



# Introduction to Social Impact Reporting

# Our Team



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# Our Approach

What are the benefits to funders?



## **Communicating Impact**

- Standardized indicators
- Best available data
- Claim of impact



## **More Support**

# Our Approach

What are the benefits to nonprofits?



## **Comprehensive and Concise**

- Use logic model template to forecast and report to your end outcomes using best available data



## **Credible and Shareable**

- Share success stories and lessons learned
- Share with other stakeholders



## **Simple and Supported**

- Step-by-step guidance, custom feedback, and easy cloning

# Reporting Sections

Consider time blocking each section to keep your reporting to a two hour effort.


<b>Overview</b>	Name, description, start/end date of report, logo, and report stage. <i>If relevant, refer to funder-specific guidelines regarding what type of report to create.</i>
<b>Intervention</b>	Social category, type of intervention, frequency and duration of engagement, and description (text).
<b>Beneficiaries</b>	Location, demographic categories (%), description (text). <i>Where possible, please provide gender, ethnicity, social and economic status percentages.</i>
<b>Outcomes</b>	Logic model template, relevant indicators, indicator customization, backup documentation, notes. <i>If relevant, refer to funder-specific guidance on logic model templates.</i>
<b>Budget</b>	Direct (cash, in-kind) and overhead (cash, in-kind), backup documentation, notes.
<b>Narrative</b>	Success stories, lessons learned (final report only).

Overview   Impact Model   Narrative   Finances
👍 Ratings   🖨️

Of the donors supporting this program, display Impact Receipt for:

TEST ORG (\$500,000.00) ▾

## Teaching for Equity and Justice



We engage young people in deep civic learning by providing challenging content through a process that builds knowledge, skills, and dispositions. Our classes integrate the study of history and literature with ethical decision-making and innovative teaching strategies.

**Location:**  
Chicago, IL, USA; Boston, MA, USA; Oakland, CA, USA; Dallas, TX, USA; Detroit, MI, USA; New York, NY, USA

**Content updates:**

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Jun 30, 2021  
Program start

Jun 30, 2022  
Program end

**Impact Receipt®** for...  
**TEST ORG**

Investment:  
\$500,000.00

Report Stage:  
Initial

Last Updated:  
08 Oct 2021

**Portion Funded**  
**71%**  
of total cost

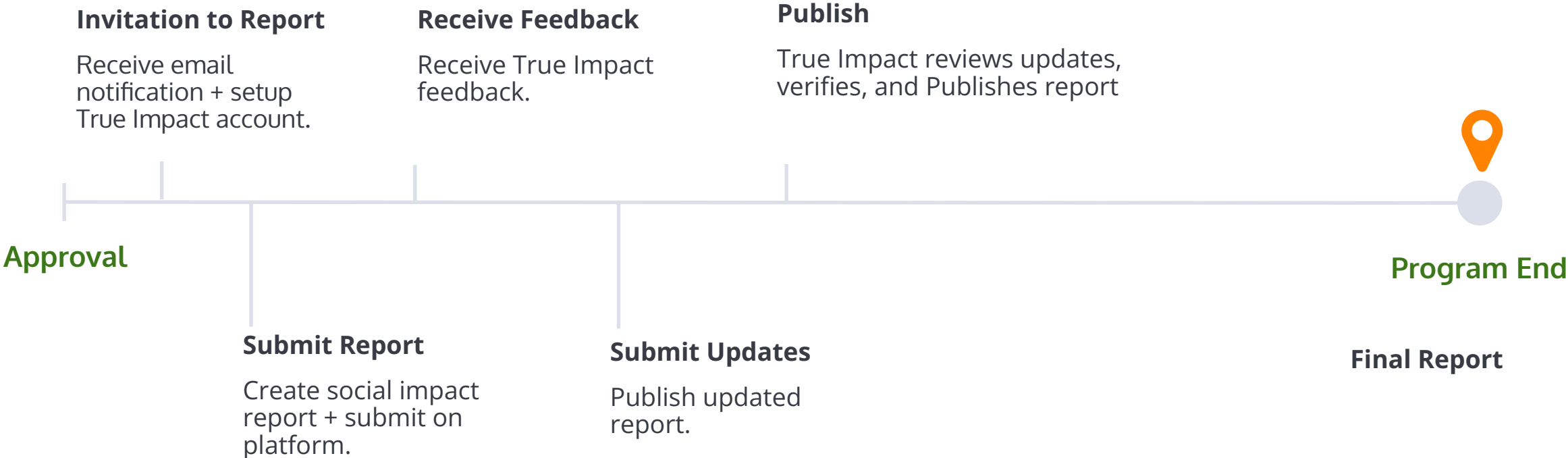
**Investment Type**  
**Foundational**  
from options: incremental, significant, or foundational

**Funder's Claim** (enabled all of the outcomes, including...)  
750 people gain safe and affirming environments  
1,000 strengthen their civic engagement



# True Impact Reporting Process

## Initial / Interim Forecast



# Creating an Account & Allocating Investment

# Use Credentials Shared Via Email

Use credentials in the invitation to create your account or login to an existing account.

This is your invitation to create an account at [www.trueimpact.com/signup](http://www.trueimpact.com/signup), or log into your existing account at [www.trueimpact.com/login](http://www.trueimpact.com/login). Note that you are the only one from your organization who has received this notification email.

Please report on your program's targets or actual outcomes for the following investment:

Organization:

Program:

Investment:

## **Step One: Initial Social Impact Report**

- Create a new True Impact reporting account at [www.trueimpact.com/signup](http://www.trueimpact.com/signup) to accept the investment and create a new report. When reporting or projecting your outcomes, you will be asked to define both your outcome goals and your measurement plans to track progress towards those goals. These initial outcome projections will be saved in your report as a forecast.
- Within approximately one week of submitting your draft Initial Report, you will receive feedback on your forecast from True Impact.
- Upon receipt of our feedback, you'll have five days to update your initial report. Once you've updated your initial report with our feedback, your initial report will be shared with your funder.

## **Step Two: Final Social Impact Report**

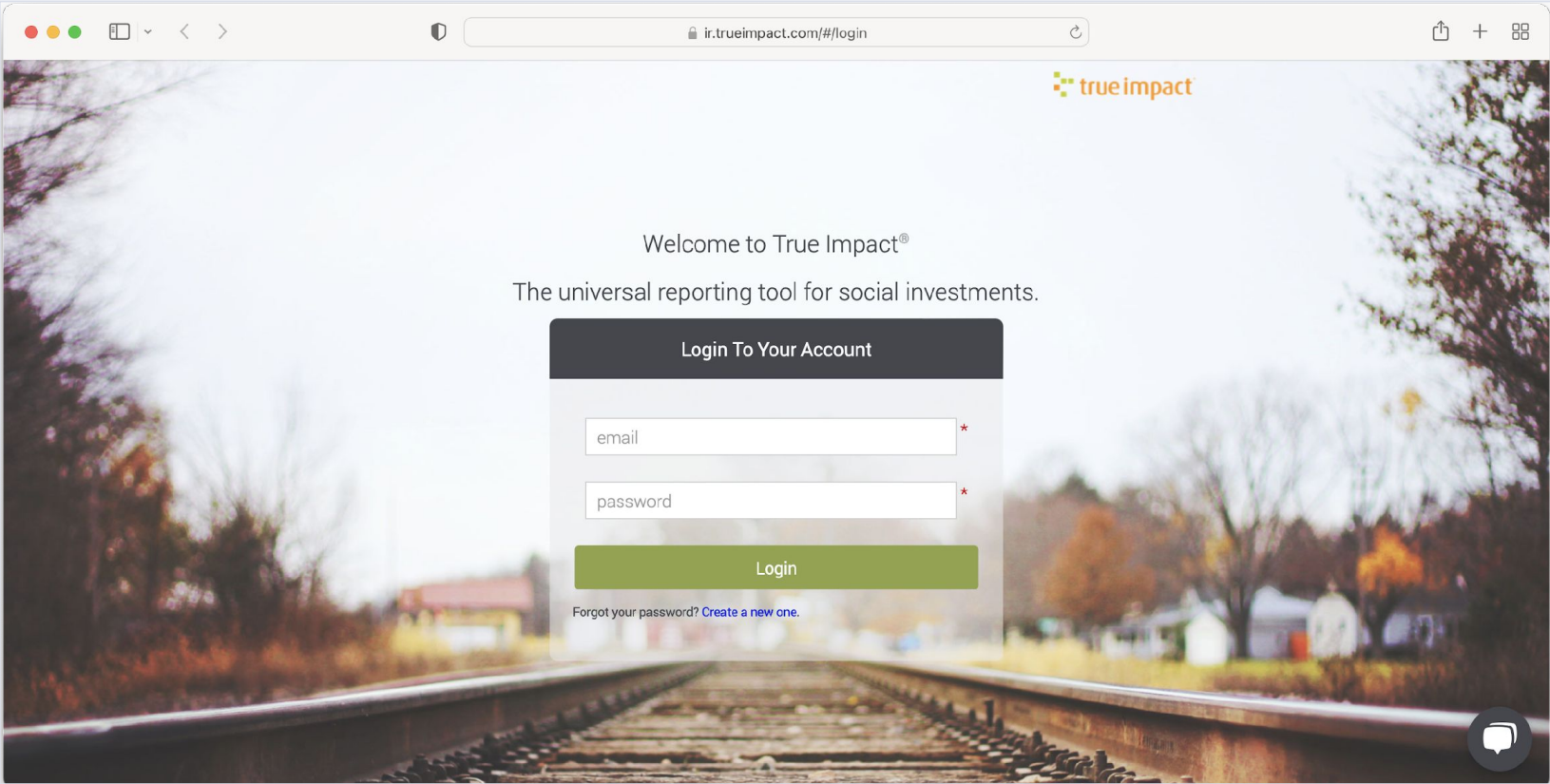
- 30 days following the completion of your grant agreement or report period, please update your initial report with final results. This update will be your final report.

If you have any questions during the final reporting process, I'm here to help.



# Sign Up or Login

Use credentials in the invitation to create your account or login to an existing account.



# Add Users

Add additional users once the account is created, or share a PDF with your team and stakeholders.

## Share the account

- In Left navigation bar, click ACCOUNT
- Click Manager Users
- Click + Add User button
- Include collaborators

## Share a PDF

- In Left navigation bar, click Investments
- Click on print icon to print your report

Name	E-mail	Job Title	Role
North Way	smiller+demograntee@trueimpact.com		admin
Emerson Sarmiento	esarmiento+demograntee@trueimpact.com		admin
Sara Ansell	sansell+demograntee2@trueimpact.com		admin
Farron Levy	flevy+demograntee2@trueimpact.com		admin
Sadie Miller	smiller+demo@trueimpact.com		admin
Chelsea Takamine	demograntee2@trueimpact.com		admin
Sadie Miller	sadie.miller+demo@gmail.com	Director, Client Success	admin
Gabe Cohen	gcohen+demonpo@trueimpact.com	Director, Marketing	admin
Rondi Johnson	rjohnson+grantee@trueimpact.com		admin
Dipali Lohar	dlohar+grantee@trueimpact.com		admin
Robin Hesse	rhesse+grantee@trueimpact.com		admin
Yuvika Koul	ykoul+npo@trueimpact.com		admin

# Allocate the Investment

1

Allocate and Confirm  
Investment

Confirm Investment

# Allocate the Investment

1

Allocate and Confirm Investment

Confirm Investment

2

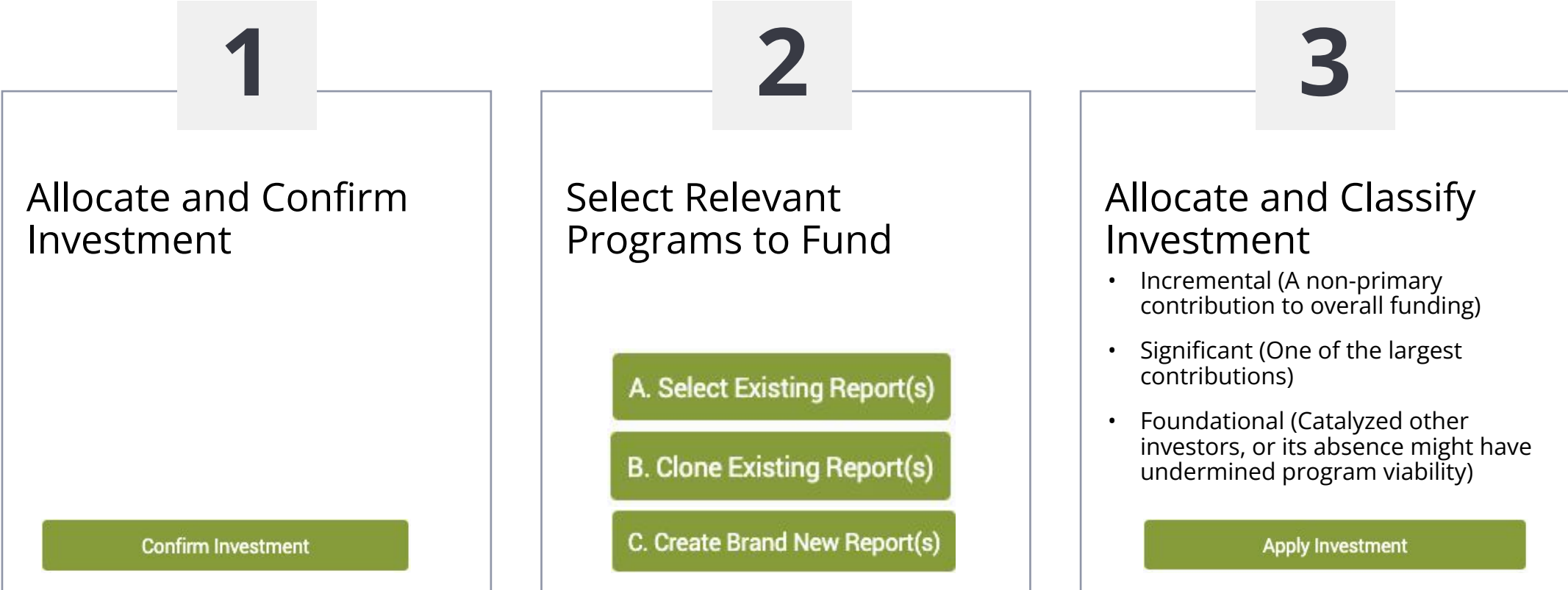
Select Relevant Programs to Fund

A. Select Existing Report(s)

B. Clone Existing Report(s)

C. Create Brand New Report(s)

# Allocate the Investment



# Cloning a Previous Report

1

TO DO

**REPORTS**

REPORTS RATINGS

INVESTMENTS

ACCOUNT

SIGN OUT

3

Clone program: ✕

The cloned report has been given the same Program Name as the parent report, but with start/end dates one year later.

Program or Initiative Name \*

Report Start Date \*

Report End Date \*

**OK**

2

Report Status	Content Status	Last Updated	Investments	Ratings	Clone	Delete
Interim Report (Awaiting TI Verification)	<ul style="list-style-type: none"> <li><input checked="" type="checkbox"/> Overview</li> <li><input checked="" type="checkbox"/> Intervention</li> <li><input checked="" type="checkbox"/> Beneficiaries</li> <li><input checked="" type="checkbox"/> Outcomes</li> <li><input checked="" type="checkbox"/> Budget</li> </ul>	30 Aug 2022	1	—		

# Update Your Report

Your new report shows up in Reports to be submitted or published.

The screenshot shows a web browser window with the URL `ir.trueimpact.com/#/todo`. The dashboard is divided into two main sections:

- Investments to be allocated: 0**  
All investments have been allocated!
- Reports to be submitted or published: 6**

Program or Initiative Name / Funding Term	Report Status	Content Status
1. SAMPLE Food Security Jul-01-2020 to Jun-30-2021	Final Report (TI Feedback Provided)	Overview ✓ Intervention ✓ Beneficiaries ✓ Outcomes ✓ Budget ✓ Narratives ✓ <input type="checkbox"/> Update
2. General Operations Jul-01-2021 to Jul-01-2022	Interim Report (Not Yet Submitted for Review)	Overview ✓ Intervention ✓ Beneficiaries ✓ Outcomes ✓ Budget ✓ <input type="checkbox"/> Update
3. Teaching for Equity and Justice Jun-30-2021 to Jun-30-2022	Initial Report (Not Yet Submitted for Review)	Overview ✓ Intervention ✓ Beneficiaries ✓ Outcomes ✓ Budget ✓ <input type="checkbox"/> Update
4. Global Poverty Jan-04-2022 to Jan-28-2022	Initial Report (Not Yet Submitted for Review)	Overview ○ Intervention ✓ Beneficiaries ✓ Outcomes ○ Budget ○ <input type="checkbox"/> Update

A dashed orange box highlights the 'Update' button for the 'Teaching for Equity and Justice' report. A chat bubble icon is visible in the bottom right corner of the dashboard.

# Submitting a Report



# Describe Your Program

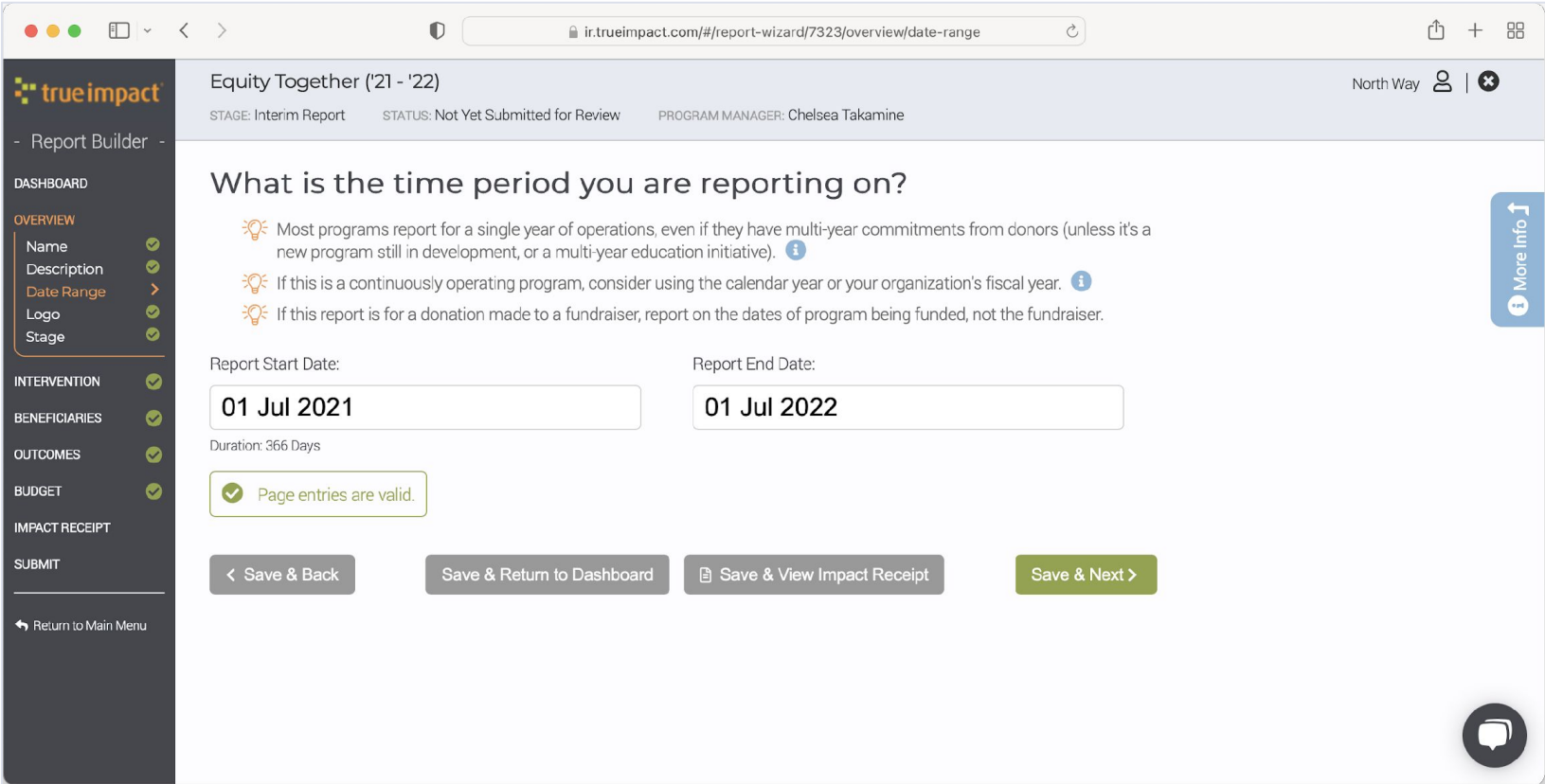
Name and describe the program.

- If this is a *gala, luncheon, or general operations grant*, report on your total programmatic efforts.
- If this is a *convention*, describe the event and its outcomes on participants and organizations.

The screenshot shows a web browser window with the URL `ir.trueimpact.com/#report-wizard/7327/overview/description`. The page title is "Teaching for Equity and Justice ('21 - '22)". The interface includes a sidebar menu with the following items: "Report Builder", "DASHBOARD", "OVERVIEW" (with sub-items: Name, Description, Date Range, Logo, Stage), "INTERVENTION", "BENEFICIARIES", "OUTCOMES", "BUDGET", "IMPACT RECEIPT", and "SUBMIT". The main content area is titled "Briefly describe Teaching for Equity and Justice" and contains three bullet points with lightbulb icons: "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.", "Here's a good way to start: 'We help [this group of beneficiaries] achieve [this successful outcome] by providing [these services, activities, or resources].' Then add details.", and "Use the present tense (e.g., 'We help...' instead of 'We will help...') so your wording is appropriate for any reporting stage." Below these points is a text input field containing the text: "We engage young people in deep civic learning by providing challenging content through a process that builds knowledge, skills, and dispositions. Our classes integrate the study of history and literature with ethical decision-making and innovative teaching strategies." A status message below the text says "63 words remaining." and "Page entries are valid." At the bottom of the form are four buttons: "Save & Back", "Save & Return to Dashboard", "Save & View Impact Receipt", and "Save & Next >".

# Include Program Implementation Dates

Consider the report date range as bookends of your report.



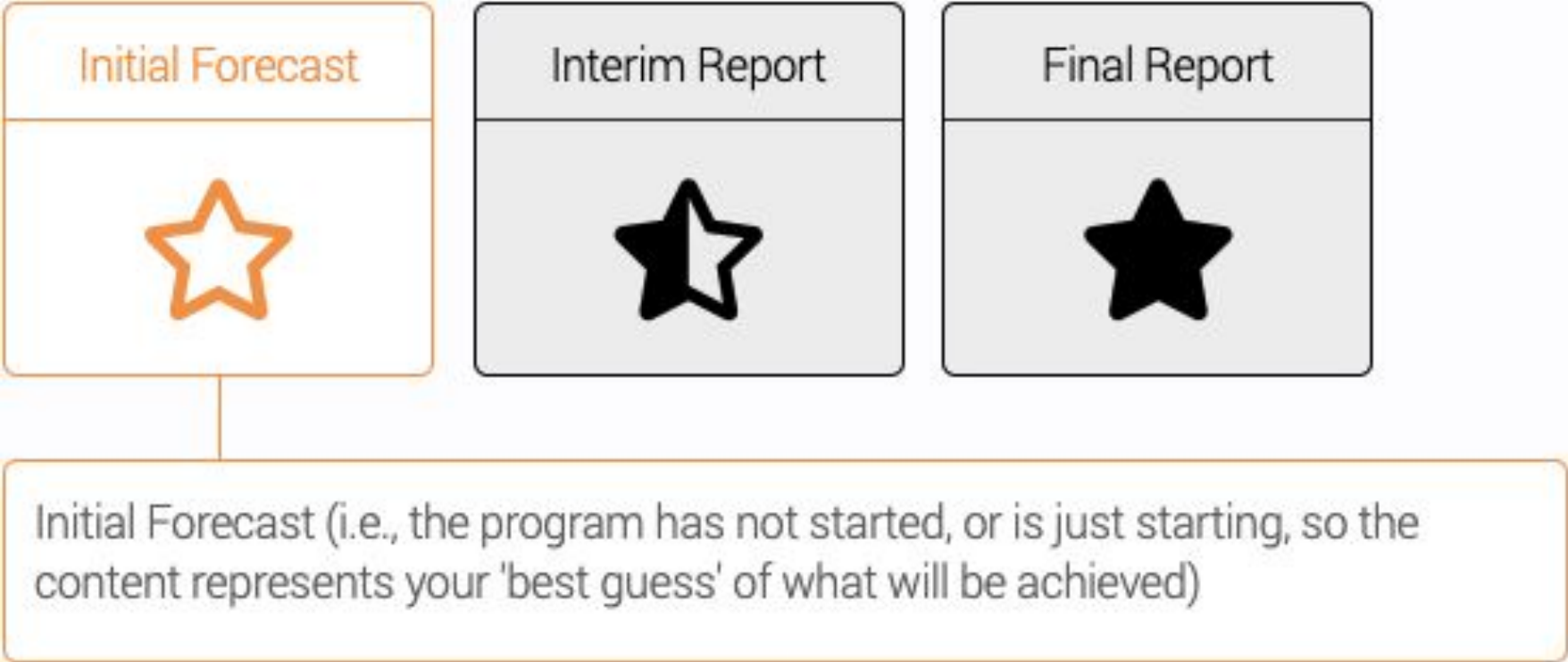
# Add a Small Logo

Twitter logos work great!

The screenshot shows a web browser window with the URL `ir.trueimpact.com/#/report-wizard/7323/overview/logo`. The page title is "Equity Together ('21 - '22)". The user is logged in as "North Way". The page is titled "Add your organization or program logo". It includes two lightbulb icons with instructions: "Ensure it is complete, easy to read, and centered." and "If appropriate, consider using a simplified version of your logo, as is often used for Twitter." A dashed box contains a blue icon of three stylized figures. Below the box is a button that says "+ Select or Upload New Logo". A green checkmark icon and the text "Page entries are valid." are displayed. At the bottom, there are four buttons: "< Save & Back", "Save & Return to Dashboard", "Save & View Impact Receipt", and "Save & Next >". A "More Info" button is on the right side, and a chat icon is in the bottom right corner.

# Select Your Implementation Stage

Select the current stage of your program.



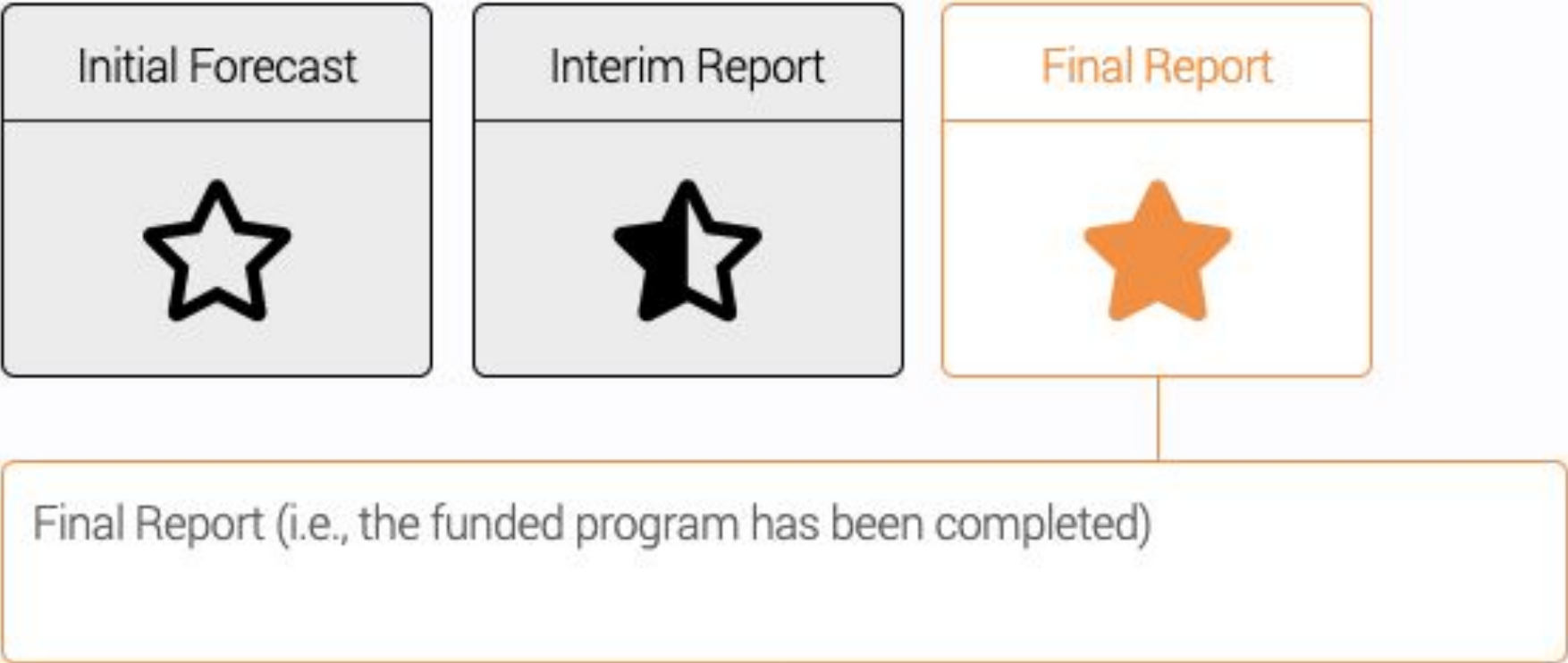
# Select Your Implementation Stage

Select the current stage of your program.



# Select Your Implementation Stage

Select the current stage of your program.



# What do you do?

Select your cause, intervention approach, duration and intensity, and program details.

The screenshot shows a web browser window with the URL `ir.trueimpact.com/#/report-wizard/7327/intervention/core-service`. The page title is "Teaching for Equity and Justice ('21 - '22)". The user is logged in as "North Way". The page status is "STAGE: Initial Report", "STATUS: Not Yet Submitted for Review", and "PROGRAM MANAGER: Chelsea Takamine".

The main content area is titled "What is Teaching for Equity and Justice's primary social cause?". It includes two lightbulb icons with text: "If your program could be reasonably be placed in multiple categories, choose the one you consider most important or fundamental" and "Your selection should also represent your most relevant peer group (for sharing best practices among similar organizations)".

Below the text is a "Reset To Original" button and a list of social causes with corresponding icons: Agriculture, fishing and forestry; Animal welfare (domesticated); Arts and culture; Community and economic development; Disasters and emergency management; Education; Environment; Health; and Housing.

The left sidebar contains a navigation menu with the following items: DASHBOARD, OVERVIEW (checked), INTERVENTION (highlighted), Core Service (selected), Type, Frequency & Duration, Additional Information (checked), BENEFICIARIES (checked), OUTCOMES (checked), BUDGET (checked), IMPACT RECEIPT, and SUBMIT. A "Return to Main Menu" link is at the bottom of the sidebar.

On the right side of the main content area, there is a "More Info" button and a chat icon.

# Where do you serve?

Identify your program locations.

The screenshot shows a web browser window with the URL `ir.trueimpact.com/#/report-wizard/7327/beneficiaries/locations`. The page title is "Teaching for Equity and Justice ('21 - '22)". The user is logged in as "North Way". The interface includes a sidebar with navigation options: Dashboard, Overview, Intervention, Beneficiaries (with sub-items: Locations, Demographics, Description), Outcomes, Budget, Impact Receipt, and Submit. The main content area is titled "What location(s) does Teaching for Equity and Justice serve?". It contains two instructional paragraphs: "Report at the city level if possible, but if the service area is larger than that, report at the county, state, province, region, or country level, as appropriate." and "To ensure your location is recognized by our system, select an option from the autocomplete list that generates under the field you are typing in." Below these instructions are five input fields, each labeled "Service Location (X) \*" and containing a location name: "Chicago, IL, USA", "Boston, MA, USA", "Oakland, CA, USA", "Dallas, TX, USA", and "Detroit, MI, USA". Each field has a trash icon to its right. A "More Info" button is on the right side, and a chat icon is at the bottom right.



# Who benefits from your work?

Select all relevant demographic categories.

The screenshot shows a web browser window with the URL `ir.trueimpact.com/#/report-wizard/7327/beneficiaries/demographics`. The page title is "Teaching for Equity and Justice ('21 - '22)". The user is identified as "North Way". The interface includes a sidebar with navigation options: Dashboard, Overview, Intervention, Beneficiaries (Locations, Demographics, Description), Outcomes, Budget, Impact Receipt, and Submit. The main content area is titled "Describe the demographics of the beneficiaries served by Teaching for Equity and Justice". It contains three lightbulb icons with instructions: "Select all demographic categories you can reasonably report on, to addresses the varying interests of different funders that may view this report.", "Be as precise as possible in reporting your percentages, but estimates are fine.", and "Report only on the target 'end beneficiaries' of your program; do not include intermediaries or service providers." Below these instructions is a table with columns "Demographic" and "Percentage", and a "+ add/edit demographic" button. A warning message states: "At least one beneficiary demographic is required." A red warning banner at the bottom says: "You have categorized only a portion of your beneficiaries. Please consider adding more detail." There are four buttons at the bottom: "Save & Back", "Save & Return to Dashboard", "Save & View Impact Receipt", and "Save & Next >". A "More" button is visible on the right side of the interface.

Demographics don't need to equal 100% Don't leave any blank

# Who benefits from your work?

Add any notes relevant to your beneficiaries, and dismiss alerts if not relevant.

The screenshot shows a web browser window with the URL `ir.trueimpact.com/#/report-wizard/7327/beneficiaries/description`. The page title is "Teaching for Equity and Justice ('21 - '22)". The user is logged in as "North Way". The page status is "Initial Report", "Not Yet Submitted for Review", and the program manager is "Chelsea Takamine".

The main heading is "Briefly provide any additional descriptive information on the beneficiaries served by Teaching for Equity and Justice". Below this, there are two lightbulb icons with text: "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." and "Report only on the target 'end beneficiaries' of your program; do not include intermediaries or service providers."

A text input field contains the text: "Students served attend local public schools representing a diversity of economic and racial backgrounds." Below the field, it says "236 words remaining." and a green checkmark icon with the text "Page entries are valid."

At the bottom, there are four buttons: "Save & Back", "Save & Return to Dashboard", "Save & View Impact Receipt", and "Save & Next >".

The left sidebar shows a navigation menu with the following items: "Report Builder", "DASHBOARD", "OVERVIEW", "INTERVENTION", "BENEFICIARIES" (highlighted), "Locations", "Demographics", "Description", "OUTCOMES", "BUDGET", "IMPACT RECEIPT", and "SUBMIT".

At the bottom left of the sidebar, there is a link "Return to Main Menu".

# Our Logic Model Approach

True Impact uses a 5 stage logic model to define success and measure outcomes.



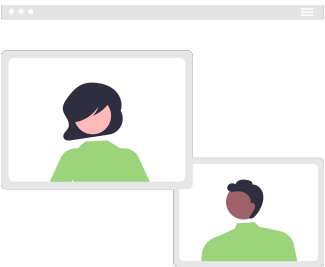
# Logic Model Example

Consider how the model could be used for program focusing on **social emotional learning**.



**Program Development**

Staff trained,  
tools purchased



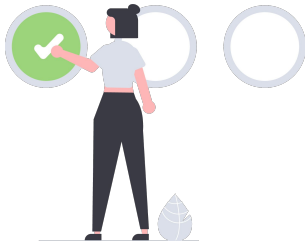
**Reach**

Students reached



**Learn**

Students learn  
skills, motivation



**Act**

Students change  
their behavior



**Succeed**

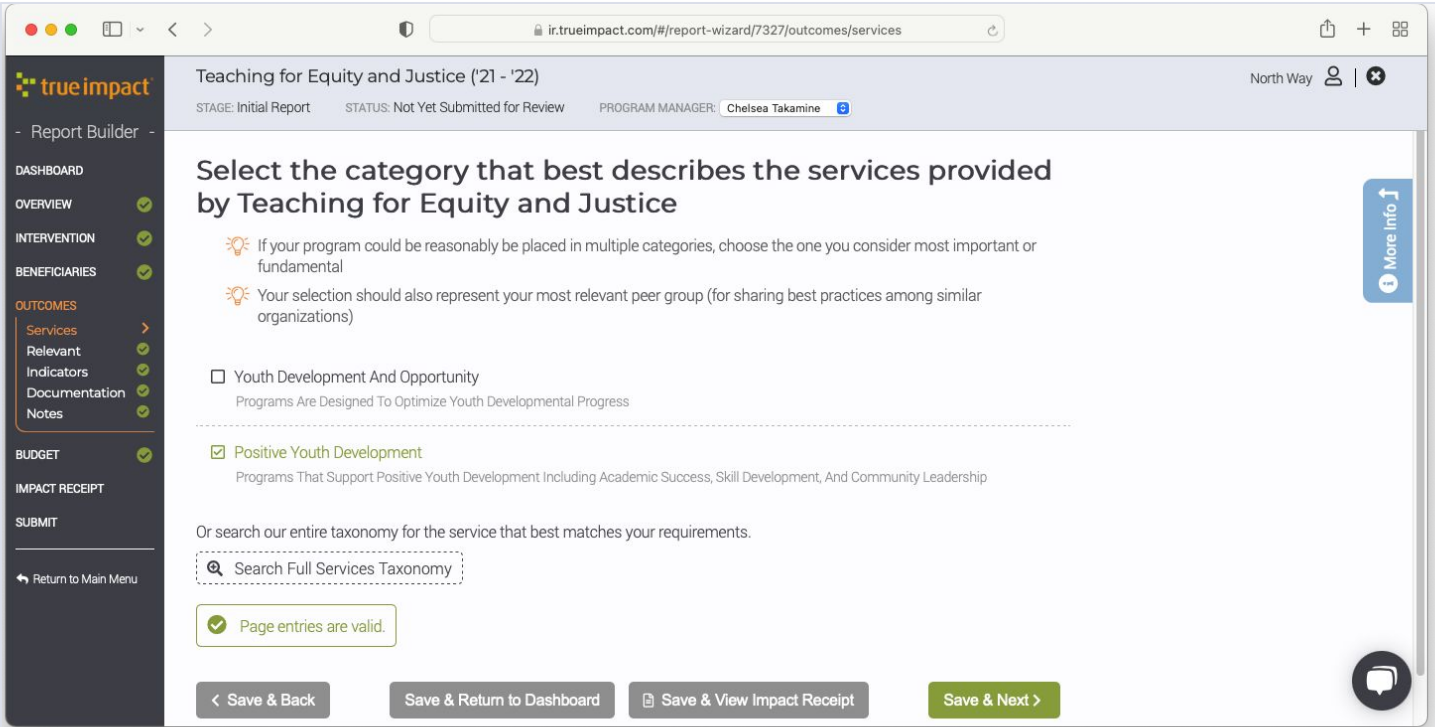
Students gain  
safety

# Select Your Logic Model

Select the most appropriate model to align with your program approach.

## Key steps in the outcomes section

- ✓ Select indicators in Outcomes > Relevant
- ✓ Define threshold of success
- ✓ Define measurement approach



# Select Program Development Indicators

This includes new policies, programs, resources developed, or collaborations expanded.

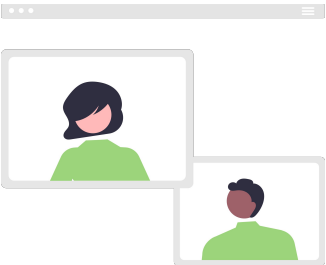


**Program Development Strengthens program**

A screenshot of the True Impact web application interface. The browser address bar shows the URL: ir.trueimpact.com/#report-wizard/7327/outcomes/relevant. The page title is "Teaching for Equity and Justice ('21 - '22)". The user is identified as "North Way". The interface includes a sidebar menu with options: Dashboard, Overview, Intervention, Beneficiaries, Outcomes (Services, Relevant, Indicators, Documentation, Notes), Budget, Impact Receipt, and Submit. The main content area is titled "Select the relevant results at each stage" and provides instructions: "Include all significant expected results, regardless of your ability to measure them." and "Avoid selecting multiple indicators to represent the same impact; concise impact models are superior to redundant ones." Below this, a flow diagram shows the stages: PROGRAM DEVELOPMENT (highlighted) -&gt; REACHED -&gt; LEARN -&gt; ACT -&gt; SUCCEED (SOCIAL IMPACT). The "Select your relevant Program Development performance indicators:" section lists three options: "Tools/Systems/Other Infrastructures Developed, Enhanced" (unchecked), "Staff/Volunteers/Implementers Added, Trained" (checked), and "Programs Or Services Created, Enhanced" (unchecked). A "More Info" button is visible on the right side of the interface.

# Select Reach Indicator

The number of people who are served or participate.



## Reach

Program delivers service to people

The screenshot shows the True Impact Report Builder interface for a report titled "Teaching for Equity and Justice ('21 - '22)". The interface includes a sidebar with navigation options: DASHBOARD, OVERVIEW, INTERVENTION, BENEFICIARIES, OUTCOMES (with sub-items: Services, Relevant, Indicators, Documentation, Notes), BUDGET, IMPACT RECEIPT, and SUBMIT. The "Relevant" indicator is currently selected. The main content area displays the "Select the relevant results at each stage" section, with instructions to include significant expected results and avoid redundant indicators. Below this, the "Positive Youth Development Impact Model" is shown with a progress flow: PROGRAM DEVELOPMENT → REACHED → LEARN → ACT → SUCCEED (SOCIAL IMPACT). The "REACHED" stage is highlighted, and a box prompts the user to "Select your relevant Reached performance indicators:", with "People Reached" selected. The description for "People Reached" is "Number Of Beneficiaries That Participate In, Or Are Directly Served By, The Program." Navigation buttons include "Back", "Return to Dashboard", "Impact Receipt", and "Next". A confirmation message at the bottom states "Page entries are valid."

# Select Learn Indicator (if relevant)

The number of people who gain the skills, knowledge, or access to improve their wellbeing.



## Learn

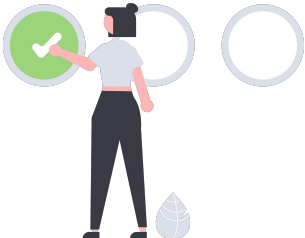
Who gain knowledge or resources

The screenshot shows the True Impact Report Wizard interface for a report titled "Teaching for Equity and Justice ('21 - '22)". The interface includes a sidebar with navigation options: DASHBOARD, OVERVIEW, INTERVENTION, BENEFICIARIES, OUTCOMES (with sub-items: Services, Relevant, Indicators, Documentation, Notes), BUDGET, IMPACT RECEIPT, and SUBMIT. The "Relevant" sub-item under "OUTCOMES" is highlighted. The main content area displays the title "Teaching for Equity and Justice ('21 - '22)" and the status "STAGE: Initial Report | STATUS: Finalized | PROGRAM MANAGER: Chelsea Takamine". Below this, the instruction "Select the relevant results at each stage" is followed by two bullet points: "Include all significant expected results, regardless of your ability to measure them." and "Avoid selecting multiple indicators to represent the same impact; concise impact models are superior to redundant ones." The "Positive Youth Development Impact Model" is shown with a progress bar: PROGRAM DEVELOPMENT → REACHED → LEARN → ACT → SUCCEED (SOCIAL IMPACT). The "LEARN" step is highlighted. A box titled "Select your relevant Learn performance indicators:" contains a checked checkbox for "Beneficiaries Gain Capacity, Motivation" with a sub-description: "Number Of People That Gain The Skills, Knowledge, Access To Resources, Appreciation, Or Motivation To Pursue The Program's Intended Social Impact Goals." At the bottom, there are buttons for "Back", "Return to Dashboard", "Impact Receipt", and "Next". A green message box at the bottom left states "Page entries are valid." A "More Info" button is on the right side, and a chat icon is at the bottom right.



# Select Act Indicator (if relevant)

The number of people who take action or change behavior to improve their wellbeing.



Act

Then change  
behavior

The screenshot shows a web browser window with the URL `ir.trueimpact.com/#/report-wizard/7327/outcomes/relevant`. The page title is "Teaching for Equity and Justice ('21 - '22)". The user is logged in as "North Way". The interface includes a sidebar menu with options like "Dashboard", "Overview", "Intervention", "Beneficiaries", "Outcomes", "Budget", "Impact Receipt", and "Submit". The "Outcomes" section is expanded, showing "Services", "Relevant", "Indicators", "Documentation", and "Notes". The "Relevant" option is selected. The main content area displays the heading "Select the relevant results at each stage" and provides instructions: "Include all significant expected results, regardless of your ability to measure them." and "Avoid selecting multiple indicators to represent the same impact; concise impact models are superior to redundant ones." Below this, the "Positive Youth Development Impact Model" is shown with a progress bar: "PROGRAM DEVELOPMENT → REACHED → LEARN → ACT → SUCCEED (SOCIAL IMPACT)". The "ACT" step is highlighted. A box prompts the user to "Select your relevant Act performance indicators:" and shows a checked option: "Take Action [configure details \*]" with the description "Number Of Participants Who Take Action, Change Behavior, Or Pursue The Program's Intended Social Impact Goals." At the bottom, there are buttons for "Back", "Return to Dashboard", "Impact Receipt", and "Next >". A green message box at the bottom left states "Page entries are valid." A "More Info" button is visible on the right side of the page.

# Select Success Indicators

The number of people who success or gain health, safety, wellbeing.



**Succeed**  
To improve  
their lives

A screenshot of the True Impact Report Builder web application. The browser address bar shows 'ir.trueimpact.com/#/report-wizard/7327/outcomes/relevant'. The page title is 'Teaching for Equity and Justice ('21 - '22)'. The user is logged in as 'North Way'. The interface includes a left sidebar with navigation options: DASHBOARD, OVERVIEW, INTERVENTION, BENEFICIARIES, OUTCOMES (with sub-items: Services, Relevant, Indicators, Documentation, Notes), BUDGET, IMPACT RECEIPT, and SUBMIT. The main content area is titled 'Select the relevant results at each stage' and provides instructions: 'Include all significant expected results, regardless of your ability to measure them.' and 'Avoid selecting multiple indicators to represent the same impact; concise impact models are superior to redundant ones.' Below this, a flow diagram shows 'PROGRAM DEVELOPMENT' leading to 'REACHED', 'LEARN', 'ACT', and 'SUCCEED (SOCIAL IMPACT)'. The 'SUCCEED (SOCIAL IMPACT)' step is highlighted. A section titled 'Select your relevant Succeed (Social Impact) performance indicators:' lists several options with checkboxes: 'Community Leaders Activated, Strengthened', 'People Gain Safe And Affirming Environments' (checked), 'Graduate High School', and 'Access Post-Secondary Education'. Each option includes a brief description of the metric. A 'More Info' button is on the right, and a chat icon is at the bottom right.

# Indicators: What do you mean?

Define your success, including the threshold or level of achievement for the indicator.

The screenshot shows the True Impact web application interface. The browser address bar displays the URL: `ir.trueimpact.com/#/report-wizard/7327/outcomes/indicators/Capacity-Developed/2`. The page title is "Teaching for Equity and Justice ('21 - '22)". The user is identified as "North Way".

The navigation sidebar on the left includes the following items:

- Report Builder
- DASHBOARD
- OVERVIEW
- INTERVENTION
- BENEFICIARIES
- OUTCOMES
  - Services
  - Relevant
  - Indicators
  - Documentation
  - Notes
- BUDGET
- IMPACT RECEIPT
- SUBMIT
- Return to Main Menu

The main content area shows a breadcrumb trail: PROGRAM DEVELOPMENT (400) → REACHED (2,500) → LEARN (500) → ACT (400) → SUCCEED (SOCIAL IMPACT) (1,000). The current indicator is "400 Staff/Volunteers/Implementers Added, Trained".

The indicator description includes:

- Number Of People Recruited Or Hired Into Paid Or Unpaid Positions To Improve Or Expand Program Implementation; And/Or Number Of New Or Existing Program Staff Or Program Collaborators (E.g., Community Members, Civic Leaders, Family Members Or Caregivers, Members Of Partner Organizations Or Initiatives) Provided Skills, Knowledge, Resources, Or Incentives To Improve Or Expand Program Implementation.**
- Success Criteria:** Number of trained teachers are more confident and skilled at fostering students' academic, civic, and social and emotional learning.
- How are you measuring this indicator (once the program is fully implemented):** Objective assessment of program development gains reported by program implementers (e.g., based on surveys or tests using specific, predefined evaluation criteria)
- Please describe your sources/assumptions:** We will implement a survey at the end of program participation to understand what the teachers learned through participation.

The "Step 1: Define program development" section asks: "What specific new or improved resources or capabilities will define success at this level?". A text input field contains the text: "Number of trained teachers are more confident and skilled at fostering students' academic, civic, and social and emotional learning." Below the input field, it indicates "118 characters remaining." and a "Next Step" button is visible.

# Indicators: How many?

Forecast the number who achieve this indicator.

The screenshot shows a web browser window displaying the True Impact report wizard. The URL is [ir.trueimpact.com/#/report-wizard/7327/outcomes/indicators/Capacity-Developed/2](https://ir.trueimpact.com/#/report-wizard/7327/outcomes/indicators/Capacity-Developed/2). The page title is "Teaching for Equity and Justice ('21 - '22)". The user is logged in as "North Way". The report is in the "Initial Report" stage, "Not Yet Submitted for Review", and managed by "Chelsea Takamine".

The main content area shows a progress bar for "PROGRAM DEVELOPMENT (400)" leading to "REACHED (2,500)", "LEARN (500)", "ACT (400)", and "SUCCEED (SOCIAL IMPACT) (1,000)". The selected indicator is "1 | 400 Staff/Volunteers/Implementers Added, Trained".

**Number Of People Recruited Or Hired Into Paid Or Unpaid Positions To Improve Or Expand Program Implementation; And/Or Number Of New Or Existing Program Staff Or Program Collaborators (E.g., Community Members, Civic Leaders, Family Members Or Caregivers, Members Of Partner Organizations Or Initiatives) Provided Skills, Knowledge, Resources, Or Incentives To Improve Or Expand Program Implementation.**

**Success Criteria:** Number of trained teachers are more confident and skilled at fostering students' academic, civic, and social and emotional learning.

**How are you measuring this indicator (once the program is fully implemented):** Objective assessment of program development gains reported by program implementers (e.g., based on surveys or tests using specific, predefined evaluation criteria)

**Please describe your sources/assumptions:** We will implement a survey at the end of program participation to understand what the teachers learned through participation.

Step 1: Define program development [+ Show all indicator fields](#)

Step 2: Quantify program development  
How many new or improved resources or capabilities do you forecast will result?

Current Forecast:

[Next Step](#)

# Indicators: How do you know?

Categorize your measurement as directly measured, estimated, or guess.

Teaching for Equity and Justice ('21 - '22)

STAGE: Initial Report STATUS: Not Yet Submitted for Review PROGRAM MANAGER: Chelsea Takamine

PROGRAM DEVELOPMENT (400) → REACHED (2,500) → LEARN (500) → ACT (400) → SUCCEED (SOCIAL IMPACT) (1,000)

**Success Criteria:** Number of trained teachers are more confident and skilled at fostering students' academic, civic, and social and emotional learning.

**Please describe your sources/assumptions:** We will implement a survey at the end of program participation to understand what the teachers learned through participation.

Step 1: Define program development [+ Show all indicator fields](#)

Step 2: Quantify program development

**> Step 3: Categorize measurement**  
How will you determine the actual number of capacities gained for your Jun 30, 2021-Jun 30, 2022 final report?

Guess	Estimate (From Data)	Directly Measured
?	📈	⚖️

[↶ Reset To Original](#)

# Indicators: Share Tools (optional)

Upload relevant measurement instruments and tools, if available.

The screenshot displays the True Impact report wizard interface for the program "Teaching for Equity and Justice ('21 - '22)". The interface is divided into a left sidebar and a main content area. The sidebar contains a navigation menu with the following items: "Report Builder", "DASHBOARD", "OVERVIEW" (checked), "INTERVENTION" (checked), "BENEFICIARIES" (checked), "OUTCOMES" (highlighted), "Services" (checked), "Relevant" (checked), "Indicators" (highlighted), "Documentation" (checked), "Notes" (checked), "BUDGET" (checked), "IMPACT RECEIPT", "SUBMIT", and "Return to Main Menu". The main content area shows the current step in a progress bar: "PROGRAM DEVELOPMENT (400)" → "REACHED (2,500)" → "LEARN (500)" → "ACT (400)" → "SUCCEED (SOCIAL IMPACT) (1,000)". Below the progress bar, the main content area contains the following text: "How are you measuring this indicator (once the program is fully implemented): Other direct measurement of capacity gains [please describe in next step]". "Please describe your sources/assumptions: We will implement a survey at the end of program participation to understand what the teachers learned through participation." Below this text, there is a list of steps: "Step 1: Define program development" (checked), "Step 2: Quantify program development" (checked), "Step 3: Categorize measurement" (checked), and "Step 4: Upload backup" (unchecked). A "Show all indicator fields" button is located next to Step 1. Below Step 4, there is a "Add Files" button and a list of acceptable file types: ".doc, .docx, .odt, .pdf, .xls, .xlsx, .ods, .ppt, .pptx and .txt". A "Next Step" button is located at the bottom of the main content area. The True Impact logo is visible in the top left corner of the browser window.

# Indicators: Describe Measurement

Describe how the data will be collected.

The screenshot displays the True Impact web application interface for describing measurement indicators. The browser address bar shows the URL: `ir.trueimpact.com/#/report-wizard/7327/outcomes/indicators/Capacity-Developed/2`. The page title is "Teaching for Equity and Justice ('21 - '22)".

Navigation and status information includes:

- STAGE: Initial Report
- STATUS: Not Yet Submitted for Review
- PROGRAM MANAGER: Chelsea Takamine
- User: North Way

The main content area shows a progress bar for "PROGRAM DEVELOPMENT (400)" with a sequence of steps: REACHED (2,500) → LEARN (500) → ACT (400) → SUCCEED (SOCIAL IMPACT) (1,000). The "PROGRAM DEVELOPMENT (400)" step is highlighted.

The "Describe process" step (Step 5) is active, with the instruction: "Briefly describe how the capacity data will be collected, including who will do it, when, and how frequently." The text box contains the following description:

**We will implement a survey at the end of program participation to understand what the teachers learned through participation.**

125 characters remaining.

A "Save & Next Indicator >" button is located at the bottom right of the interface.

# Add Context

This is an opportunity to upload relevant documents and add notes on your outcome model.

The screenshot shows a web browser window with the URL `ir.trueimpact.com/#/report-wizard/7327/outcomes/documentation`. The page title is "Teaching for Equity and Justice ('21 - '22)". The user is logged in as "North Way". The page status is "STAGE: Initial Report", "STATUS: Not Yet Submitted for Review", and "PROGRAM MANAGER: Chelsea Takamine".

The main content area is titled "Upload documents that provide backup or context for your impact model (optional)". It features a dashed box with a plus icon and the text "Upload Document (or drag here)". Below this, it lists acceptable file types: ".doc, .docx, .odt, .pdf, .xls, .xlsx, .ods, .ppt, .pptx and .txt". A green checkmark icon and the text "Page entries are valid." are displayed in a box.

At the bottom of the main content area, there are four buttons: "Save & Back", "Save & Return to Dashboard", "Save & View Impact Receipt", and "Save & Next >".

The left sidebar contains a navigation menu with the following items: "Report Builder", "DASHBOARD", "OVERVIEW" (checked), "INTERVENTION" (checked), "BENEFICIARIES" (checked), "OUTCOMES" (checked), "Services" (checked), "Relevant" (checked), "Indicators" (checked), "Documentation" (checked and highlighted), "Notes" (checked), "BUDGET" (checked), "IMPACT RECEIPT", "SUBMIT", and "Return to Main Menu".

On the right side, there is a "More Info" button with an upward arrow and a chat icon at the bottom right.



# Provide a High Level Budget

Provide a total program budget of the program, and update your Investment Tier, if needed.

The screenshot shows a web browser window with the URL `ir.trueimpact.com/#/report-wizard/7327/budget/direct-cost`. The page title is "Teaching for Equity and Justice ('21 - '22)". The user is logged in as "North Way". The page content includes a sidebar menu with options like "Report Builder", "Dashboard", "Overview", "Intervention", "Beneficiaries", "Outcomes", "Budget", "Impact Receipt", and "Submit". The "Budget" section is expanded, showing "Direct Cost" as the active item. The main content area asks, "What's the expected direct cost of implementing Teaching for Equity and Justice from Jun 30, 2021 to Jun 30, 2022?". It provides instructions: "Enter total cost, not just how a particular investment is being allocated." and "Enter the market value of any in-kind contributions (goods or services, such as volunteerism, office space, pro bono support)". A table below shows the budget breakdown:

Line Items	Current Forecast	Notes (contents of line item)
Direct Expenses	\$ 700,000	Direct program expenses
Direct In-Kind	\$ -	Enter notes for this expense category here.
TOTAL BUDGET	\$ 750,000	
ALL INVESTMENTS	\$ 500,000	

Below the table, there is a section titled "List of Current Investments" with the text "You can update the investment allocation tiers below." and a table with columns "Funder", "Portfolio", "Investment", and "Tier".

# Add Budget Documentation

This is an optional opportunity to upload a detailed budget and any notes on budget changes.

The screenshot shows a web browser window with the URL `ir.trueimpact.com/#/report-wizard/7327/budget/documentation`. The page title is "Teaching for Equity and Justice ('21 - '22)". The user is logged in as "North Way". The page status is "STAGE: Initial Report" and "STATUS: Not Yet Submitted for Review". The program manager is "Chelsea Takamine".

The main content area is titled "Upload documents that provide backup or context for your budget (optional)". It features a dashed box with the text "Upload Document (or drag here)". Below this, it lists acceptable file types: ".doc, .docx, .odt, .pdf, .xls, .xlsx, .ods, .ppt, .pptx and .txt". A green checkmark icon and the text "Page entries are valid." are displayed.

At the bottom of the main content area, there are four buttons: "Save & Back", "Save & Return to Dashboard", "Save & View Impact Receipt", and "Save & Next >".

The left sidebar contains a navigation menu with the following items: "Report Builder", "DASHBOARD", "OVERVIEW" (with a green checkmark), "INTERVENTION" (with a green checkmark), "BENEFICIARIES" (with a green checkmark), "OUTCOMES" (with a green checkmark), "BUDGET" (with a green checkmark), "Direct Cost" (with a green checkmark), "Indirect Cost" (with a green checkmark), "Documentation" (with a green checkmark and a right-pointing arrow), "Notes" (with a green checkmark), "IMPACT RECEIPT", "SUBMIT", and "Return to Main Menu".

A "More Info" button is located on the right side of the page, and a chat icon is in the bottom right corner.

# Review Dashboard



Complete



Add information



Edit or or click  
Dismiss/Not Relevant



Error


The screenshot shows a web browser window with the URL `ir.trueimpact.com/#/report-wizard/4692/impact-receipt/document/4493`. The page title is "Global Engagement ('18)". The status is "Final Report" and "Not Yet Submitted for Review". The program manager is "North Way".

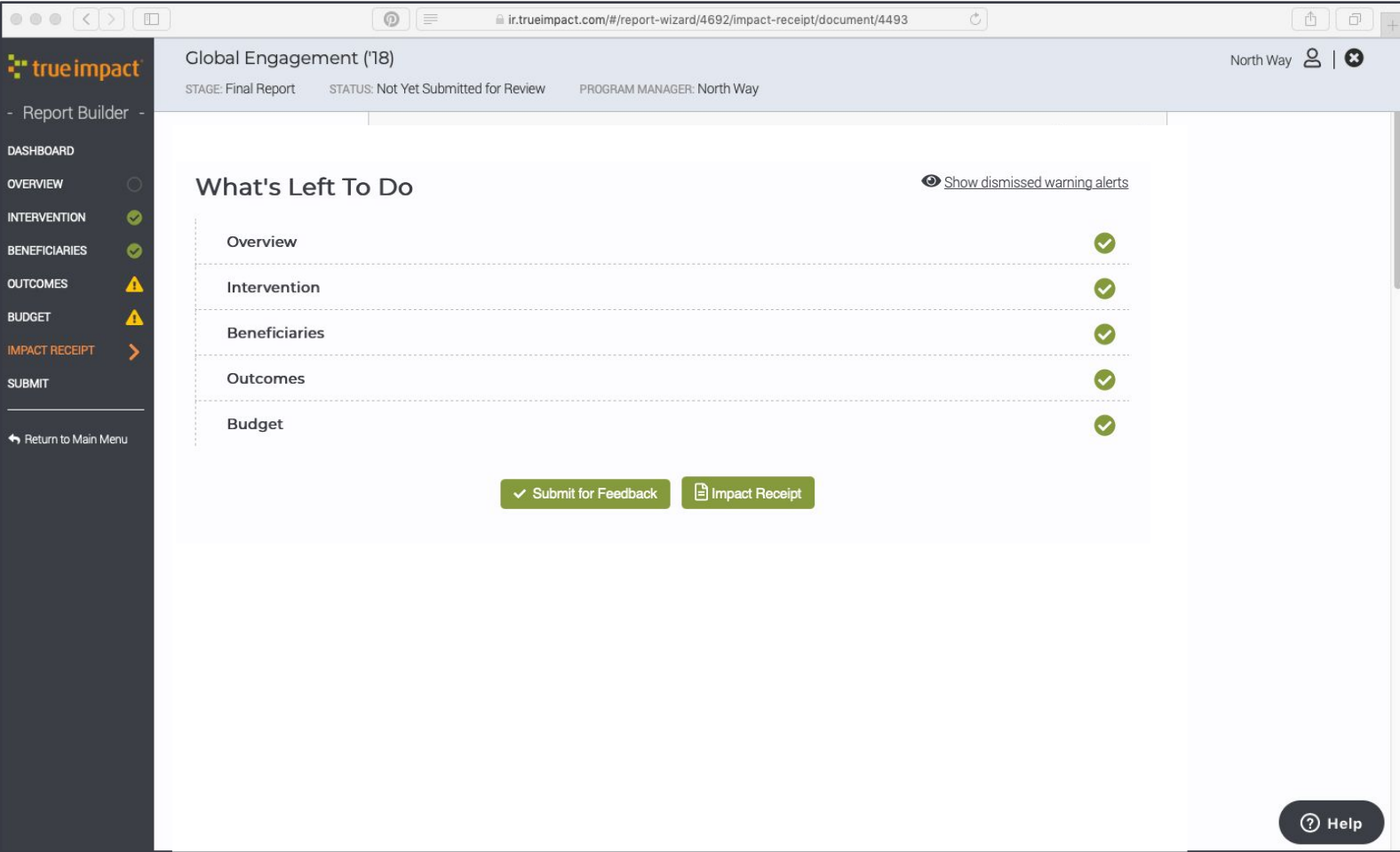
The dashboard is divided into sections with status indicators:

- Overview:**  Date Range: An end date is required. (Empty circle icon)
- Intervention:** (Green checkmark icon)
- Beneficiaries:** (Green checkmark icon)
- Outcomes:** (Yellow warning triangle icon) Indicators: Your Act number is equal to at least one of your previous indicator entries. Most programs are not 100% effective at each stage. Does your entry here merit adjustment?
- Budget:** (Red X icon) Total Cost: The value of the donations allocated to this program exceeds the budget. The budget must be increased and/or the value of allocated donations reduced.
- Custom Questions:** (Green checkmark icon)

At the bottom, there are two buttons: "Submit for Feedback" and "Impact Receipt". A red message states: "Some data you have entered needs to be updated. It cannot be submitted as is. Check above to see what section has errors." A "Help" button is in the bottom right corner.

# Update Fields, Resolve Errors, and Submit

 Submit button becomes active when all sections are complete



The screenshot shows the True Impact report wizard interface. The browser address bar displays `ir.trueimpact.com/#/report-wizard/4692/impact-receipt/document/4493`. The page title is "Global Engagement ('18)". The status is "Final Report" and "Not Yet Submitted for Review". The program manager is "North Way".

The left sidebar contains the following navigation items:

- Report Builder
- DASHBOARD
- OVERVIEW
- INTERVENTION
- BENEFICIARIES
- OUTCOMES
- BUDGET
- IMPACT RECEIPT
- SUBMIT
- Return to Main Menu

The main content area is titled "What's Left To Do" and lists the following sections with their completion status:

Section	Status
Overview	Complete (Green Checkmark)
Intervention	Complete (Green Checkmark)
Beneficiaries	Complete (Green Checkmark)
Outcomes	Complete (Green Checkmark)
Budget	Complete (Green Checkmark)

At the bottom of the main content area, there are two buttons: "Submit for Feedback" (with a green checkmark icon) and "Impact Receipt". A "Help" button is located in the bottom right corner.

- 01 Overview ✓ Do my dates represent program implementation?
- 02 Intervention ✓ Can an outside reader understand what the program does?
- 03 Beneficiary ✓ Have I represented who ultimately benefits from this work?
- 04 Outcomes
  - Relevant ✓ Do the indicators selected reflect the outcomes of my program?
  - Program Development ✓ Have I represented the new programs, resources, and implementers developed?
  - Reach ✓ Who my end beneficiary is, what they receive, and when they are engaged?
  - Learn ✓ Is my learn indicator specific and not duplicative of participation?
  - Act ✓ Is my Act indicator unique and represent a change in behavior?
  - Succeed ✓ Do positive social, economic, or environmental outcomes align with my program mission or end goals?
- 05 Documentation ✓ Can I provide more depth and context with an annual or program report?
- 06 Budget ✓ Does this represent how much it costs to enable the reported outcomes?



# Updating a Report

# Login to Your Account

Once True Impact completes feedback, return to update your report, resolve feedback, and submit for verification.

## True Impact Report Feedback

Hi Sadie,

Teaching for Equity and Inclusion has received feedback. Please log in to review the comments and make adjustments to your report as appropriate.

If you've forgotten your password, or if your user account was set up for you and you didn't receive a password), you can reset it here: [https://ir.trueimpact.com/?#/reset\\_login](https://ir.trueimpact.com/?#/reset_login)

Need help? Check how to resolve feedback on your Social Impact Report.

[View instructional video](#)

# Review Feedback

Click on the green Update button or orange comment icon to review feedback.

The screenshot shows a web browser window with the URL `ir.trueimpact.com/#/todo`. The dashboard has a dark sidebar with navigation options: true impact, TO DO (with a notification badge), REPORTS, REPORTS RATINGS, INVESTMENTS, ACCOUNT, and SIGN OUT. The main content area is divided into three sections:

- Funding Applications: 0**: All applications have been accepted!
- Investments to be allocated: 0**: All investments have been allocated!
- Reports to be submitted or published: 6**: A table with 3 rows and 3 columns.

Program or Initiative Name / Funding Term	Report Status	Content Status
1. SAMPLE Food Security Jul-01-2020 to Jun-30-2021	Final Report (TI Feedback Provided)	Overview ✓ Intervention ✓ Beneficiaries ✓ Outcomes ✓ Budget ✓ Narratives ✓ Update ✓
2. SAMPLE: Teaching Equity in the Classroom Jul-01-2021 to Jul-01-2022	Initial Report (TI Feedback Provided)	Overview ⚠ Intervention ✓ Beneficiaries ✓ Outcomes ✓ Budget ✓ Update ✓
3. Teaching for Equity and Justice Jul-01-2021 to Jul-30-2022	Initial Report (Not Yet Submitted for Review)	Overview ✓ Intervention ✓ Beneficiaries ✓ Update ✓

A comment icon is visible in the bottom right corner of the dashboard.



# Edit and Resolve Feedback

Review feedback, make edits, and resolve by checking each Feedback checkbox.

The screenshot displays the True Impact report wizard interface. The browser address bar shows the URL: `ir.trueimpact.com/#/report-wizard/7323/overview/name`. The page title is "Teaching Equity in the Classroom ('21 - '22)". The user is identified as "North Way". The report stage is "Initial Report", the status is "TI Feedback Provided", and the program manager is "Chelsea Takamine".

The main content area prompts the user to "Enter the name of the program you are reporting on". The entered name is "Teaching Equity in the Classroom". A feedback box indicates "Page entries are valid." Below the input field are four buttons: "Save & Back", "Save & Return to Dashboard", "Save & View Impact Receipt", and "Save & Next >".

On the right side, a blue sidebar titled "True Impact Feedback" contains a "MARK AS RESOLVED:" section with a checkbox and a yellow sun icon. The text next to the checkbox reads: "Please use the program's formal name, so it easily recognizable by people both inside your organization and externally." Below this is an "Additional Guidance" section with two expandable items: "Reporting on galas, dinners, or other fundraisers" and "When to create multiple reports". A "Close" button is located on the left side of the sidebar, and a chat icon is at the bottom right.

The left sidebar shows the navigation menu with the following items: "true impact", "Report Builder", "DASHBOARD", "OVERVIEW" (with sub-items: Name, Description, Date Range, Logo, Stage), "INTERVENTION", "BENEFICIARIES", "OUTCOMES", "BUDGET", "IMPACT RECEIPT", "SUBMIT", and "Return to Main Menu".

# Submit Updated Report

## Report progress

## Submit Page

Not Yet Submitted for Review

Submit for Feedback

Awaiting Feedback

Awaiting Feedback

### Feedback Provided

Submit

Awaiting Verification

Being Verified

Initial / Interim Published

Waiting...

Final Published

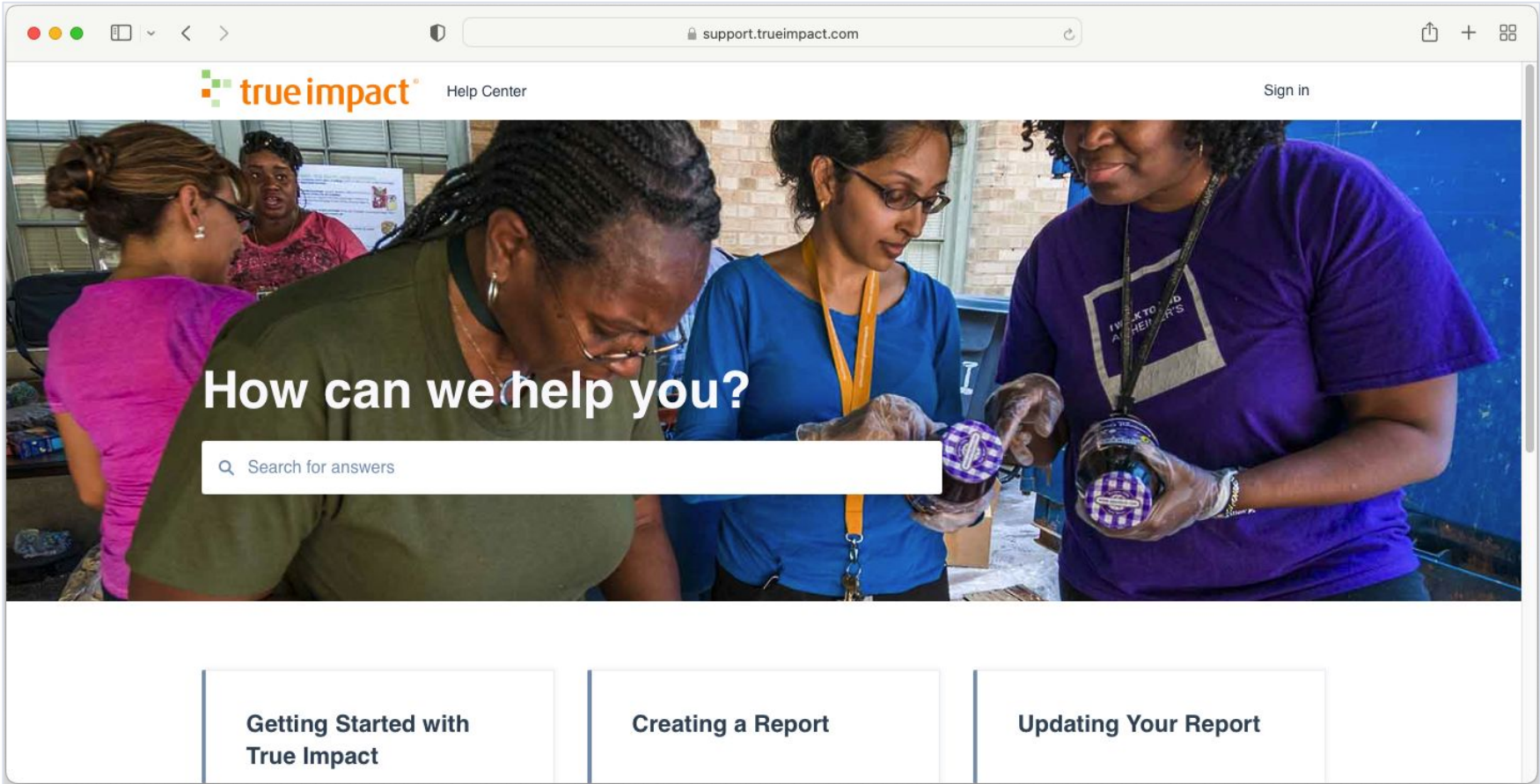
Finalize

Verified

Finalized

# Find Guides and Resources

Find additional guides and resources at [support.trueimpact.com](https://support.trueimpact.com).





# Keep in Touch



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