Report Feedback Guidance

As you review grantee reports, you may want to consider some key questions which we have outlined below. Feel free to utilize the proposed template responses and customize as needed.

Report Section	Key Questions	Template Response Options
Overview: Report Title	Does the report title accurately describe the program being reported on? Ensure the report title can be understandable by any stakeholder that may review the report.	Please use the program's formal name so it is easily recognizable by internal and external stakeholders. Please avoid program descriptors or dates that are not part of the formal program name (this information goes in the Description and Date fields below). Please do not reference an individual donor's name unless it is a formal part of the program (i.e., the donor has earned naming rights), as this report may be shared with multiple donors. For easy readability, please use "title capitalization" - i.e., capitalize the first letter of each word in the program name, and avoid capitalizing all letters unless the name is an acronym or stylized as "all caps."
Overview: Report Description	Is the report description sufficient? If you were not previously aware of the program, would this description provide you with enough information about what the program does and what it's trying to achieve?	Please provide sufficient detail so a person unfamiliar with the program will have a general understanding of how it works and what it's trying to achieve Suggested content/format: "We help [your target beneficiaries] achieve [what successful outcome] through [detailed summary of your services]."
Overview: Investment	Is the investment amount correct? Is the level (Incremental, Significant, Foundational) appropriate for the partnership? Note that the grantee determines this designation. If there is a discrepancy between the grantee and donor understanding of this funding tier, it may be worth a discussion with the grantee.	You've classified this investment as "foundational" -- however, given the relatively small size of the grant as compared to the total cost of the program, "incremental" or "significant" could be a better fit. Foundational should be selected if your donor's investment is so important to your program that without it, your program could not function and/or they catalyzed additional investments into your program. If you would like to update the Funding Tier, you can make this change in your Budget section. You've classified this investment as "incremental" -- however, you indicate that this investment covers 100% of the program costs. First, note that the budget information should cover the full cost of the program, not just the part supported by this particular investment. If there are additional expenses, please update your budget to reflect this. Otherwise, if this program might not have occurred if this donor didn't support it, consider reclassifying this investment to be "foundational." If you would like to update the Funding Tier, you can make this change in your Budget section.
Overview: Report Dates + Stage	Does the report stage match the report timeline? Initial = program just beginning, Interim = program	Is this the correct stage? Given the start and end dates for this report, the stage seems incorrect. If the program you are reporting on has yet to start or has just started, select Initial Report; if it's substantially underway, select Interim Report; if

	underway, Final = program has finished. You may also want to ensure the stage and dates are consistent with the grant agreement. [Here's a helpful article about reporting dates.]	it's completed or almost so, select Final Report. Is this the correct start date? Enter the first day of this report's "reporting term" (i.e., the span of days covered by this report; typically a distinct funding period). If this is a continuously operating program, consider using the beginning of the calendar year (01-Jan-20XX) or the beginning of your organization's fiscal year, if different. Please double-check that the time span you are reporting on matches up with your grant reporting obligations. More guidance can be found here: https://support.trueimpact.com/what-time-period-should-my-report-cover
Overview: Location	Are the locations listed correctly? These should represent where the implementation occurs.	Is your program being implemented in multiple distinct locations? If so, enter each location in separate location fields. Rather than providing a state or country, please provide more granular location information so we can better understand the specific locations where your work is occurring.
Intervention	Does the core service and associated information well represent the program? Is there additional narrative description included?	Core service should align with the main function of your program. Based on your program description, your program might better be defined as … Can you provide some brief, additional descriptive information about your core services or activities so a reader that is unfamiliar with your program will understand how your program achieves its goals?
Beneficiaries	Do the selected demographics include populations indicated by the grant agreement? Where possible/relevant, we encourage reports to include gender, socio-economic status, ethnic background, and age along with a brief written narrative about their beneficiaries. [More guidance can be found here.]	Have you selected all of the relevant demographic categories (of significance) for your target beneficiaries? Please include percentages for gender, socioeconomic status, and race/ethnicity if possible.It's fine for the percentages to total more than 100%. Can you provide additional descriptive information on your program's target beneficiaries? This is an opportunity to provide a more detailed picture of the people whose lives are being improved by your program, which can make your social impact report more relatable and compelling to readers. More guidance can be found here: https://support.trueimpact.com/how-do-i-complete-the-beneficiary-section
Outcomes: Logic Model	Is an appropriate service/logic model selected? Pay attention to the full logic model presented, not just the name of it. The key is whether the appropriate Social Impact indicators are selected. If a full report has been drafted and the service model should be changed, please contact True Impact for support. This can be complicated for a grantee to navigate and may be easier for True Impact to	We are interested to learn more about why you selected this logic model template. Let's connect to discuss further.

	update.	
Outcomes: Indicator Definition	Have they adequately defined the indicator under the “Success Criteria?” This section should provide you with a clear threshold for success to understand the indicator and how they are measuring success in their work. If needed, backup documentation can be attached to provide further context.	Please define how much an individual participant has to participate in, or be exposed to, the program to be considered successfully reached or served. A good way to do this is to start the info in Step 1 with "A student is successfully reached when.." and continue with ... they attend at least one session, or .. available in their Zip Code, or ... their parents meet with a staff member.
Outcomes: Measurement Category	Are the selected measurement categories (Guess, Estimate, Directly Measure) appropriate? Have they adequately described their measurement approach under the “Sources/Assumptions?” Is backup documentation provided if needed? All indicators in Program Development should be Directly Measured.	Ensure your measurement type matches how you generate data for this indicator. Does your selection need to be adjusted from Guess to Measured? Ensure your measurement type matches how you generate data for this indicator (tip: directly measured data typically do not require calculation, while estimations or guesses often do). Does your selection need to be adjusted? Please ensure that your measurement categories align with how you plan to measure your outcomes by the end of your report period (rather than how you are arriving at your forecasted figures now). It seems likely that many of your outcomes will likely be measured through tracking tools or estimated through existing evidence or other data sources. Please review your measurement details for each indicator and update accordingly.
Outcomes: Indicator Alignment	Are the forecasted or final indicator values reflective of the outcomes to be achieved/achieved during the reporting period designated on the report? Recall, the reporting period, indicator values, and budget should all align so that a cost per outcome can be calculated.	The forecasted or achieved indicator values should align with your budget and reporting period. Are the forecasted or achieved indicator values reported all meant to occur or be caused during this designated reporting period and within the associated budget? If not, please adjust accordingly. For Initial and Interim reports, your report will forecast the impacts caused during this selected reporting period. This is an important distinction to note as there are often medium or long term impacts that are caused within a reporting period but not yet realized.
Outcomes: Program Development	Ensure that the Program Development indicators are representative of internal capacity building / organizational efforts related to supporting this program. These indicators should describe how the program itself is strengthened in order to provide services to beneficiaries. The Program Development section is optional.	This section should focus on how your program is strengthened in order to reach your beneficiaries. What program resources will be developed to help deliver information to your stakeholders? If you'd like to remove this indicator, you can unselect it from Outcomes ---> Relevant ---> Capacity Developed.
Outcomes: Reach	Are the forecasted or actual indicator values aligned to the measurement units? It can help to check the Success Criteria against the indicator	Does this entry correctly account for the indicator's unit of measurement? It appears inconsistent with the other social impact information you've entered.

	definition to ensure this alignment. For example, most indicators in the Reach section should be measured in people units (not # businesses, dollars, etc.). There are some exceptions such as trees planted or meals distributed.	
Outcomes: Learn + Act	The Learn and Act sections are optional. Does the report need these sections but they are missing? Or more commonly, does the report include them but they are unnecessary and feel duplicative of other information included in other sections? Not all programs need to include indicators capturing behavior change, such as some education models.	You can simplify your model by removing the Learn and Act stages. It is reasonable for your theory of change to suggest that simply by engaging people (Reach) your project or program creates social impacts (Succeed). You can unselect Learn and/or Act by going to Outcomes ---> Relevant and then unselecting either or both indicators. Please consider whether "Take Action" is a part of your model. If there is a behavior change aspect to your program, this needs to be more strongly defined in Step 1 of the Act stage of the logic model. If not, please remove the indicator by deselecting it. Note that many educational programs do not include an Act stage as students are impacted directly by learning. Please consider whether Learning is a part of your model. If there is a learning aspect to your program, this needs to be more strongly defined in Step 1 of the Learn stage of the logic model. If not, please remove the indicator by deselecting it.
Outcomes: Social Impact	Based on your understanding of the program through the program description and intervention section, are there any Social Impact indicators missing from the logic model? Does the logic model sufficiently capture the impacts of the program and illustrate how lives are improved?	You might consider pulling in a different social impact to best capture the full story of your program's anticipated outcomes. You can search for additional social impacts by clicking on the "Search for Additional Social Impact Results" button in Outcomes ---> Indicators ----> Succeed and then search for other indicators that may better capture the true impact of your program.
Outcomes: Custom Indicators	Ideally, encourage the organization to select an existing template indicator rather than defining a custom indicator. This allows for clarity of impact across a portfolio.	A non-standard custom indicator has been utilized in your logic model. Let's explore whether an existing indicator may meet your needs. Ideally, we try to utilize the existing indicator options rather than using a custom indicator. Keep in mind that even for the standard indicator options we provide grantees the opportunity to define what it means for them.
Documentation	If needed, ensure backup documentation is attached. They are not required. There are several opportunities for documentation uploads: within specific indicators, at the end of the Outcome section, and at the end of the Budget section.	If available, can you upload copies of the instruments or data sources referenced above, to provide context to your donors? Please consider uploading a full line item budget for this program to provide further context to any reader of this social impact report.
Budget	Is the budget representative of the entire program during this reporting period? If the budget value is the	Please ensure this entry (and the other line items) captures the full cost of the program overall, not just an allocation of a grant received.

	same as the investment amount, this suggests that this investment is the only donor to the program.	Ensure that your program budget is aligned with the selected reporting period. It’s important to include only and all costs associated with the specific reporting period in your report.
Narratives *(final reports only)*	For final reports, there’s an option to include a brief lesson learned, success story, and photo. Where possible, encourage these sections to be completed.	This field is intended to identify opportunities for improvement. If you were starting this program over from scratch, what advice would you give yourself or others (i.e., tips to help maximize program success)? This field is intended to describe an example of a successful program outcome, to help a reader relate to the value being generated. Can you revisit this field and share a success story? Please consider uploading a photo to help a reader relate to the success story you've entered.
Custom Questions *(standard reports don’t include these)*	If the report has any custom questions included as designated by the donor, ensure that anything required has been completed.	Please complete all custom questions that are found at the end of the report.