

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

Feedback

Prioritization Toolkit

A structured system for deciding what to act on, what to plan for, and what to monitor. This toolkit contains 10 ready-to-use documents covering triage, prioritization matrices, equity weighting, cross-team alignment, anti-bias safeguards, and quarterly reprioritization — so feedback drives action, not overwhelm.

10 Decision-Making Documents

Matrices • Decision Trees • Worksheets • Facilitation Guides

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Toolkit Contents

This toolkit provides a structured decision-making system for translating participant feedback into prioritized action. Each document addresses a different dimension of the prioritization challenge.

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DOCUMENT 1

Impact vs. Effort Prioritization Matrix

A visual framework for plotting feedback items by potential impact and implementation effort

 **INSTRUCTIONS:** Use this matrix in your prioritization meetings (see Document 8). List every actionable feedback theme, score it on both dimensions, then plot it into the appropriate quadrant. Start in Quadrant 1 (Quick Wins) and work clockwise. Items in Quadrant 4 should be dropped or deferred unless they surface again.

The Four Quadrants

↑ HIGH IMPACT	↑ HIGH IMPACT
<p> QUADRANT 1: QUICK WINS</p> <ul style="list-style-type: none"> • High impact, low effort • Do these FIRST • Build momentum and credibility • Examples: signage improvements, schedule adjustments, simple process fixes 	<p> QUADRANT 2: STRATEGIC PROJECTS</p> <ul style="list-style-type: none"> • High impact, high effort • Plan and resource these • Assign owners and timelines • Examples: facility renovations, new programs, staffing model changes
↓ LOW IMPACT	↓ LOW IMPACT
<p> QUADRANT 3: FILL-INS</p> <ul style="list-style-type: none"> • Low impact, low effort • Do when capacity allows • Don't prioritize over Q1 or Q2 • Examples: minor aesthetic fixes, optional extras, nice-to-haves 	<p> QUADRANT 4: NOT NOW</p> <ul style="list-style-type: none"> • Low impact, high effort • Defer or eliminate • Revisit only if feedback persists • Examples: requests that benefit very few, expensive low-value changes
← LOW EFFORT	HIGH EFFORT →

Scoring Guide

Impact Score (1-5)

SCORE	IMPACT LEVEL	CRITERIA
5	Critical	Affects physical safety, basic needs, or dignity of participants
4	High	Affects majority of participants; tied to core satisfaction drivers
3	Moderate	Affects a significant subset; improves experience meaningfully
2	Low	Affects a small group; incremental improvement

DOCUMENT 2

Safety & Urgency Triage Checklist

An immediate triage protocol for time-sensitive or safety-related feedback

 **INSTRUCTIONS:** Apply this checklist *BEFORE* the Impact vs. Effort matrix (Document 1). Safety and urgency items bypass normal prioritization — they go straight to the top. Run through this checklist every time new feedback is reviewed, whether daily, weekly, or as alerts arrive.

Tier 1: Immediate Action (Within 24 Hours)

These items require same-day response. They do not enter the normal prioritization queue.

TRIGGER	EXAMPLE	RESPONSE
Imminent physical danger	Participant reports broken stairs, exposed wiring, or assault	Escalate to safety officer immediately. Fix hazard or secure area.
Self-harm or suicidal ideation	Open-ended response indicates active suicidal intent	Follow escalation protocol (Anonymity Toolkit Doc 8). Contact crisis team.
Active abuse or neglect	Feedback describes ongoing abuse by staff or another participant	Report per mandatory reporting obligations. Document and escalate.
Critical service failure	Medication not administered, locked out of shelter in dangerous weather	Investigate and resolve within hours. Notify leadership.

Tier 2: Urgent (Within 1 Week)

These items require rapid attention but do not constitute an emergency.

TRIGGER	EXAMPLE	RESPONSE
Recurring safety concern	Multiple participants report feeling unsafe in a specific area	Investigate within 48 hours. Implement interim measures.
Significant dignity violation	Consistent reports of disrespectful treatment by staff	Begin inquiry within 3 business days. Assign supervisor.
Service disruption pattern	Feedback shows a service has been unreliable for 2+ weeks	Identify root cause and timeline for fix within 1 week.

Emerging cluster	3+ similar negative comments on the same issue within a short period	Flag for priority discussion at next team meeting.
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Tier 3: Important but Not Urgent (Standard Queue)

These items enter the normal prioritization process via the Impact vs. Effort Matrix (Document 1).

TRIGGER	EXAMPLE	RESPONSE
Quality improvement opportunity	Food quality rated below average consistently	Add to prioritization queue. Score using matrix.
Environment enhancement	Participants request better lighting or seating	Add to queue. Assess effort and impact.
Program suggestion	Requests for additional activities or services	Add to queue. Evaluate feasibility.
Communication gap	Participants don't know who to talk to about concerns	Add to queue. Likely a Quick Win.

Triage Decision Log

DATE	FEEDBACK SUMMARY	TIER	ACTION TAKEN	RESOLVED?
		1 / 2 / 3		Y / N
		1 / 2 / 3		Y / N
		1 / 2 / 3		Y / N
		1 / 2 / 3		Y / N
		1 / 2 / 3		Y / N
		1 / 2 / 3		Y / N

DOCUMENT 3

Act Now / Plan Later / Monitor Only

A step-by-step decision tree for routing every feedback theme to the right action lane

 **INSTRUCTIONS:** Walk through this decision tree for each feedback theme that emerges from your data. Start at Step 1 and follow the arrows. The tree routes each item to one of three action lanes: Act Now, Plan Later, or Monitor Only. Document the routing decision using the log at the bottom.

The Decision Tree

STEP 1: Does this feedback indicate a safety risk or urgent need?

- **YES:** Go directly to the Safety Triage Checklist (Document 2). Do not continue this tree.
- **NO:** Continue to Step 2.

STEP 2: Has this theme appeared in feedback from 3 or more respondents (or $\geq 10\%$ of responses)?

- **YES:** This is a validated pattern. Continue to Step 3.
- **NO:** This may be an individual experience. Go to MONITOR ONLY lane.

STEP 3: Can we address this with existing resources (no new budget, no new staff, no leadership approval needed)?

- **YES:** Go to ACT NOW lane. Assign an owner and a 2-week deadline.
- **NO:** Continue to Step 4.

STEP 4: Does this require budget, staffing changes, or leadership approval?

- **YES, but feasible this quarter:** Go to PLAN LATER lane. Add to the next prioritization meeting agenda.
- **YES, and not feasible this quarter:** Go to MONITOR ONLY lane. Document and revisit next quarter.

Action Lane Definitions

LANE	DEFINITION	TIMELINE	DOCUMENTATION
● ACT NOW	Can be resolved with existing resources. No approvals needed.	2 weeks	Assign owner. Set deadline. Report completion.
● PLAN LATER	Requires resources or approvals but is feasible within the quarter.	This quarter	Add to project plan. Assign owner. Track milestones.
● MONITOR ONLY	Not enough data, not feasible now, or low priority. Watch for patterns.	Review next quarter	Log in Document 7. Note why deferred. Check for trend.

Routing Log

FEEDBACK THEME	STEP REACHED	LANE	OWNER	DEADLINE	RATIONALE

DOCUMENT 4

Cross-Team Alignment Worksheet

A shared prioritization framework for when feedback spans multiple departments or sites

 **INSTRUCTIONS:** Use this worksheet when feedback touches more than one team. Common examples: a safety concern that involves both facilities and program staff, or a communication gap that spans intake and case management. The goal is shared ownership, not finger-pointing. Complete this worksheet during a cross-team meeting with representatives from all affected areas.

Meeting Setup

FIELD	DETAILS
Date	
Facilitator	
Teams Represented	
Feedback Theme(s)	
Data Source	Survey period, # of responses, score trends

Shared Feedback Analysis

FEEDBACK THEME	WHICH TEAMS ARE INVOLVED?	EACH TEAM'S PERSPECTIVE	SHARED ROOT CAUSE?

Ownership Matrix

For each action item, identify a single accountable owner (even when multiple teams contribute). Use the RACI model: Responsible (does the work), Accountable (owns the outcome), Consulted (provides input), Informed (kept in the loop).

ACTION ITEM	RESPONSIBLE	ACCOUNTABLE	CONSULTED	INFORMED	DEADLINE

Alignment Agreements

<input type="checkbox"/>	All teams agree on the root cause analysis for each feedback theme
<input type="checkbox"/>	A single accountable owner has been named for every action item
<input type="checkbox"/>	Deadlines are realistic and account for each team's current workload
<input type="checkbox"/>	Communication plan is in place: who reports progress, to whom, and how often
<input type="checkbox"/>	Escalation path is defined if progress stalls (who makes the call?)
<input type="checkbox"/>	Follow-up meeting is scheduled to review progress (recommended: 4 weeks)
<input type="checkbox"/>	Results will be shared back with staff and participants when complete

Conflict Resolution Protocol

When teams disagree on priorities or ownership, use this escalation ladder:

LEVEL	ACTION	WHO DECIDES
1. Discussion	Teams present their perspectives. Facilitator seeks consensus.	Joint agreement
2. Data check	Review feedback data together. Let the data break the tie.	Data-driven decision
3. Leadership tiebreak	Escalate to a shared supervisor or executive sponsor.	Designated leader
4. Executive decision	If unresolved, the executive sponsor makes the final call.	Executive sponsor

DOCUMENT 5

Resource Constraint Assessment Tool

Mapping available budget, staff capacity, and time against feedback-driven action items

 **INSTRUCTIONS:** Complete this assessment before your prioritization meeting (Document 8). Knowing your actual constraints prevents committing to actions you can't deliver — and broken commitments erode trust faster than no action at all. Update quarterly.

Budget Constraints

CATEGORY	AVAILABLE THIS QUARTER	ALREADY COMMITTED	REMAINING	NOTES
Discretionary improvement budget				
Facility/maintenance budget				
Training/professional development				
Technology/equipment				
Other: _____				

Staff Capacity

ROLE / TEAM	CURRENT WORKLOAD (1-5)	AVAILABLE HOURS/WEEK FOR NEW PROJECTS	SKILL MATCH?	NOTES
			Y / N	
			Y / N	
			Y / N	
			Y / N	
			Y / N	

Workload scale: 1 = Light (significant spare capacity), 2 = Manageable, 3 = Full (no spare capacity without trade-offs), 4 = Overloaded, 5 = Crisis-level

Timeline Constraints

<input type="checkbox"/>	Are there regulatory deadlines, accreditation reviews, or grant reporting dates that affect timing?
<input type="checkbox"/>	Are there seasonal patterns (holidays, weather, intake surges) that limit implementation windows?
<input type="checkbox"/>	Are there other organizational initiatives competing for the same resources?
<input type="checkbox"/>	Is leadership availability a bottleneck for approvals?
<input type="checkbox"/>	Are vendor or contractor lead times a factor for any proposed changes?

Constraint-Adjusted Priority Assessment

After completing the sections above, revisit your Impact vs. Effort Matrix (Document 1) and adjust effort scores based on real constraints:

FEEDBACK THEME	ORIGINAL EFFORT SCORE	CONSTRAINT FACTORS	ADJUSTED EFFORT	STILL FEASIBLE THIS QTR?
				Y / N
				Y / N
				Y / N
				Y / N
				Y / N

Key Principle

Under-promise, over-deliver

It is always better to commit to 3 actions and complete all 3 than to commit to 10 and complete 4.

Incomplete actions erode trust in the feedback system more than limited action does.

If resources are genuinely limited, be transparent with staff and participants about what you can and cannot do — and why.

Use resource constraints as a reason to focus, not as an excuse for inaction.

DOCUMENT 6

Equity-Weighted Prioritization Lens

Ensuring feedback from marginalized and underrepresented participants isn't systematically deprioritized

INSTRUCTIONS: Apply this lens AFTER scoring items on the Impact vs. Effort Matrix (Document 1) and BEFORE making final priority decisions. Standard prioritization methods can inadvertently disadvantage smaller or less vocal populations. This lens adds an equity adjustment to ensure fairness.

Why Equity Weighting Matters

Standard prioritization favors the majority. If 80% of your participants rate food as satisfactory, but the 20% who don't are disproportionately from a specific cultural or dietary group, their needs may be deprioritized. Equity weighting corrects for this by asking: whose voices are we at risk of marginalizing?

Equity Adjustment Criteria

For each feedback theme, ask these questions. Each "Yes" adds +1 to the item's Impact score (max adjustment: +3).

EQUITY QUESTION	IF YES, WHY IT MATTERS	+1?
Does this feedback come disproportionately from a historically marginalized group (racial/ethnic minority, LGBTQ+, people with disabilities, non-English speakers)?	These groups often have fewer alternative channels to be heard.	<input type="checkbox"/>
Does addressing this issue reduce a barrier to access or participation for an underserved population?	Equity means removing barriers, not just improving average experience.	<input type="checkbox"/>
Would inaction on this issue widen an existing disparity in service quality or outcomes?	Inaction on equity gaps is itself a form of harm.	<input type="checkbox"/>
Is this issue invisible to leadership because the affected group is small, quiet, or transient?	Low volume does not mean low importance.	<input type="checkbox"/>
Does this issue affect participants who are most vulnerable (e.g., unaccompanied minors, people in crisis, those with cognitive impairments)?	Vulnerability amplifies impact.	<input type="checkbox"/>

Equity-Adjusted Scoring Worksheet

FEEDBACK THEME	BASE IMPACT	EQUITY ADJ (+0 to +3)	ADJUSTED IMPACT	NEW QUADRANT?

Equity Red Flags

Watch for these patterns in your data that may indicate systemic equity issues:

<input type="checkbox"/>	A specific demographic group consistently rates satisfaction lower than the overall average
<input type="checkbox"/>	Open-ended feedback from a subgroup raises issues no one else mentions (cultural food needs, language barriers, accessibility)
<input type="checkbox"/>	Response rates are significantly lower from certain populations (may indicate the survey itself is inaccessible)
<input type="checkbox"/>	The same equity issue surfaces quarter after quarter without being addressed
<input type="checkbox"/>	Staff dismiss feedback from certain groups as “complaining” or “unrealistic”
<input type="checkbox"/>	Improvements are consistently made to issues raised by the majority while minority concerns are deferred

Equity Review Sign-Off

Before finalizing priorities each quarter, the equity lens must be reviewed:

Equity Reviewer: _____ Date: _____

Were any items adjusted based on equity criteria? Yes No

If Yes, list adjusted items:

DOCUMENT 7

Action Documentation Template

Recording why feedback was or wasn't acted on — accountability and institutional memory

 **INSTRUCTIONS:** Complete one entry for every feedback theme reviewed during prioritization. This creates a permanent record of decision-making that protects against amnesia (“Why didn’t we address this?”), supports grant reporting, and builds institutional knowledge. Update the status column as actions progress.

Action Taken: Documentation Template

FIELD	YOUR CONTENT
Feedback Theme	[Summary of the feedback trend]
Data Source	[Survey period, number of responses, score or percentage]
Priority Lane	Act Now / Plan Later / Monitor Only
Quadrant (Doc 1)	Q1 Quick Win / Q2 Strategic / Q3 Fill-In / Q4 Not Now
Equity Adjustment?	Yes (+_) / No
Decision	[What we decided to do and why]
Action Item(s)	[Specific steps being taken]
Owner	[Name and role]
Deadline	[Target date]
Resources Required	[Budget, staff hours, materials]
Status	Not Started / In Progress / Complete / Stalled
Outcome	[What changed? Include before/after data if available.]

No Action Taken: Documentation Template

Equally important: documenting why you chose NOT to act on something. This prevents the same item from being endlessly re-debated and demonstrates thoughtful decision-making to funders and boards.

FIELD	YOUR CONTENT
Feedback Theme	[Summary of the feedback]
Data Source	[Survey period, number of responses]

DOCUMENT 8

Prioritization Meeting Facilitation Guide

Running effective, bias-resistant prioritization sessions that produce clear action items

 **INSTRUCTIONS:** Use this guide to facilitate your quarterly (or monthly) prioritization meeting. The facilitator should be someone who can remain neutral and keep the conversation focused on data. Prepare all materials in advance. The meeting should produce a prioritized action list with owners and deadlines — not a vague discussion about feelings.

Meeting Setup

FIELD	DETAILS
Duration	60-90 minutes (never longer — set a hard stop)
Frequency	Quarterly (monthly during first year of feedback collection)
Attendees	Program leadership, site supervisors, data/quality staff, equity representative
Facilitator	[Name] — should NOT be the most senior person in the room
Materials	Printed: feedback summary, Documents 1, 3, 5, 6, 9. Blank copies of Document 7.

Agenda

TIME	SEGMENT	FACILITATOR ACTIONS
0:00-5:00	Ground Rules & Data Review	Read the Anti-Bias Checklist (Doc 9) aloud. Distribute feedback summary. Give 3 minutes for silent reading.
5:00-15:00	Safety Triage	Walk through Doc 2. Identify any Tier 1 or 2 items. These get immediate assignment — no debate needed.
15:00-30:00	Impact/Effort Scoring	Score each remaining theme using Doc 1 criteria. Use round-robin scoring: each person scores independently, then average. Record on the plotting worksheet.
30:00-40:00	Equity Lens	Apply Doc 6 equity adjustment. Ask each equity question for every theme. Adjust impact scores.
40:00-50:00	Resource Reality Check	Review Doc 5 constraints. Adjust effort scores if needed. Move items between quadrants if constraints changed.
50:00-	Decision & Assignment	Walk each item through Doc 3 decision tree. Assign

65:00		lanes: Act Now / Plan Later / Monitor. For Act Now: assign owner and 2-week deadline. For Plan Later: assign owner and milestone.
65:00–80:00	Documentation	Complete Doc 7 for every theme — including items NOT acted on. Capture rationale in real time.
80:00–90:00	Close & Communication Plan	Decide: what gets shared with staff? With participants? Who writes it? Deadline for communication. Schedule next meeting.

Facilitation Tips

<input type="checkbox"/>	Start with data, not opinions. Show the numbers before anyone speaks.
<input type="checkbox"/>	Use silent scoring before group discussion to prevent anchoring bias.
<input type="checkbox"/>	If one person dominates, explicitly invite others: “[Name], what’s your score on this one?”
<input type="checkbox"/>	If debate exceeds 5 minutes on a single item, table it and move on. Revisit at end if time allows.
<input type="checkbox"/>	Never let seniority override data. The executive’s opinion counts the same as anyone else’s score.
<input type="checkbox"/>	End with clear assignments: every Act Now item has an owner and a date. No exceptions.
<input type="checkbox"/>	Close by reading one positive feedback quote. End on a note of purpose, not just process.

Post-Meeting Checklist

<input type="checkbox"/>	All decisions documented using Document 7 template
<input type="checkbox"/>	Meeting notes distributed to all attendees within 48 hours
<input type="checkbox"/>	Act Now items added to relevant team task lists with deadlines
<input type="checkbox"/>	Plan Later items added to quarterly project tracker
<input type="checkbox"/>	Monitor Only items logged for next quarter’s review
<input type="checkbox"/>	Staff communication scheduled (use Staff Buy-In Toolkit templates)
<input type="checkbox"/>	Participant communication (“What We Heard”) scheduled
<input type="checkbox"/>	Next prioritization meeting date confirmed on all calendars

DOCUMENT 9

Anti-Bias Checklist

Preventing leadership from over-weighting anecdotes, recency, and personal preferences

 **INSTRUCTIONS:** Read this checklist aloud at the start of every prioritization meeting (Document 8). Post it visibly in the meeting room. The facilitator should reference specific items if they observe bias during discussion. This is not about accusing anyone — it's about creating structural guardrails against natural human tendencies.

Cognitive Biases in Feedback Prioritization

These are natural human tendencies, not character flaws. Everyone is susceptible. The solution is awareness and process — not willpower.

BIAS	WHAT IT LOOKS LIKE	GUARDRAIL
Anecdote Bias	A single dramatic story dominates the conversation, even when data shows it's an outlier.	Always ask: "How many responses reflect this?" before discussing solutions.
Recency Bias	The most recent feedback gets outsized attention because it's fresh in memory.	Review the full quarter's data, not just the last week. Weight by volume.
Authority Bias	The most senior person's opinion carries more weight, even when it contradicts data.	Use independent scoring before group discussion. Average scores, don't defer.
Confirmation Bias	Leaders prioritize feedback that confirms what they already believe.	Ask: "What feedback surprised us?" Deliberately discuss unexpected findings.
Availability Bias	Issues that are visible (lobby cleanliness) get prioritized over invisible ones (dignity, privacy).	Score all items using the same criteria. Don't skip items because they're less tangible.
Squeaky Wheel Bias	Staff who complain loudest about participant feedback get their concerns prioritized.	Prioritize based on participant data, not staff comfort.
Optimism Bias	Overestimating capacity to take on more actions than realistically possible.	Complete the Resource Constraint Assessment (Doc 5) before committing.
Status Quo Bias	Defaulting to "we've always done it this way" when feedback suggests change.	Ask: "If we were starting from scratch, would we do it this way?"

Pre-Meeting Pledge

Read Aloud at Meeting Start

“Before we begin, a quick reminder of our commitments:

1. We will lead with data, not stories. A single quote is an illustration, not a priority.
2. We will score independently before discussing. No one’s opinion outranks the numbers.
3. We will apply the equity lens. Quiet voices count as much as loud ones.
4. We will be honest about our constraints. Over-promising is worse than under-promising.
5. We will document every decision — including what we chose NOT to do and why.
6. We will challenge each other respectfully if we see bias creeping in.

Let’s get started.”

Bias-Check Questions for the Facilitator

Use these phrases during the meeting when you suspect bias is influencing the discussion:

WHEN YOU NOTICE...	SAY THIS...
One person’s story dominates	“That’s a powerful example. How many responses reflect this same theme?”
Only recent feedback is discussed	“Let’s look at the full quarter. Was this a trend or a recent spike?”
The boss speaks first and everyone agrees	“Let’s hear from everyone before we consolidate. [Name], what’s your score?”
Easy/visible fixes get all the energy	“We’ve covered the tangible items. Let’s look at dignity, communication, and access.”
Someone says “We’ve always done it this way”	“If we were building this program today, would we design it like this?”
The group is committing to too much	“Let’s check the resource assessment. Can we realistically deliver all of this?”
Feedback from a small group is dismissed	“Small group, but high impact. Let’s apply the equity lens before we move on.”

DOCUMENT 10

Quarterly Reprioritization Cadence Template

A structured cycle for reviewing, adjusting, and communicating priorities every quarter

 **INSTRUCTIONS:** This template defines the full quarterly cycle from data preparation through action review and communication. Pin this cadence to your organizational calendar at the start of each year. Consistency is more important than perfection — a mediocre quarterly review that actually happens beats a perfect annual review that doesn't.

Quarterly Cycle Overview

WEEK	PHASE	ACTIVITIES	RESPONSIBLE
Week 1	Data Preparation	Pull quarterly feedback summary. Calculate trends. Identify new themes. Flag safety/urgency items.	Data/Quality Lead
Week 2	Pre-Meeting Prep	Complete Resource Constraint Assessment (Doc 5). Distribute feedback summary to all meeting attendees. Pre-read period: 3+ days.	Facilitator + Data Lead
Week 3	Prioritization Meeting	Facilitate meeting using Doc 8 agenda. Score, triage, assign, and document all decisions using Docs 1-7, 9.	Facilitator
Week 3	Documentation	Complete Action Documentation (Doc 7) for every theme. Distribute meeting notes within 48 hours.	Facilitator + Note-taker
Week 4	Communication	Share results with staff (use Staff Buy-In Toolkit). Post "What We Heard" update for participants. Update success stories (Doc 9 of Staff toolkit).	Program Leadership
Weeks 5-12	Execution & Monitoring	Act Now items executed. Plan Later items tracked. Monitor Only items logged. Mid-quarter check-in at Week 8.	Action Item Owners
Week 12-13	Quarter-End Review	Review all action items. Update statuses. Prepare data for next cycle. Celebrate completions.	Data Lead + Leadership

Quarter-End Review Checklist

<input type="checkbox"/>	All Act Now items from last quarter: reviewed for completion status
<input type="checkbox"/>	All Plan Later items: reviewed for milestone progress

<input type="checkbox"/>	All Monitor Only items: reviewed for emerging trends (did the pattern grow?)
<input type="checkbox"/>	Any items that stalled: documented with reason and new plan
<input type="checkbox"/>	Success stories identified and documented for staff communication
<input type="checkbox"/>	Data preparation for next quarter has begun
<input type="checkbox"/>	Next quarter's prioritization meeting is scheduled

Rolling Priority Tracker

Use this tracker to carry items across quarters. Items that remain in "Monitor Only" for 3+ quarters without action should be either escalated or formally closed.

THEME	Q1 STATUS	Q2 STATUS	Q3 STATUS	Q4 STATUS	FINAL DISPOSITION

Annual Calibration

Once per year (recommend Q4), conduct a deeper review:

<input type="checkbox"/>	Review all 4 quarters' documentation. What patterns span the entire year?
<input type="checkbox"/>	Are there systemic issues that keep appearing but never get resolved?
<input type="checkbox"/>	Did the equity lens surface issues that were addressed? Or are equity gaps persisting?
<input type="checkbox"/>	Are resource constraints improving, stable, or worsening?
<input type="checkbox"/>	Is staff trust in the feedback system improving? (Check Adoption Health Checklist from Staff Toolkit)
<input type="checkbox"/>	Are participants responding more, less, or the same? What does volume trend tell us?
<input type="checkbox"/>	Update the prioritization framework itself: are the scoring criteria still relevant?
<input type="checkbox"/>	Set strategic feedback priorities for the coming year based on cumulative data

Sign-Off

Quarterly review completed by: _____ Date:

Next quarterly meeting scheduled for: _____

End of Toolkit

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