox"/>	Members of the affected population, when consulted, confirm improvement in their experience
<input type="checkbox"/>	The intervention is embedded in ongoing operations (not dependent on a single person or temporary funding)

Sign-Off

Quarterly review completed by: _____ Date: _____

Equity reviewer: _____ Date: _____

End of Toolkit

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

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