SCATTERED DATA → ONE PERSON, ONE ID → A REPORT FUNDERS RENEW

sopact

NONPROFITS · FUNDERS · CSR & ESG TEAMS

Impact Reporting: The Complete *Best-Practice Guide.*

How to turn scattered survey data into **evidence funders trust** – the practice, the template, the build, and real reports to copy.

Unmesh Sheth · Founder & CEO, Sopact · 2026

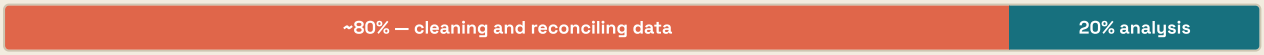
— WHO THIS IS FOR — AND WHAT YOU GET

The people who own *the proof.*

Impact reporting means proving whether your program created the change it promised — and using that proof to decide what to do next. This book is for the people who own that proof. **Find your job below; the payoff is in the right-hand column.**

YOU ARE…	YOU WALK IN ASKING	YOU WALK OUT WITH
A nonprofit or program lead	"How do I show funders it worked?"	**A 7-section template** that ships from clean data — not a 6-week year-end project
A foundation or impact investor	"How do I compare outcomes across a portfolio?"	**One indicator set** for every grantee, comparable year over year
A CSR, ESG, or sustainability lead	"How do I make GRI/CSRD disclosure useful, not just filed?"	**Continuous, audit-ready reporting** instead of the 80-page checkbox
An M&E, data, or evaluation person	"How do I join numbers and stories reliably, at scale?"	**A data-dictionary method** that computes the same way every cycle

WHERE REPORTING TIME GOES TODAY



This book is about **flipping that bar.**

HOW THIS BOOK WORKS

Chapters 1–2 give you the practice. Chapter 3 tells you honestly when a chat window is enough and when you need more. Chapter 4 gives you the template. Chapter 5 shows finished reports, step by step. Chapter 6 adapts everything to your reader — investor, corporate, or donor. Chapter 7 is your checklist. **Every page has a diagram; no page is a wall of text.**

WHY MOST REPORTS FAIL

Fix the data, *not the writing.*

Most impact reports fail for the same three reasons — and none of them are about writing. **Get the data architecture right and the report falls out of the data.**

1 · The data lived in different tools

Scores in one system, stories in another. The number and the quote never met on the same person.

2 · The work happened at year-end

The report arrived after the decision it could have helped. Too late to change anything.

3 · Nothing was repeatable

No written rules for how numbers were computed — so next year started from scratch.

ONE EVIDENCE LAYER — all three failures have the same fix. That is the whole argument of this book.

6 weeks

what a year-end report costs when the data was never connected **(Chapter 5 shows the receipt)**

minutes

what the same report costs when every record was bound to **one participant ID** from day one

— WHAT'S COVERED — AND WHERE

Seven chapters, *one method.*

CONTENTS

How to read this book: *in a hurry, read Chapter 2 and Chapter 4 — the practice and the template. Deciding on tools, read Chapter 3. Writing for a specific funder, jump to your section of Chapter 6.*

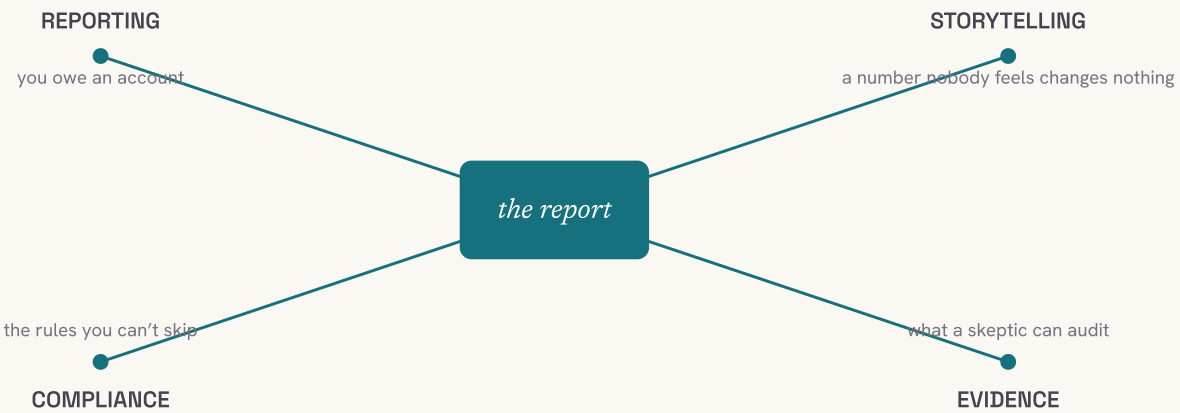
CHAPTER 01 · PAGES 04–06

The four jobs *of a report*

Every impact report has four jobs at once: report what happened, tell a human story, back every claim with evidence, and meet the rules. **Teams break their report by doing only one job well.** This chapter shows how the four fit together.

IN THIS CHAPTER

FOUR JOBS PULLING ON ONE DOCUMENT



Pull one cable too hard and the others snap.

1.1 The four jobs

WHAT PULLS ON EVERY REPORT?

Every impact report is pulled in four directions at once. **Reporting** is the duty — you owe someone an account. **Storytelling** is the human side — a number nobody feels changes no decision. **Evidence** is the spine — every claim must trace back to a record a skeptic can check. **Compliance** is the floor — the framework or disclosure rule you can't skip. A strong report does all four jobs. A weak report picks one and lets the rest slip.

WHERE EACH JOB LIVES

Most reports live in the lower-left corner — *backward-looking, numbers-only — and wonder why no one acts on them.*

1.2 What happens when you pick just one

Do only compliance and you get the checkbox report — eighty pages, filed and forgotten. Do only storytelling and you get the gala video — moving, but no one who funds at scale quite trusts it. Do only evidence and you get the methodology appendix nobody finishes. The trick is not choosing one. **It is building on a base — clean evidence tied to real people — that lets you do all four jobs from one source.**

COMPLIANCE ONLY

The Checkbox

80 pages, framework-cited, filed and forgotten.

STORYTELLING ONLY

The Gala Video

Moving — but nobody can verify it.

EVIDENCE ONLY

The Appendix

Rigorous — and nobody outside M&E finishes it.

THE BASE → FEEDS ALL THREE

Evidence tied to people

Not a fourth option — the floor the other three stand on.

1.3 The fix

> *"Story and number are not a trade-off. They are a join — on the same person, at the same moment."*

The four jobs feel like a trade-off because of how the data was stored, not because of how the report was written. When scores live in one tool and stories in another, the writer has to choose which to lead with — they were never connected. **Join them on one participant record and the choice disappears:** the number carries the story, the story cites the number, the compliance field was captured at collection, and the report comes from a query — not a six-week assembly job.

THE THREE-CLICK TEST — REMEMBER THIS THREAD

Number 71% — PAGE ONE → Cohort: 184 enrolled — WHAT IT COUNTS → Response #482 · "interview prep" — THE SOURCE

Click a number on page one → see the cohort it counts → open the response behind it. **If you can't click all three, the chain broke before the writing began.** *This thread comes back in Chapters 3, 4, and 5.*

CHAPTER 02 · PAGES 07–12

The practice that *produces the report*

The report is a thing the practice produces — like a receipt. **Fix the practice and the report stops being a crisis.** Five stages, one ladder, five questions, six principles, and a simple way to pick a framework.

IN THIS CHAPTER

2.1 The practice and the report

WHAT'S THE DIFFERENCE?

Impact reporting is the practice — explaining whether the program created the change it promised, and using that evidence to decide what to do next. **The impact report is the artifact** — usually one document per cycle. The practice runs all year; the report ships at a moment. If the practice was clean, the report falls out of the data. If it wasn't, the team spends six weeks at year-end rebuilding it.

ACCOUNTABILITY

For the funder or LP: what did the money produce?

LEARNING

For your team: what worked, what changes next cycle?

TRUST

For the public and future funders: the work in plain language.

Serve all three or it reads as compliance.

A closeout report is not an impact report — it's one grant's private record.

2.2 The five stages

The practice runs in five stages, and each stage hands the next the evidence it needs. It almost always breaks at stage three — analysis — because the data was never connected at stage two. **Give every person one ID across every form, and analysis becomes a query instead of a six-week cleanup.**

1
Define
Name the one question the report answers — from the reader's point of view.

→ the question

2
Collect
Tie every record to one participant ID; tag open text as it arrives.

→ the evidence

USUAL BREAK POINT

3
Analyze
Compare baseline to now; pair every number with a quote from the same person.

→ the pattern

4
Narrate
Write the 200-word summary first. Lead with the question. Write the failure section before the wins.

→ the argument

5
Publish
One evidence base, three versions: board, funder, community.

→ the audiences

SHARED EVIDENCE LAYER — runs under all five stages. Skip it and the report can't answer "where did this number come from?"

STAGE 2 DONE RIGHT

One ID per person, assigned at first contact and carried by every later form. Pre, post, and follow-up join on the same person automatically.

STAGE 2 SKIPPED

Three tools, three export formats, no shared key. Stage three becomes two weeks of manual matching before analysis can even start.

THE ONE-SENTENCE VERSION

Define the question → collect on one ID → compare and pair → summarize honestly → publish three cuts. **Everything else in this book is detail on these five moves.**

2.3 The ladder: output → outcome → impact

An activity report lists what you did. An impact report shows what changed — and names your part in it. Each rung needs more evidence than the one below, and most reports stop at the first. Don't skip rungs, but don't freeze either: start with the one metric that matters most and that you can measure cleanly, then climb one rung next cycle. **A solid outcome claim earns more trust than an impact claim you can't defend under questioning.**

★ IMPACT — "WHAT CHANGED, AND OUR PART IN IT"

The comparison group is what makes it an impact claim.

142 people said the workshop was the reason — that's attribution, not just movement.

+$14.2k

wage gain vs. **$4.8k** in the comparison group · 142 cited the workshop

OUTCOME — "WHAT CHANGED"

Counts the change; doesn't prove you caused it. The rung most strong reports actually stand on.

71%

earned the credential · median wage **$21.05**

OUTPUT — "WHAT WE DID"

Describes the program, not the people. Necessary — and the rung most reports never climb past.

247

trained · 18 workshops · 9 zip codes

One real workforce cohort (247 people) climbing the ladder. **Every claim ties to a participant ID, a response, and a baseline.**

2.4 The five questions a strong report answers

Every report worth the reader's time answers the same five questions. **Answer only the first two and you've written an activity log in better language. Answer all five and you earn renewal.**

1 **For whom did change happen?**

Name the cohort, not the program. Demographics come from intake — not a year-end scramble.

2 **Compared to what?**

A pre-program score, a comparison group, or a credible benchmark — collected before the program runs.

THE ACTIVITY-LOG / IMPACT-REPORT LINE RUNS HERE

3 **With what evidence?**

Every number traces to a record, a question, and a timestamp. Every quote attaches to the same person.

4 **With what confidence?**

Sample size, schedule, response rate. A 30-point gain on 12 responses is fragile; on 200 paired records it's solid.

5 **What decision does this enable?**

A finding that changes no decision is just reporting. Impact reporting ends in an action.

Test yourself: *open your last report and check off how many of the five it answers. Most teams find two.*

2.5 Six design principles

Each principle fixes one failure you've seen in real reports. They build on each other: start from the question and you naturally lead with outcomes, which forces you to tie claims to people, which gives you the evidence the rest depend on.

01 · START FROM THE QUESTION

WORKS

One sentence on page one names the question; the report answers it.

FAILS

Opens with achievements; the reader has nothing to hold onto, and skims.

02 · OUTCOMES OVER OUTPUTS

WORKS

Leads with what changed; activity counts are supporting evidence.

FAILS

Workshops held, dollars spent — the reader is left to guess what it added up to.

03 · TIE EVERY CLAIM TO A PERSON

WORKS

Each number → a participant ID, a response, a timestamp; quotes attach to the same person.

FAILS

The story file and the data file have no link; the connection lives in the writer's memory.

04 · PAIR THE NUMBER WITH THE STORY

WORKS

One number, one quote, same person — two angles on one finding.

FAILS

A single-source claim that falls apart under board questioning.

05 · SAY WHAT DIDN'T WORK

WORKS

Two pages on what underperformed and what changes next cycle.

FAILS

"Everything worked" — and the reader trusts the rest of the report less.

06 · RESPECT THE THREE-MINUTE READER

WORKS

The summary carries the whole report; everything else is appendix.

FAILS

60 pages, 30 minutes to navigate — rarely opened past the cover.

2.6 Picking a framework — by the reader, not by preference

A framework doesn't write the report. It tells you which kinds of evidence to gather, so two reports can be compared against one standard. Five frameworks dominate, and **the right one depends on who reads your report** — nothing else. One organization can run two or three in parallel on the same data.

YOUR READER	REACH FOR
A foundation board renewing a grantee	Theory of Change + outcomes
A government or institutional funder	Logic Model
A bilateral or multilateral donor (USAID, FCDO, World Bank)	Logframe
An LP comparing a portfolio	IRIS+ + Five Dimensions of Impact
A European parent corporate	CSRD / ESRS (sector layer)

BEST WHEN…

Theory of Change — the board wants to interrogate the causal path. **Logic Model** — a public funder wants inputs → activities → outputs → outcomes in one table. **Logframe** — the donor's template demands indicators with means of verification.

BEST WHEN…

IRIS+ / Five Dimensions — an LP compares many investees against shared definitions. **CSRD / ESRS** — a European corporate needs double-materiality disclosure that survives assurance.

A COMMON MISTAKE

Teams pick the framework they know, then discover their funder wanted another. **The data doesn't care:** if it was collected on one ID with clear definitions, re-mapping it to a second framework is an output step — not a new collection project. (Chapter 6 shows this per reader.)

> *"Pick by the reader. The framework is a consequence of the audience, not a personal preference."*

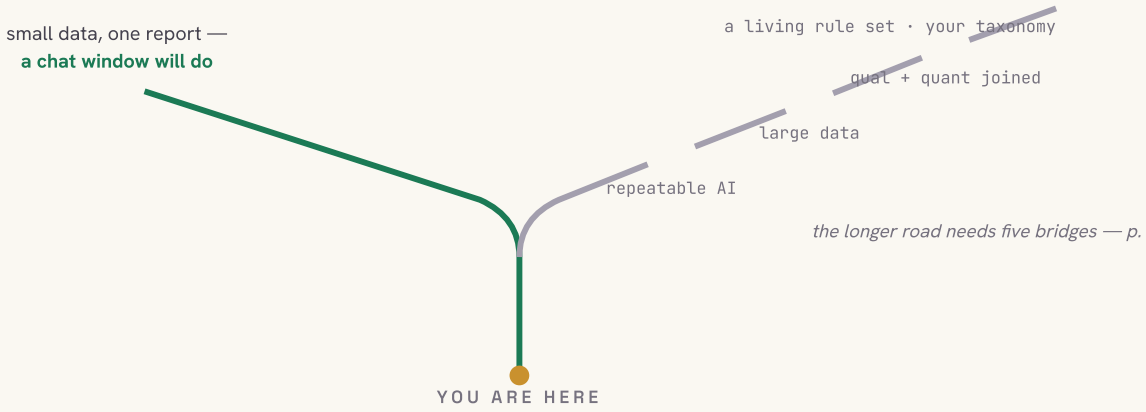
CHAPTER 03 · PAGES 13–19

How to build *an impact report*

The question is never “AI or not.” It’s which road you’re on. **For a small one-time report, ChatGPT or Claude is genuinely enough.** This chapter is honest about where that stops — and what a mission-critical setup needs instead.

IN THIS CHAPTER

TWO ROADS FROM THE SAME SPREADSHEET



3.1 When Gen AI alone is enough

AN HONEST STARTING POINT

For a small, clean, one-time report, a general-purpose AI assistant is a fine way to build. A few dozen to a couple hundred rows, one survey, one report due this week? Paste the spreadsheet into Claude or ChatGPT, ask for the summary, the themes, and a first draft — you'll save real hours. **There is no shame in this, and no reason to buy a platform for it.** Trouble starts when any of four things grows: the stakes, the volume, the mix of data types, or the number of cycles.

USE THE CHAT WINDOW WHEN…

- **One survey, one moment** — no pre/post matching needed
- **Under ~200 responses** — few enough to eyeball
- **A one-off** — you won't have to reproduce it next quarter
- **Low stakes** — no funder will audit how a number was computed
- **Mostly numbers** — only a handful of open-text answers

If all five are true: stop reading and go paste your spreadsheet. **The rest of this chapter is about what happens when they stop being true.**

A GOOD CHAT-WINDOW WORKFLOW

1· Paste data with column descriptions 2· Ask for themes with example quotes 3· Ask for a 200-word summary answering your one question 4· Check every number against the sheet yourself.

THE ONE RULE EVEN FOR SMALL REPORTS

Verify before you publish. A chat model will happily compute a percentage on the wrong denominator. You own the number, not the tool.

3.2 Five problems a chat window can't solve

As a program grows, five problems arrive — usually together. Each is survivable alone with manual effort. Together they are why "reporting takes six weeks." **Better prompting doesn't fix them, because they are data problems wearing an analysis costume.**

BREAK 1 Repeatability – can you get the same answer twice?

✓ CHAT WINDOW	✕ BREAKS WHEN…
Fast first pass; great for a one-off draft.	You paste the same spreadsheet next month and the themes, the counts, even the tone come back different. There's no fixed rule the output follows — so when a funder asks "how did you calculate this?" there is no durable answer.

A report you can't reproduce is a report you can't defend.

BREAK 2 Scale – what happens past a few hundred rows?

✓ CHAT WINDOW	✕ BREAKS WHEN…
Handles what fits in the context window and your patience.	Hundreds or thousands of responses, multiple forms, attachments. Long inputs get cut off, the model quietly drops rows, and you don't know which ones.

You can't audit a sample the tool picked for you without telling you.

WHY THE NEXT TWO ARE HARDER

Breaks 1 and 2 are about **trusting the output**. The next two are about whether the answer was even computable — joining stories to scores on the same person, and keeping the rules steady across years.

BREAK 3 The join — the score and the story must be the same person's

CHAT WINDOW

Summarizes a column of numbers; separately, summarizes a column of text.

BREAKS WHEN…

You need a 71% that carries the quote from response #482 — one record, right denominator. A chat window has no persistent participant ID, so it can't reliably match score to story across pre, post, and follow-up. It will *look* joined and not be.

The most dangerous output is the one that's confidently mismatched.

BREAK 4 The rule set — this year must compute like last year

CHAT WINDOW

Re-invents its logic from scratch on every prompt.

BREAKS WHEN…

Year-over-year trends only mean something if the rules held still: same indicators, same "divide by 208, not 285," same theme codebook. A new prompt is a new rule — and a fake trend.

Without a written, re-runnable rule set, every cycle is a fresh negotiation with the model.

BREAK 5 Your taxonomy — every organization's own language

CHAT WINDOW

Knows the generic categories — "training," "employment," "support." Fine for a generic summary.

BREAKS WHEN…

Your services run on **your own taxonomy**. A disability-employment program isn't one ladder: visual impairment, hearing impairment, and autism each take a different path to a job — and severity (low / mid / high) changes the training and workplace support each person needs. Map hundreds of qual + quant records to indicators, outputs, outcomes, and attribution in that taxonomy — then re-map them to each funder's — and manual work runs into hundreds of hours. A chat window re-learns your language from zero every session.

Your taxonomy is how you serve people — and how funders see your work. It can't live in a prompt.

All five share one shape: **the intelligence lives inside one conversation, and the report needs it to live between conversations.** *Next page: how to know when you've crossed that line.*

3.3 When you need a mission-critical approach

"Mission-critical" means: **if this number is wrong, something real happens** — a grant is lost, an audit fails, a board makes the wrong call. At that point the question stops being "can AI draft this?" and becomes "can I stand behind this number a year from now?" Count your signals below.

SIGNALS YOU'VE CROSSED THE LINE — TWO OR MORE MEANS YES

- ☐ **A funder, auditor, or board will question your numbers** — you need the same answer every time they ask
- ☐ **More than ~200 responses, or more than one form** — pre, post, follow-up, interviews, documents
- ☐ **You'll report again next quarter or next year** — trends must be real, not artifacts of a new prompt
- ☐ **Numbers and stories must connect** — the score and the quote have to come from the same person
- ☐ **Your services have their own taxonomy** — service tracks, severity levels, funder-specific indicator maps that generic categories can't hold
- ☐ **Compliance or assurance applies** — GRI, CSRD, or a donor template with means of verification
- ☐ **Decisions about people ride on it** — scholarship awards, program renewals, funding allocations

	GEN AI ALONE (CHAT WINDOW)	MISSION-CRITICAL (E.G. SOPACT SENSE)
Same answer twice?	No — each prompt re-derives the logic	Yes — written rules, re-run every cycle
Score + story, same person?	Looks joined; often isn't	Joined on a persistent participant ID
Scale	What fits in one conversation	Thousands of records, forms, documents
Your taxonomy	Generic categories, re-taught every prompt	Stored in the dictionary, applied the same way every cycle
Audit trail	None — the chat is gone	Every number → response + timestamp
Cost & setup	Free-ish, instant	A real setup step — worth it only past the line

THE HONEST RULE

Below the line, the chat window wins — faster and cheaper, and a platform would be overkill. **Above the line, the chat window doesn't just slow down; it produces answers you cannot defend.** The cost isn't the hours. It's the renewal meeting where a number falls apart.

3.4 What a mission-critical system must hold between sessions

The fix for all five break points is the same move: take the intelligence out of the conversation and put it in a standing system that remembers three things a chat window forgets the moment you close the tab.

1 · Identity

One participant ID, assigned at first contact and carried by every later form — so pre, post, and follow-up always join on the same person.

2 · Rules

A written data dictionary: what each indicator means, how it's computed (the formula **and** the theme codebook, same row), and how it's shown.

3 · Evidence

Every published number traces back to a response and a timestamp. Nothing the model "remembers" — everything it can show.

There's a fourth thing most teams underestimate. Real programs don't only collect tidy survey rows — they collect interview recordings, PDFs, essays, case notes, in many languages. A mission-critical system **reads each one as it arrives**, tags and scores it with the same dictionary as the structured data, and keeps it attached to the same person — so context builds up over years instead of being re-read from zero.

ANY INPUT → ONE RECORD → ON ARRIVAL & OVER TIME

`survey row` `interview audio` `PDF` `essay` `case note` `9 languages`

→ PARTICIPANT RECORD →

On arrival — tagged & scored the moment it lands

Over time — a 4-year line on the same record

The hard part isn't reading one document. **It's keeping every document joined to the same person, on arrival, for years.**

3.5 Where Sopact changes the outcome

Everything before this line described a category of tool, not a brand. This section is the product part — clearly labeled, so you can trust the neutral parts.

WHERE SOPACT CHANGES THE OUTCOME

Sopact Sense is the substrate built for the five break points. It assigns one participant ID at first contact and carries it across every form, survey, interview, and uploaded document. Its data dictionary computes the number *and* codes the open-text themes in one row — in your own taxonomy, across many languages — so score and story render as one block, on the same denominator, every cycle. It reads documents and transcripts on arrival. And because the rules are written once and re-run, this year computes the way last year did. **Your survey tool, your BI dashboard, and your Gen-AI drafting step all keep their jobs — they just sit on one source of truth instead of three exports.**

Survey tools	BI dashboards	General Gen-AI
Collect well; don't analyze open text; no persistent ID.	Visualize clean data; don't pair numbers with stories.	Drafts prose; not repeatable; no persistent ID.
THE GAP	THE GAP	THE GAP

▼ ▼ ▼

Sopact Sense — the layer beneath all three

persistent ID · one data dictionary (number + themes, same row) · any document on arrival · same rules every cycle

Survey tools at the collection edge, BI at the executive edge, Gen-AI at the drafting edge — one evidence layer underneath. **The tools aren't replaced. The seam between them is.**

In a chat window this thread is a hope. **In Sopact it's a click.**

CHAPTER 04 · PAGES 20–23

The reusable *template*

Seven sections, in the order strong reports use. The catch: a template that only organizes the **writing** gets rebuilt every year. A template that organizes the **data** — a data dictionary in document form — produces the same numbers every run.

IN THIS CHAPTER

4.1 What makes a template worth keeping

THE RULE

A reusable template names where each section's content comes from, how it's computed, and how it should look. That's a data dictionary. **Same data + same dictionary = same numbers, every run.**

THREE THINGS EVERY DICTIONARY ROW CARRIES

1 · MEANING

What the indicator is for

Tied to a framework pillar. If it doesn't tie to anything, it isn't computed.

2 · COMPUTATION — NUMBER *AND* THEMES, SAME ROW

```
avg(Q23 × Q24 / 3)
```

```
code(Q27) → {mentor, prep, network, confidence}
```

Across 9 languages — one rule, both halves.

3 · PRESENTATION

How it renders

Score on a dark tile, themes beneath — the same block, every report.

A survey export hands these to two analysts to figure out. **The dictionary holds them in one row — same denominator, every cycle.**

4.2 The seven sections

Each section is the result of a query against the dictionary. Name the source, the rule, and the visual — **and the section assembles itself instead of being written from a blank page.**

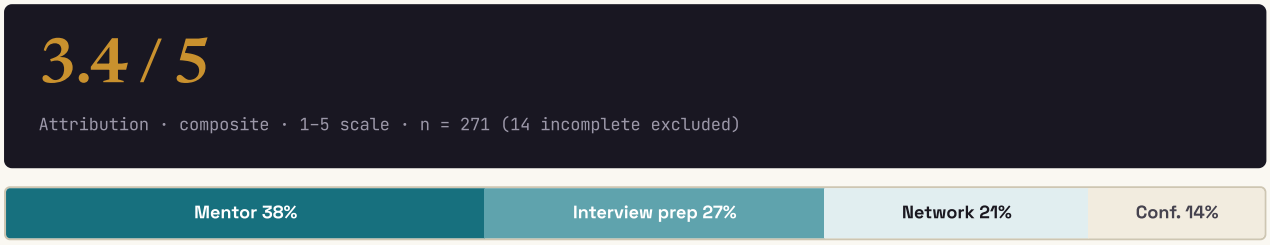
SECTION	SOURCE	RULE	VISUAL
1 · Executive summary *One page. Written last, placed first.*	Top 3–5 indicators flagged `headline=true`	One number, one finding from the stories, one forward commitment	Scorecard
2 · Who you are	Static profile	Refreshed once a year	Half page of prose + a small program map
3 · How you measured MOST OFTEN SKIPPED *The fastest way an evaluator spots a serious report.*	Collection setup: N per wave, response rate, attrition	Auto-filled from the system — never a placeholder	Methodology table
4 · What the numbers say	Responses joined on participant ID	Baseline, target, actual, variance — right denominator	5–7 metrics
5 · What the people say	Open text tagged on arrival	Two quotes per top theme, each linked to the people behind it	Theme map by frequency
6 · The charts	Roll-up queries	Colors per pillar; light fills always carry dark text	Pre-formatted charts
7 · What happens next MOST OFTEN AI-INVENTED *Turns a backward look into a forward tool.*	Variance flags + staff input	Every action gets an owner and a date	3–5 action cards

Page 26 shows this exact structure as a finished report, *with every part labeled and arrows to where each is covered in this book.*

4.3 The dictionary doing the work — one example

One indicator — **"attributed career impact"** — holds a score and the themes that drive it. The reader sees the number and the story in one block, and no analyst stitched them together.

ONE BLOCK, BOTH HALVES

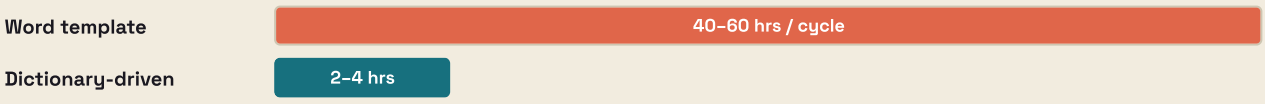


Number on top, themes underneath, rendered from one dictionary row. **That's why next cycle's report agrees with this one.**

"Can I just do this in Word?" — the honest answer

Yes — the seven sections work in Word, Google Docs, or PowerPoint, and for a one-off that's fine (Chapter 3 told you when). The cost is mechanical: every number is typed by hand, every chart is re-made each cycle, and year-over-year means reconciling separate documents. **Teams on a Word template typically spend 40–60 hours per cycle on assembly. A dictionary-driven setup cuts that to a few hours of review and framing.**

ASSEMBLY HOURS PER CYCLE



The structure is free. **The reconciliation is what costs you — every single cycle.**

WHAT TO DO THIS WEEK

Open your last report. For each section, write one line: *where did this content come from, and what rule computed it?* Anywhere you can't answer, the dictionary has a missing row. **That list is your template upgrade plan.**

4.4 One source, many versions

Most teams build a separate report for each reader, then lose weeks making the numbers agree across them. A dictionary-driven template generates every version from the same evidence base — **the numbers can't disagree, because there is only one source.**

By length

VERSION	SECTIONS USED	WHAT IT IS
One-page	§1 only	Headline metrics + one finding + one commitment
Quarterly	§1–4	3–5 pages: year-to-date plus emerging themes
Annual	All 7	10–15 pages: full method, year-over-year
Board	§1, 4, 7	The 30-minute read, with a governance ribbon

By reader – same data, different lead

READER	LEADS WITH	WHAT CHANGES
Board	Risk & renewal	Method shrinks to one line
Funder	Methodology rigor	The failure section comes before the wins
Community	People	No frameworks or sample sizes in the body

ONE SOURCE, MANY OUTPUTS. The only thing that changes is what leads.

WHY THIS MATTERS MORE THAN IT SOUNDS

When the board version says 71% and the funder version says 68%, nobody remembers why — and both readers quietly lose trust. Version drift isn't a typo problem. **It's what happens when versions are authored separately instead of filtered from one source.** Chapter 6 (p. 28) shows the same idea per audience.

CHAPTER 05 · PAGES 24–27

Real reports, *step by step*

Monday, 9:04 AM: a funder wants your report by Friday. You have 450 rows, 150 open answers to code, and exports from three tools. **This chapter shows both roads from here** — then walks one program end to end and labels every part of a finished report.

IN THIS CHAPTER

5.1 Six weeks vs. minutes

THE USUAL WAY

3 survey tools pre · mid · post, no shared ID → **Manual matching** **2 weeks** of spreadsheet work → **Consultant rebuild** coding, writing — **$18k** → **Stale PDF**

Total — 6 weeks · $18,000 · rebuilt from scratch next cycle

CLEAN ARCHITECTURE

One instrument one ID from first contact · numbers + stories in one record → **Analysis as data arrives** themes, scores, citations ready on arrival → **Live report** opens in a browser

Total — minutes · nothing rebuilt · repeatable next cycle

Report quality is decided upstream. *No editing recovers evidence the setup never captured.*

WHY THE EXAMPLES OPEN IN A BROWSER, NOT AS PDFS

A PDF freezes a moment; a live report is a window into the dataset. For a funder that means: method questions are answered by clicking into the evidence, one report serves three audiences with a filter, and next cohort's report needs no rebuild.

5.2 One program, end to end: workforce training

Here is the 247-person workforce cohort from Chapter 2, followed from the first application to the final report. **Every step feeds the next, and everything lands on the same participant ID** — which is why the report at the end takes minutes, not weeks.

1

Applications — reviewed in minutes

Each application gets an AI brief with citations to the applicant's own sentences. The panel sorts a full grid, not a paper pile.

`ID assigned here · 15→3 min per app`

2

Interview

Recorded, transcribed, and themed on arrival — attached to the same ID as the application.

`themes ready before the debrief`

3

Learning goals at intake

Interview themes become each person's learning goals — the targets the program will be measured against.

`goals = the report's yardstick`

4

Pre survey (baseline)

Skills and confidence measured before training starts — the "compared to what?" from p. 10, captured on time.

`baseline locked`

↳ training runs · attendance and case notes land on the same IDs

5

Post survey

Same questions as pre, same IDs — so every delta is a real pair, not an average of strangers.

`+0.94 mean skill delta`

6

Causality check

Compare against the group that didn't complete; ask participants what drove the change. 142 cite the workshop.

`+$14.2k vs $4.8k comparison`

7

Impact report

The seven sections from Chapter 4 fill themselves from the six steps above. Next page shows it labeled.

`minutes — see p. 26`

ONE PARTICIPANT ID, START TO FINISH — application · interview · goals · pre · post · causality · report. Break the ID anywhere and steps 5–7 become manual matching.

WHAT TO COPY

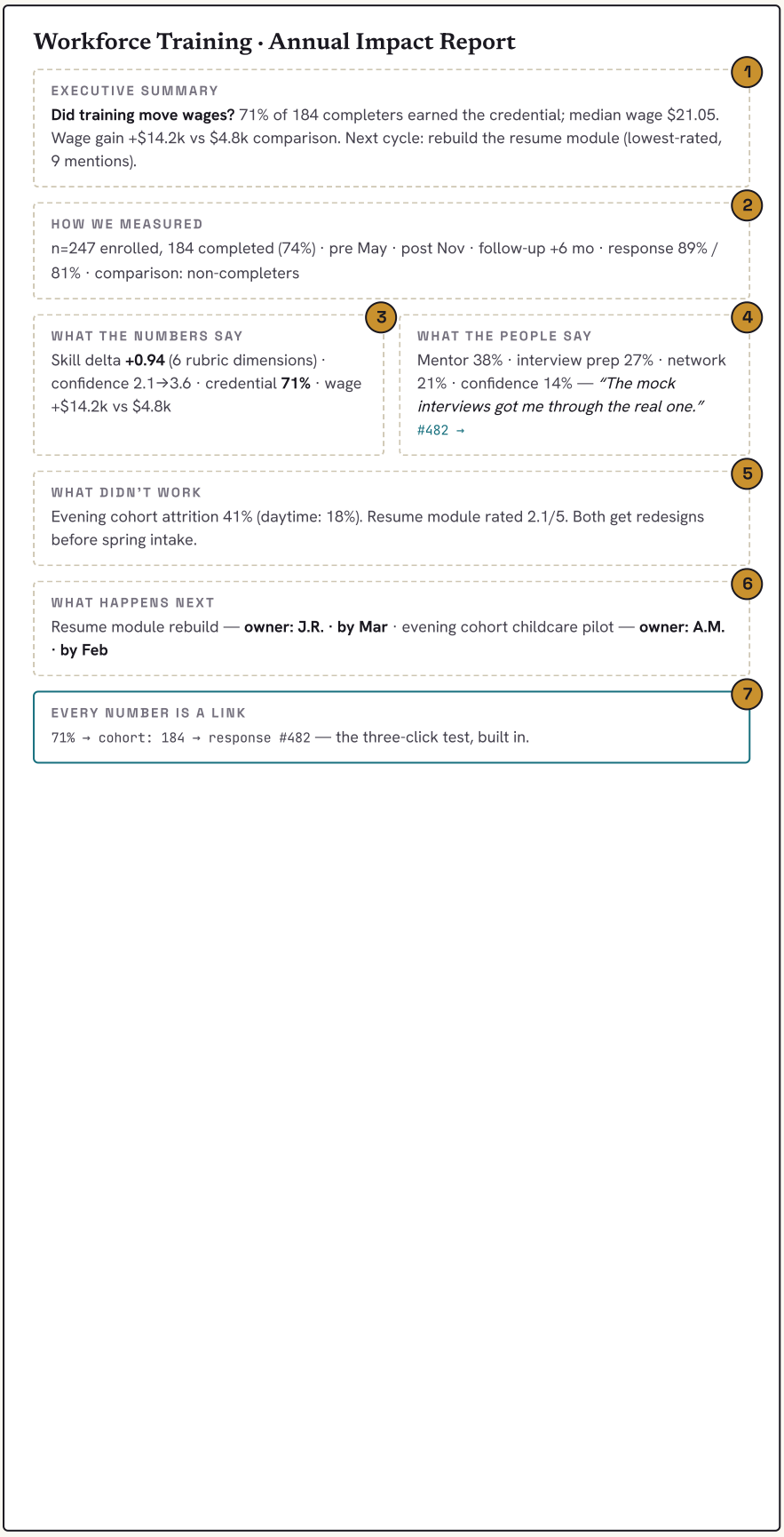
Whatever your field, the spine is the same: **select → listen → set goals → baseline → measure again → check cause → report.** Swap "interview" for "site visit" or "diligence call" and it's your program.

71%

earned the credential — and because every step shares one ID, that number **carries its own evidence**

5.3 The report, with every part labeled

This is the workforce report from the last page, laid out as one page. **Every numbered label points to where this book covers that part** — so you can build yours section by section.



1. **Summary written last, placed first.** One question, one number, one commitment.
   → template §1 · p. 21 · principle 06, p. 11
2. **Method up front, auto-filled.** N, waves, response rate — how evaluators spot a serious report.
   → template §3 · p. 21 · question 4, p. 10
3. **Outcomes, not activity.** Baseline vs. now, right denominator.
   → the ladder, p. 09 · template §4, p. 21
4. **Number and story, same person.** The quote cites the record behind it.
   → principle 04, p. 11 · worked row, p. 22
5. **The failure section** — written before the wins. It buys trust for everything else.
   → principle 05, p. 11
6. **Actions with owners and dates.** A report that ends in decisions, not adjectives.
   → template §7 · p. 21 · question 5, p. 10
7. **The citation thread.** Number → cohort → source, clickable.
   → the fix, p. 06 · three checks, p. 27

5.4 Four real reports you can copy

Four finished reports from four very different programs. **Find the one closest to your situation and copy its format** — each opens live, in a browser, without a login.

1 · PRE/POST TRAINING

Girls Code cohort — for a foundation funder

Skill change across 6 rubric dimensions, confidence movement, demographics from intake, themes ranked by frequency.

sense.sopact.com/ig/d81465e6… **+0.94** skill delta

2 · NUMBERS × STORIES

Test scores vs. confidence — for program improvement

Rubric scores correlated with AI-read confidence, person-level scatter (not just averages), four clusters, plain-language takeaways.

sense.sopact.com/ig/81461672… **r = 0.71**

3 · APPLICATION REVIEW

500 scholarship applications — for a review panel

A one-page AI brief per applicant with citations to the source sentence, a sortable panel grid, flagged outliers.

sense.sopact.com/ig/bcc5a5a7… **15→3** min/app

4 · DOCUMENT INTELLIGENCE

Sustainability PDFs → one dashboard — for investors & board

PDFs read automatically — scores, gaps, and claims per company — with evidence citations and one cross-portfolio view.

sense.sopact.com/ir/1a2dccdb… **62%** portfolio avg

THREE CHECKS BEFORE YOU TRUST ANY REPORT — YOURS OR THEIRS

1 · Drill down. Can a finding open the responses it counts? "+40% confidence" with no people behind it is a warning sign.

2 · Cited themes. A theme is credible only if you can open a response that contributed to it.

3 · Method inside. Sample size, response rate, and dates in the report itself — not a separate file.

> *"Reports this clean come from how the data was collected — not from formatting at the end."*

CHAPTER 06 · PAGES 28–31

Your reader *changes the report*

Everything so far is one method. But an impact investor, a CSR team, and a donor read for different things — so the same evidence gets framed three ways. **This chapter is about what each reader uniquely needs, and what stays the same underneath.** The data is collected once.

SAME CORE, THREE FRAMINGS

- **Investor** — comparability across a portfolio
- **CSR / ESG** — continuity and assurance
- **Donor** — one person's story, over years

6.1 Impact investing — comparability across a portfolio

An LP or foundation board doesn't read one program — it compares many. So this reader's whole game is **comparability**: the same indicators, applied the same way, across every grantee and every year. The classic failure: forty grantees reporting in forty formats, with no link between what they promised at application and what they report at year-end. **The fix: make the application rubric the baseline, and each monitoring cycle the comparison — on the same entity ID.**

THE PORTFOLIO ROLL-UP THIS READER WANTS

COMPANY	JOBS	WAGE Δ	REACH	RISK
Alpha Works	74	68	81	55
Bright Path	61	59	66	71
Cedar Labs	52	64	49	58
... 37 more, same columns, same definitions				

62%

portfolio average — **one indicator set**, every entity, every year

Per-cell completeness check: What · Who · How Much · Contribution · Risk

Before: 40 grantees, 40 templates — aggregation is apples to spreadsheets.

→

After: one indicator set, one entity ID, application → monitoring on the same record.

WHAT'S UNIQUE TO THIS READER

Frameworks: **IRIS+** for shared definitions, **Five Dimensions** to stress-test each claim. Cadence: quarterly monitoring against application commitments. The deal-breaker question: **"can I compare this grantee to that one, and this year to last year?"** If the answer is no, nothing else in the report matters.

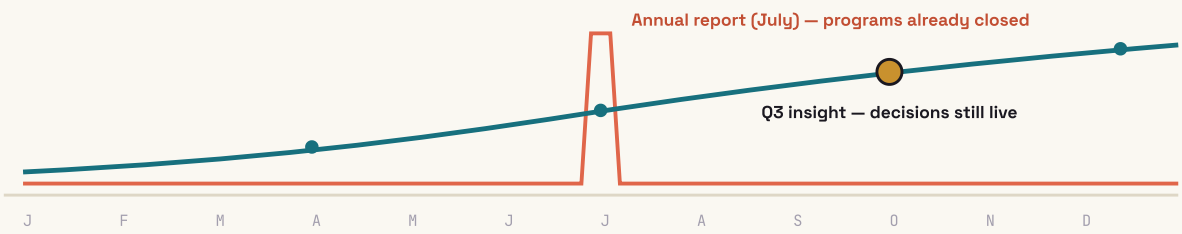
WHERE SOPACT CHANGES THE OUTCOME

Application rubric scores become the monitoring baseline automatically; quarterly forms pre-fill with each grantee's own commitments as targets; a dashboard flags **commitment drift** in Q2 — where the narrative diverges from the application's theory of change — long before the annual report is assembled.

6.2 CSR / ESG — from the checkbox report to continuous disclosure

This reader's enemies are **timing and assurance**. The classic failure is the checkbox report: eighty pages, GRI-cited, arriving in July for programs that ran in Q1 — changing nothing, because the budget already closed. Two forces make that untenable now: regulators (CSRD double materiality, ISSB IFRS S1/S2, SEC climate rules) demand audit-grade evidence trails, and decisions need intelligence **while programs can still be adjusted.**

RETROFIT VS. CONTINUOUS — ONE 12-MONTH TIMELINE



Board-facing intelligence in Q3 beats polished narrative next July.

SIX RULES THAT MAKE ONE DATASET FEED MANY FRAMEWORKS

IDs at first contact · Disaggregation at collection · Instruments aligned to GRI/SASB/CSRD at setup · Open text coded at scale · Publish continuously · Audit-grade trail

Architecture decisions happen at collection; framework decisions happen at output. **One dataset, many frameworks.**

An honest sizing note: with fewer than ~3 active CSR programs and under ~500 stakeholders, a well-kept spreadsheet with consistent IDs may serve until complexity grows.

— WHERE SOPACT CHANGES THE OUTCOME

Persistent stakeholder IDs across employees, community participants, and grantees; themes coded as data arrives; multi-framework output (GRI + SASB + CSRD + custom) from one dataset; every published metric traceable to a stakeholder record, a collection date, and an instrument version — **the difference between passing and failing assurance.**

6.3 Nonprofit / donor — one person's story, over years

A donor reads for two things an LP doesn't weight as heavily: **a person they can hold in mind, and continuity.** The strongest donor reports do five things from one cohort dataset — and youth programs have a structural advantage: students stay for years, so four annual reports become one trajectory chart, *if the participant ID never changes.*

FIVE CONNECTED DONOR REPORTS — ONE STUDENT ID UNDERNEATH

1 · Reach	2 · Growth	3 · Story + score	4 · Journey	5 · Your gift
1,517 enrolled · 4 schools · 87% returning	**+1.2 mean delta** · confidence, resilience, social	One student: quote + **2→4** + themes + source	**2.0 → 3.8** over 4 years vs. cohort mean	"Your $25,000 · School A · 38 students · **+1.3**"

`student_id` — the rail all five run on. **Five filtered views of one dataset — not five writing projects.**

STORY MEETS SCORE — STUDENT_482

confidence 2→4 · resilience 2→3 · social 1→3

"At the start of the year I was scared to talk in class. By term 3 I read a poem at assembly. My grandmother came to watch."

`themes: public-speaking · family-witness · caseworker-support  ↳ source: REFL_482 · consent: share-externally`

WHERE SOPACT CHANGES THE OUTCOME

One student ID from first enrollment carries across every form and school year — **the journey chart is a property of the data, not an analyst project.** Reflections are transcribed and themed on arrival, with a consent flag controlling what each donor sees. The personal cut is one live URL per donor, filtered from the same reports — and it feeds your CRM and stewardship workflow rather than replacing them.

> *"Investor, corporate, donor — the framing changes, the architecture doesn't. Collect once, on one ID, and every reader's report is a filtered view."*

CHAPTER 07 · PAGES 32–33

Make it *a habit*

You don't fix impact reporting at year-end. **You fix it at intake.** Here's the short list that turns next cycle's report from a project into a byproduct — and a ladder to find where you stand today.

7.1 The next-cycle checklist

ARCHITECTURE — DO THIS FIRST

- ☐ One **persistent participant ID**, assigned at first contact, inherited by every later form
- ☐ **Demographics captured at collection** — not retrofitted from exports at year-end
- ☐ **Open text themed on arrival**, attached to the same record as the score

METHOD

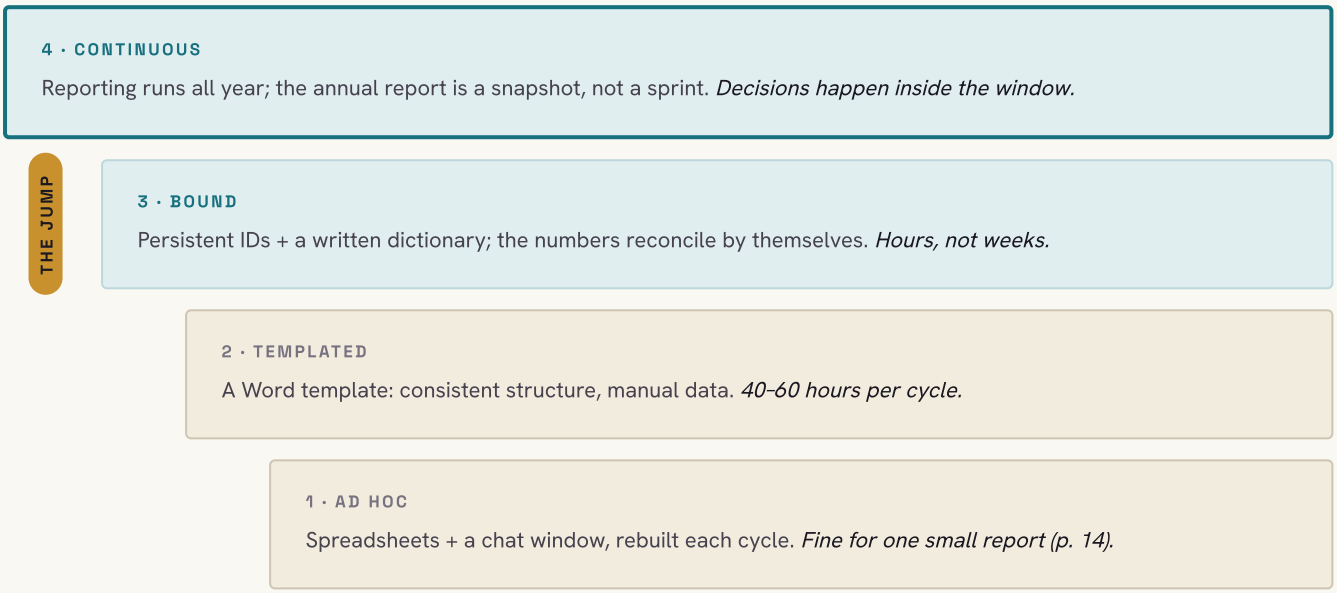
- ☐ A **written data dictionary**: each indicator's meaning, computation (number + themes), and presentation
- ☐ **Baseline collected before the program runs** — "compared to what?" answered on time
- ☐ The **right denominator declared per indicator** — not "divide by the full sample"

REPORT

- ☐ **Executive summary written last**: headline finding + one-line method + one forward commitment
- ☐ A **failure section**, written before the success section
- ☐ The **three-click test** passes: number → cohort → source response

Print this page. *Nine boxes; most teams start with two checked. Each box you add removes a week from next year's report.*

7.2 A maturity ladder — where are you now?



The 2 → 3 jump — binding identity and writing the dictionary — **is the one that matters most.**

7.3 Close

> *"Make the report the byproduct of clean data — not a project of its own."*

The strongest reports come from data that was bound at intake: one ID across every form, open answers themed as they arrive, one source feeding the board version, the funder version, and the community version with nothing to reconcile. **Get the architecture right and storytelling, evidence, and compliance stop competing — they all run off the same source.**

KEEP GOING

Get the framework guide | See the live samples | Book a working session

Built on Sopact Sense — persistent IDs, one data dictionary, any document on arrival, same rules every cycle.

KEEP GOING — THE SOPACT INTELLIGENCE EBOOK SERIES

Each book is one reader's cut *of the same method.*

Start with the one whose reader is yours.

Impact Intelligence: For Funds & Foundations

Portfolio comparability, IRIS+, the LP-facing cut.

ESG Intelligence: Diligence to Supply Chain

CSRD / GRI / SASB disclosure as a continuous practice.

Grant Intelligence: From Award to Outcome

The funder-facing report, award through closeout.

Application Intelligence: Grants & Scholarships

Review at scale, with citations a panel can audit.

Program Intelligence: From Fragmented Data

Joining scattered tools into one evidence layer.

Learning Intelligence: Training & Workforce

Pre/post, Kirkpatrick levels, skill deltas.

Case Intelligence: Beyond Case Management

Longitudinal client records that compound.

AI Data Design Guide: Context, Data & Prompts

The no-code companion: context, data, questions, and prompts in an AI-native system.