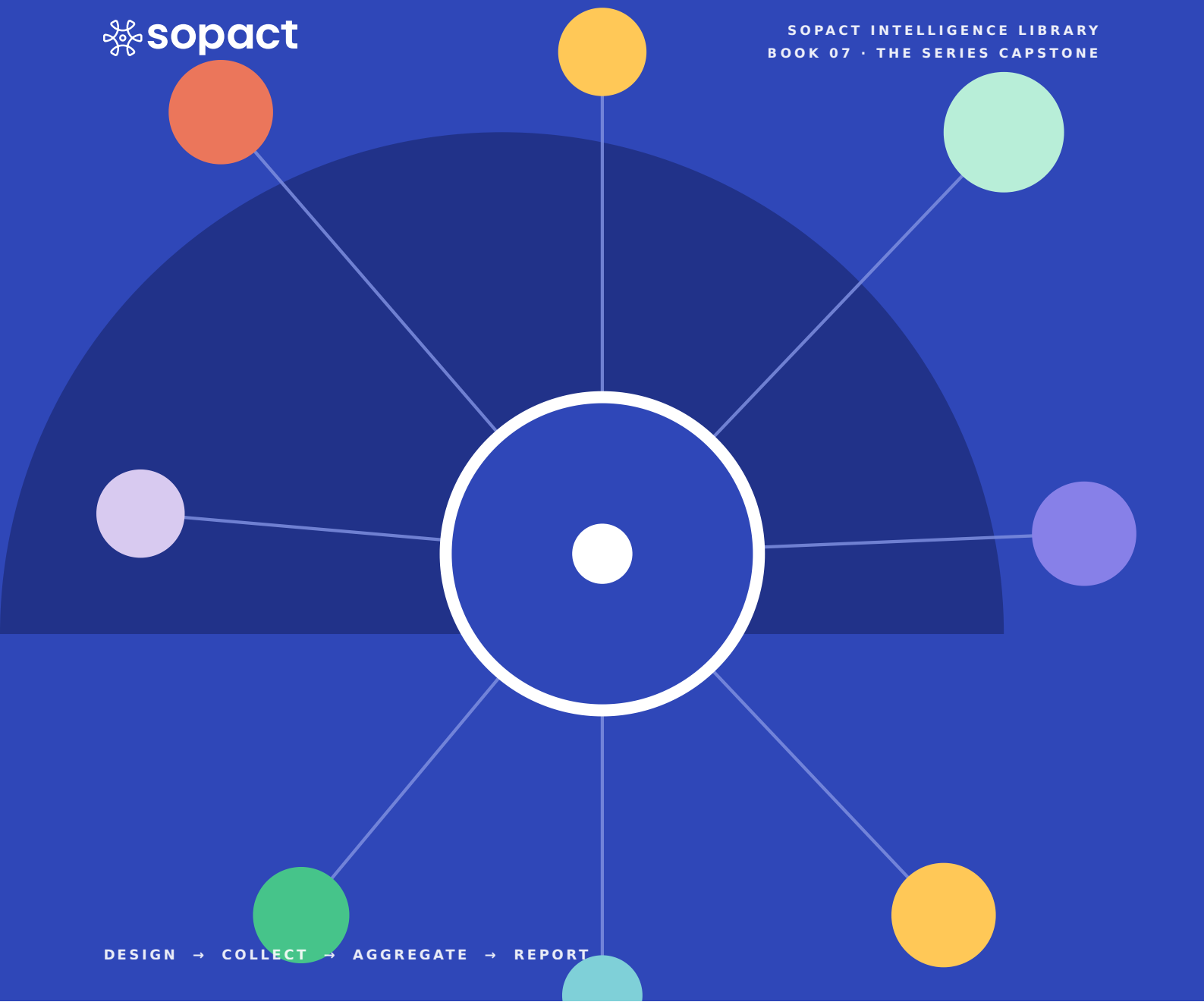

sopact

THE WHOLE SPINE · 4 CHAPTERS · 21 SECTIONS

FROM FRAGMENTED DATA TO PROGRAM INTELLIGENCE.

BOOK 07

Unmesh Sheth · Founder & CEO, Sopact · 2026

sopact.com

CONTENTS

What's inside.

The series capstone. Where the other six guides each take one slice of the work, this one runs the whole spine for a multi-program organization — **design** the framework, **collect** across every program and chapter, **aggregate** onto one record, and **report** to each funder in the framework they asked for.

DESIGN → COLLECT → AGGREGATE → REPORT

PURPOSE · WHO THIS IS FOR

For the organization that runs many programs and answers to many funders.

If you run four to twelve programs — or a federation of chapters and members — each with its own logic model, its own funder, and its own reporting cadence, this guide is for you. The hard part was never any single program. It was standardizing collection across all of them and rolling it up without rebuilding the data every cycle.

Traditional impact measurement, in its old form, is finished: it was the funder's ask and the grantee's burden, and the survey returned 5% of the context while case notes, documents, financials, and stories held the other 95% — disconnected. Program intelligence is the whole spine on one connected record per person, so the same data answers every funder in the framework they require.

1

Design

A living framework and data dictionary, built from your own interviews.

2

Collect

Online, offline, documents, 40+ languages — standardized across every chapter.

3

Aggregate

One participant ID; Cell to Grid roll-up across programs and members.

4

Report

Each funder's framework, generated from the same record, every figure cited.

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This is the spine beneath the whole library

Grant, application, ESG, impact, and learning intelligence are each one slice of this. Program intelligence is the architecture they all sit on — one connected record per person, across every program and every cycle.

CHAPTER ONE · THE REFRAME

A decade of measuring outputs as if they were outcomes.

Sessions delivered, students served, encounters documented — activity is easy to count. Whether a participant actually improved is the question funders and boards now ask, and it lives in the 95% of context the dashboard never reached.

THE REFRAME

“We served 1,500 people” is not an outcome.

An output is what the program did — sessions delivered, students served, encounters logged. An outcome is what changed for the participant — confidence improved, employment found, well-being moved. For a decade the tooling counted the first and called it the second.

TWO LEGACY ASSETS, NOW LIABILITIES **Activity tracking + consulting**	WHAT REPLACES THEM **One connected record**
Case-management platforms counted attendance and documentation, not movement on outcomes.	**Outputs become outcomes become evidence** — movement, on the same record.
Capacity-building consultants left; the report became the deliverable, the data never connected to the diagram.	**The connected record is the product** — the team runs it after one session.
Case notes sat in unsearchable narrative fields and never reached the dashboard.	**The reasoning layer reads the case note** as evidence, not decoration.

A board could always ask “did they improve?”

And the answer was a slide and a story, never one connected record. The shift of the last two years is that AI can finally read the qualitative material and tie it to a participant identity — but only if that identity was designed into the architecture from the start.

THE 95% THE DASHBOARD MISSES

The survey is 5%. The record is the other 95%.

The survey returns roughly 5% of the available context. The remaining 95% — case notes, transcripts, audio reflections, financials, parent and beneficiary voice — lives in stores that almost never connect to the survey. One connected record per person brings both onto the same row.

LONGITUDINAL

The student enrolled at age 7 is the same record at 17; the grantee at year 1 is the same at year 5. The ID survives redesigns, turnover, and migrations.

NUMBERS + STORIES

Before-and-after scores sit on the same record as case notes, transcripts, and program cost — read together, not in two workstreams.

EVERY FIGURE CITED

Every number in a funder report links to the specific case note, transcript, response, or ledger entry it came from — verifiable in one click, not one quarter.

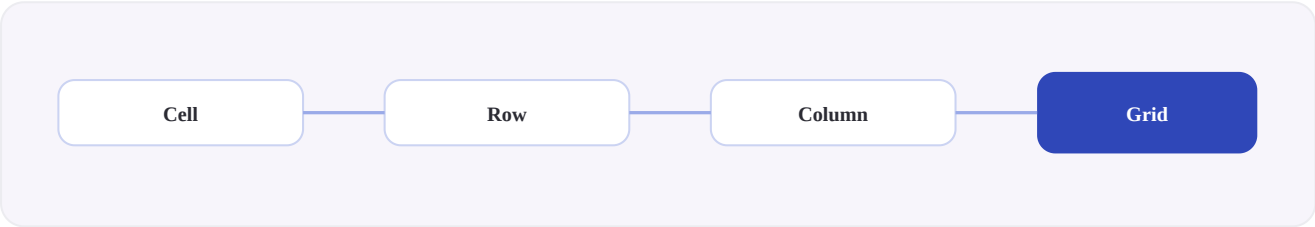
Sopact's one bet, since 2014

One stable participant ID across application, case note, survey, story, audio reflection, and ledger entry. The connected record is the product; every dashboard, funder report, and board view sits on top of it — not another dashboard bolted onto disconnected tools.

THE ANATOMY OF A ROLL-UP

From one response to the whole portfolio.

Every figure on a funder report descends from a single response written by a single participant. Naming the four layers keeps the question — and the citation trail — from getting lost between the cell and the board deck.



01 · CELL

One response: a survey answer, a case-note line, a ledger entry. The atomic, cited unit.

02 · ROW

One participant across all sources and stages — the longitudinal view of one human.

03 · COLUMN

One outcome across a cohort — pre→post movement, theme distribution, retention.

04 · GRID

All cohorts, all programs — the portfolio view, aligned to whatever framework a funder asks for.

DESIGN · BEFORE A SINGLE SURVEY GOES OUT

Build the logic model from a conversation, not a consultant workshop.

Traditional M&E starts with a logframe disconnected from the data. Standardization starts earlier: one framework and one data dictionary, agreed across every program and chapter before collection begins.

THEORY OF CHANGE + DATA DICTIONARY

A living theory of change, drafted from your own words.

Upload an interview transcript, a program description, or existing documents, and the framework — logic model, theory of change, logframe — is generated, indicators mapped, and a shared data dictionary created. Your team and your partners align on what gets measured before the first survey goes out.

1

Theory of Change

The named link between what the program does and what changes — a living model, not a slide that goes stale.

2

Data dictionary

Field by field: definition, unit, source, evidence requirement — so two programs measuring the same outcome measure it the same way.

3

Indicator mapping

Each indicator bound to the framework — the scoring template every later response is read against.

∞

The framework becomes the scoring template

Once the theory of change is structured rather than drawn, every survey response, case note, and document is read against it automatically — and drift surfaces instead of hiding. Co-developed as Actionable Impact Measurement with Melbourne Business School; used by 30,000+ practitioners.

MANY CHAPTERS, ONE STANDARD

Centralize collection so every chapter reports the same way.

A federation, association, or multi-site network has the same problem at a larger scale: every chapter or member collects differently, so nothing rolls up. Standardization is an architecture decision — one shared framework, one data dictionary, one ID scheme — agreed centrally, run locally.

CENTRAL · THE STANDARD

The national or umbrella body defines the framework, indicators, and dictionary once — the shared vocabulary every chapter measures against.

LOCAL · THE COLLECTION

Each chapter or member collects in its own language and context, on the shared instruments — no chapter has to invent its own.

UP · THE AGGREGATION

Because every chapter used the same dictionary and ID scheme, the national roll-up is a query — not a reconciliation project per member.

→ **Each program keeps its own outcomes**

Standardization is not one rigid data model forced on everyone. Each program or chapter binds its own outcomes to the same connected record — the umbrella view rolls them up without flattening what makes each program distinct.

SURVEYS, DOCUMENTS, INTERVIEWS, OFFLINE

Collect in Swahili. Analyze in English. Report in Portuguese.

Field teams collect in local language, online or offline. Sopact translates, codes, and themes automatically, and reports generate in whatever language the funder needs — collection, analysis, and reporting across 40+ languages, with no translation bottleneck and no two teams translating the same data twice.

ONLINE

Pre, mid, post surveys — one persistent ID across every round.

OFFLINE

KoboToolbox / ODK submissions imported, IDs mapped on arrival.

DOCUMENTS

Partner PDFs, financials, 100+ page reports read end-to-end.

VOICE

Interview and audio-reflection transcripts, coded as evidence.

✓ **Your systems stay intact**

Sopact reads from Airtable, Salesforce NPSP, Bonterra Apricot, HubSpot, KoboToolbox, and Google Drive via MCP, API, Zapier, or direct import — it connects, it doesn't replace. No new software for field teams, no rip-and-replace.

AGGREGATE · ONE RECORD PER PERSON

No VLOOKUP. No “which John Smith is this?”

Every participant gets a persistent unique ID the moment they enter the system. Every survey, transcript, document, and offline record links to it automatically — so the 80% of staff time that went to reconciliation goes to learning instead.

THE 80% CLEANUP TAX, REMOVED

Data arrives clean because the architecture prevents fragmentation.

The cleanup tax is not bad luck; it is the predictable cost of four tools issuing four IDs. Mint one persistent ID at first contact and every later join — pre, mid, post, transcript, document, ledger — happens automatically. There is no “prepare data for the report” step because the data was never separated.

80%
of staff time on cleanup — before

0
manual reconciliation between systems — unique IDs do it

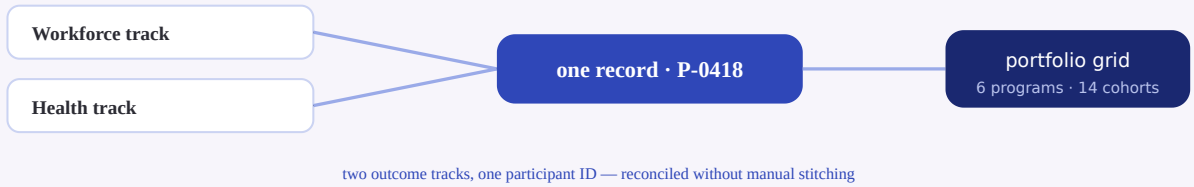
4 min
to code 1,000 qualitative responses — was 3 months of consultant time

> “I added two more trial prompts to the project, and I am absolutely astonished at what the system can do — and I’ve only just started.”
>
> — MARCO BOTHA, CEO, OPEN PLAY FOUNDATION

DIFFERENT OUTCOMES, ONE CONNECTED RECORD

One person in two programs is one record.

A mid-sized nonprofit runs four to twelve programs, each with its own logic model and funder cadence. Sopact binds each program's outcomes to the same connected record per participant — without forcing one data model on every program. The board view rolls them up without manual stitching.



two outcome tracks, one participant ID — reconciled without manual stitching

Bring in the years already in spreadsheets

Historical participant lists, old survey exports, scanned intake forms, and even past funder reports are read in and joined to a participant identity. Most organizations discover their existing data already supports the outcome claim they have been making — it was just never connected.

NOT THE YEAR-END DASHBOARD

The real job is the Tuesday question.

The legacy stack was tuned for the year-end report. The impact manager’s actual job is the question that lands on a Tuesday — a program officer asking what happened with this cohort, a board chair asking what the case notes say, a funder asking which outcome moved.

LEGACY STACK **Three systems, four weeks**	PROGRAM INTELLIGENCE **One query, with citations**
“Did the cohort improve, or did we only track who showed up?” — pull from three tools, hire a Q4 consultant.	**47 enrolled, 83% retention, confidence +2.3 pts,** 12 case-note themes — cited.
“What do the case notes say the survey misses?” — the board hears one anecdote.	**The pattern across 40 cases** surfaces, with the source note behind each.
“Who is still moving at 6 months, and what do the dropouts share?” — re-key the cohort, 12 reply.	**Longitudinal on one ID** — two shared dropout themes the program design missed.

→ **Drift flagged before the cohort review**

The reasoning layer flags the participant whose case notes diverge from their survey responses — the one who says “fine” on the form but reads as withdrawn in the notes — for the caseworker, while there is still time to act.

REPORT · ONE RECORD, MANY FUNDERS

Each funder wants a different framework. The data is the same.

Your theory of change, a funder’s custom outcome framework, a portfolio-wide standard, the question set a regulator wants — all bind to the same connected record. The report writer’s job becomes interpretation, not data assembly.

REFERENCED, NOT RE-KEYED

Report to each funder in the framework they agreed to.

A multi-program organization rarely has one funder, and funders rarely agree on a framework. The mistake is maintaining a parallel spreadsheet per funder. The fix is one connected record that every framework reads from — so the same participant data feeds the funder-specific report and the board view at once.

FUNDER A

Wants a custom logic model and outcome set. **Bound** to the record; report references it, not a re-typed copy.

FUNDER B

Wants a portfolio-wide standard (IRIS+, SDG alignment). **Bound** to the same record, computed as a query.

THE BOARD

Wants movement, cost-per-outcome, and the stories behind both — from the **same** source data.

THE REGULATOR

Wants a defensible, auditable trail — **every figure one click** from its source record.

✓ **Six weeks to six hours**

No spreadsheet-per-funder, no reconciliation by participant name, no copy-paste into a Word template. Each funder's framework is a different narrative over the same connected record — produced, not reassembled, every cycle.

GENERATED FROM ONE UNIFIED RECORD

Six reports, every program, every cycle.

When collection is standardized and aggregated onto one record, the reports fall out as queries — metrics and qualitative themes unified, every figure cited to its source.

PROGRAM IMPACT REPORT

Full theory-of-change update — what changed, who, how much, contribution, risk — aligned to your logframe.

MISSING-DATA ALERT

Which partners haven't submitted, which fields are incomplete — flagged the day data is due.

OUTCOME-VARIANCE REPORT

Programs tracking below committed outcomes, root cause extracted from the qualitative data.

QUALITATIVE-THEMES REPORT

AI-coded open-ends — what 1,000 people actually said, synthesized in minutes, cross-tabbed by demographic.

EARLY-WARNING REPORT

Dropout signals and partner-performance flags — surfaced as data arrives, not at year-end.

PARTNER + BOARD SUMMARY

Executive narrative for the board deck, the funder packet, and individual partner feedback — in any language.

WHY AI ON OLD SYSTEMS QUIETLY FAILS

Run it twice; get the same answer with citations.

You can prompt your way to a one-cohort summary with a foundation model. The trouble shows up in production: ask the same question twice and you get two answers — that is how the models work, not a bug to fix. And as the dataset grows, fabrication climbs.

The loudest pattern in the category — and the one that stops working

On a 2026 enterprise-document benchmark, every major reasoning model fabricated information in more than 10% of summaries. AI bolted on top of Apricot, ETO, SureImpact, Blackbaud, or Salesforce NPSP inherits their disconnection. The fix is not a better prompt; it is structural.

SAME ID, YEAR 1 TO YEAR 5

A stable participant identity that never breaks across redesigns or migrations.

DETERMINISTIC JOINS

Case-note PDFs, survey responses, and cost data joined the same way every run.

CITATION BEHIND EVERY FIGURE

Each roll-up names the record it came from — the reasoning layer runs on top of structure, not in place of it.

ONE SPINE, SEVEN GUIDES

Every guide in this library sits on one spine.

Grant, application, ESG, impact, and learning intelligence each take one slice of the work. Underneath every one of them is the same architecture this book describes: one connected record per stakeholder, standardized collection, evidence that compounds, and a report generated — not assembled.

Book 01	**Beyond Case Management**	the foundation
Book 02	**Application Intelligence**	review & bias
Book 03	**Grant Intelligence**	award to outcome
Book 04	**ESG Intelligence**	risk to supplier
Book 05	**Impact Intelligence**	read to exchange
Book 06	**Learning Intelligence**	pre to post
Book 07	**Program Intelligence — the whole spine**	you are here

The engine underneath all of it

Stakeholder intelligence — one persistent record per person or organization — is the engine. Each guide is that engine pointed at a different program shape. Standardize once, and the whole library is a single system, not seven tools.

BRING ONE PROGRAM

Leave with the citation trail behind every number.

Drop us one program’s data — a survey export, a partner report, a beneficiary transcript, whatever you have. Sopact reads it, builds a theory of change, codes the qualitative data, and shows the intelligence it would generate across your full portfolio — no setup, no implementation, no waiting.

SOPACT · PROGRAM INTELLIGENCE

Standardize collection once. Report to every funder. Prove the outcome.

One connected record per person, across every program and chapter — design the framework, collect anything, aggregate without reconciliation, and generate each funder’s report from the same evidence. Most teams have their first cohort report in under a month.

See it with your data → **sopact.com**

Impact Measurement · Nonprofit Program Intelligence · Multi-Program Roll-up · Sopact Sense