Report Builder Draft

Preparation Worksheet

Program name: | **Report year:**

How to use this worksheet

- **Drafting only.** Nothing here transfers to True Impact. Copy your answers into the report builder.
- **Save as you go.** This PDF does not autosave. Download it first, then save often (File > Save).

→ **Full help center resources for nonprofits**
→ **Top 5 reporting tips**
→ **Use AI to complete your draft report**

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→ Reference (A–F): full option lists

1 · Description

How would you describe your program to a new prospective donor?

Try: "We help [beneficiaries] achieve [outcome] by providing [services]." Minimum 150, maximum 900 characters.

2 · Dates

Set your reporting period. Fill in what matches your program — the platform handles the routing.

How long has your program been running?	How does your program run?
☐ First year ☐ Multiple years	☐ Continuously (no set dates) ☐ Scheduled (set dates)
If continuous — select your reporting term	**If scheduled — start & end dates**
☐ Calendar ☐ Academic ☐ Fiscal ☐ Custom *(use date selector to the right if selected)*	Report Start Date: Report End Date:

→ What time period should my report cover?

3 · Location

Add one row per location. Do not combine cities, counties, states, or a regional name into a single row. Add rows as needed. Percentages reflect the share of people served and must total 100%

Location (city, state, country, or address)	% served
	%
	%
	%
	%
	%
	%
	%

4 · Activities

Step 1 — Delivery type & intervention

Primary *= your main way of delivering services.* ***Secondary*** *= an additional way, if any (optional).*

Delivery type (pick one):

- ☐ Direct Service
- ☐ Capacity Development
- ☐ Policy & Advocacy

Primary intervention:

Secondary intervention (optional):

→ **See** Reference A *for the intervention options under each delivery type.*

Step 2 — Dosage (frequency, duration & value)

Frequency and overall duration are asked for every program. The "intensity" measure depends on the intervention you chose in Step 1 — fill it in using the scale for your intervention (see Reference B).

Measure	Applies to	Your answer
Frequency *How many times a beneficiary engages.*	All programs	☐ Once ☐ 2–4 ☐ 5–10 ☐ 11+
Intensity *Value, length, or time per engagement.*	Varies by intervention — see Reference B	
Overall duration *How long a beneficiary is served.*	All programs	☐ 1 day ☐ Multiple days ☐ Multiple weeks ☐ Multiple months

Add any additional information about your core service, activity or strategy (optional):
Maximum of 500 characters

5 · Impact Model

Build your model (cause → stages → indicators), then detail each indicator you choose.

→ What is the impact model True Impact uses?

Step 1 — Cause category & impact model

Cause category: **Impact model:**

→ **See** Reference C *for the catalog of cause categories and their impact models.*

Step 2 — Beneficiary term

Who are your ultimate **end beneficiaries**?

Pick one from the list below, exactly as written. You cannot add your own. If nothing fits well, pick the closest and explain in the notes field at the end of this section.

☐ Participants	☐ Youth	☐ Family Members	☐ Adults
☐ Seniors	☐ Patients	☐ Community members	☐ Clients
☐ Organizations	☐ Animals	☐ Businesses	☐ Students
☐ Teachers / Educators	☐ Volunteers	☐ Caregivers	

How do you serve them:

☐ Directly

☐ Indirectly Intermediary term (if indirect), also from the list above:

Step 3 — Choose your stages

Which stages will you include in your impact model?

- ☐ Program Development
- ☐ Reach *(required)*
- ☐ Learn
- ☐ Act
- ☐ Succeed *(required)*

→ **See** Reference D *for indicators by stage, and* Reference E *for Succeed indicators by cause. List the ones you'll report in Step 4*

Step 4 — Build out each indicator

One row per indicator. For each, define it, give a number, and note how you measured it. Rows are pre-filled to the recommended counts (Program Dev up to 3, Succeed up to 5).

Model stage	Indicator *What you achieve at this stage*	Define it *What it means for your program (max of 250 characters)*	Number *Forecast or final result*	Measurement type *See Reference F for the full list of measurement types by stage*	How measured *Data source / method (max of 250 characters)*
Program Dev. *(Optional)*					
Program Dev. *(Optional)*					
Reach					
Learn *(Optional)*					
Act *(Optional)*					
Succeed					
Succeed					
Succeed					

→ Mapping your impact model into True Impact
→ Improving data quality
→ Examples of completed impact models

Add notes that provide context for your impact model (optional)

Maximum of 500 characters

6 · Demographics

Fill in only the categories relevant to your program, or opt out below if you don't collect demographic data.

→ Demographic category definitions

☐ Opt out: we don't collect demographic data for this program

Demographic category	% of those reached
Age Groups	
All Adults (19+)	%
→ Adults (19–63)	%
→ Seniors (64+)	%
All Children (0–18)	%
→ Children (0–9)	%
→ Youth (10–18)	%
Ethnic & Racial Groups	
Indigenous peoples	%
Multiracial people	%
African descent	%
Asian descent	%
European descent	%
Latin American descent	%
Middle Eastern descent	%
Gender & Sexuality	
Women and girls	%
Men and boys	%
LGBTQIA+	%
Health & Disability	
People with disabilities	%
Diseases and illnesses	%
Substance use disorder	%
Social & Economic Status	
Immigrants and migrants	%

Economically disadvantaged	%
Homeless people	%
Victims and oppressed people	%
Incarcerated people	%
Work Status & Occupations	
Artists and performers	%
Domestic workers	%
Emergency responders	%
Farmers	%
Military personnel	%
Retired people	%
Self-employed people	%
Students	%
Teachers	%
Unemployed people	%
Veterans	%

Briefly provide any additional descriptive information on the beneficiaries served (optional)

Maximum of 500 characters

7 · Budget

Your full program budget for the report year. Direct costs are required; overhead and in-kind are optional (mark "not relevant" if they don't apply).

Budget item	Amount ($)
Direct program costs *(required)* *Staffing, programming, direct service delivery*	$
Overhead costs *(optional)* *Admin, rent, utilities allocated to this program*	$
Total in-kind donations *(optional)* *Volunteer hours, donated goods or services*	$
Total program budget	**$**

Would you like to upload any documents or provide additional information to support your budget numbers?

This isn't required but can be helpful to have this information saved to provide context or year-over-year analysis. Do not include funder or donor names here. Reports containing donor names are flagged. Maximum of 500 characters

8 · Narratives (final reports only)

Only for final reports — not for reports forecasting outcomes that aren't yet complete.

Success story — headline

Attention-grabbing title, under 80 characters.

Success story — body

A few sentences to a short paragraph. Max 900 characters. You'll upload a photo on the platform (JPEG or PNG).

Lesson learned — category

- ☐ Planning
- ☐ Training
- ☐ Implementation
- ☐ Measurement & Reporting
- ☐ Stakeholder Management
- ☐ Donor Relations
- ☐ Other

Lesson learned — describe

A challenge, insight, or advice. Max 900 characters.

Ready to submit? Enter this information into the Report Builder online. Questions? Visit the Help Center.

Reference

The full option lists. Use these while filling in Sections 4 and 5 — you don't need to read them front to back.

Reference A — Intervention options by delivery type

Delivery type	Intervention options
Direct Service *Delivers services, goods, or training directly to beneficiaries.*	▸ Distribution of food ▸ Distribution of clothing, shelter, and other non-food basic needs ▸ Grants or scholarships for education, training, or other services ▸ Advertising, public service announcements, or social marketing ▸ Individual supports, training, education ▸ Leadership and professional development ▸ Exhibits or performances ▸ Conferences or convenings
Capacity Development *Builds the capacity of organizations, communities, or systems.*	▸ Network-building, conferences, and collaborations ▸ Technical assistance, professional and leadership development ▸ Direct stakeholder engagement and education ▸ Presentations, exhibits, and online media ▸ Research and evaluation ▸ Infrastructure, equipment, land development ▸ Product and service development ▸ Program and curriculum development
Policy & Advocacy *Influences laws, policies, or public behavior at a systems level.*	▸ Advertising, public service announcements, or social marketing ▸ Direct engagement (education, advocacy) with policy makers ▸ Direct engagement (education, advocacy) with the public ▸ Community organizing and coalition building ▸ Fundraising ▸ Litigation

Reference B — Dosage questions by intervention

Frequency (number of times) and overall duration are asked for every program. The intensity measure below is the part that depends on your intervention:

If your intervention is…	Intensity measure & scale
▸ Distribution of food / clothing / basic needs ▸ grants or scholarships ▸ infrastructure, equipment, land development	**Value provided or built** ▸ <$100 ▸ $101–500 ▸ $501–1,000 ▸ $1,000–5,000 ▸ $5,000–10,000 ▸ $10,000–25,000 ▸ $25,000+

▸ Individual supports / training ▸ leadership & professional development ▸ exhibits or performances ▸ conferences or convenings ▸ technical assistance ▸ direct stakeholder engagement ▸ presentations & online media ▸ advertising, PSAs, or social marketing	**Length of each session, event, or message** ▸ <10 min ▸ 10–30 min ▸ 30 min–1.5 hr ▸ 1.5–4 hr ▸ 4–8 hr ▸ 8+ hr
▸ Network-building & collaborations ▸ research and evaluation ▸ product / service development ▸ program / curriculum development ▸ policy & advocacy (policy makers, public, community organizing, fundraising, litigation)	**Cumulative time each participant dedicates** ▸ <1 day ▸ 1–7 days ▸ 7 days–4 weeks ▸ 1–6 months ▸ 6–12 months ▸ 12+ months

Reference C — Cause categories & impact models

Cause Category	Impact Models available
Arts & Culture	▸ Arts and Culture ▸ Cultural Preservation
Community & Economic Development	▸ Civic Engagement & Advocacy ▸ Community Revitalization ▸ Community Economic Development ▸ Community Resiliency ▸ Financial Inclusion ▸ Inclusive Entrepreneurship ▸ Small Business & Nonprofit Support ▸ Transit and Mobility ▸ Workforce Development
Disaster Management	▸ Disaster Preparation ▸ Disaster Response
Diversity, Equity, Inclusion & Access	▸ DEIA ▸ Gender Equity ▸ Human Rights ▸ Racial Justice
Education	▸ Early Childhood Development ▸ K–12 Classroom ▸ Out-of-School Programming ▸ Post-secondary & Career ▸ Educational Access ▸ Scholarships & Fellowships ▸ STEM K–12 ▸ STEM Out-of-School ▸ STEM Post-secondary ▸ Educator Training

Environment & Sustainability	▸ Environmental Conservation ▸ Recycling & Waste ▸ Sustainable Agriculture ▸ Sustainable Business ▸ Wildlife Conservation ▸ Domestic Animal Welfare
Food Security	▸ Community & School-Based Meals ▸ Food Distribution ▸ Growing and Harvesting
Health	▸ Health ▸ Health Education & Behavior Change ▸ Health Systems & Policy ▸ Recreation and Play ▸ Water, Sanitation & Hygiene
Housing & Human Services	▸ Affordable Housing ▸ Basic Needs ▸ Economic Security ▸ Emergency Housing
Public Safety	▸ Public Safety
Youth	▸ Positive Youth Development

Reference D — Available indicators by stage

Stage	Indicators
Program Development (optional · 0–3)	▸ Influencers are activated ▸ Infrastructures are developed or enhanced ▸ Organizations are created or expanded ▸ Partnerships or collaborations established ▸ Policies or laws are influenced ▸ Programs or services are created or enhanced ▸ Resources are developed ▸ Staff or implementers are hired or trained ▸ Trainings or events are held ▸ Volunteers are recruited or engaged
Reach (required)	▸ People are reached ▸ Acres of land are reached ▸ Animals are reached ▸ Meals are distributed ▸ Miles of riverway are reached ▸ Pounds of food are distributed ▸ Square miles of oceans are reached ▸ Trees are planted ▸ Businesses or organizations reached
Learn (optional)	▸ People gain skills, knowledge, or motivation

Act (optional)	▸ People take action or change behavior
Succeed (required · 1–5)	▸ See Reference E — Succeed indicators are organized by cause category.

Reference E — Succeed indicators by cause category

Choose 1–5 from the row matching your cause category.

Cause Category	Succeed indicators (choose 1–5)
Arts & Culture	▸ Become an artist / increase arts practice ▸ Expand vocation commitment ▸ Become cultural consumers ▸ Sustain or revitalize cultural heritage ▸ Gain fulfillment or enjoyment ▸ Dollars generated or saved ▸ Improve social/emotional well-being ▸ Improve academic performance ▸ Increase community pride ▸ Increase self-belief & identity ▸ Gain social networks & supports ▸ Protect or improve health ▸ Jobs created or saved
Community & Economic Development	▸ Dollars fundraised ▸ Community leaders activated ▸ Reduced commute times ▸ Businesses created/saved/strengthened ▸ Gain a livable-wage job ▸ Improve professional productivity ▸ Improve income ▸ Reduce costs / avoid lost income ▸ Save time ▸ Dollars generated or saved ▸ Strengthen civic engagement ▸ Gain financial strength ▸ Jobs created or saved ▸ Improved neighborhood satisfaction ▸ Vote ▸ Increase participation in decision-making ▸ Improve control of resources/assets ▸ Improve land rights/ownership ▸ Gain a new job ▸ Retain a job ▸ Become an advocate or patron ▸ Use formal financial accounts ▸ Achieve financial literacy ▸ Meet day-to-day financial needs
Diversity, Equity, Inclusion & Access	▸ Gain social networks & supports ▸ Gain welcoming/affirming environments ▸ Achieve a leadership position

	▸ Become a civic leader/advocate ▸ Fewer acts of intolerance ▸ Become an advocate of gender equity ▸ Gain a new job ▸ Retain a job ▸ Increase self-belief & identity ▸ Community leaders activated ▸ Increased safety
Education	▸ Read at grade level ▸ Progress to next grade on time ▸ Graduate high school ▸ Earn a post-secondary degree/credential ▸ Improve behavior ▸ Access post-secondary education ▸ Improve school attendance ▸ Gain school readiness ▸ Improve academic performance ▸ Gain a job ▸ Increase self-belief & identity
Environment & Sustainability	▸ Increase yields / reduce waste ▸ Dollars gained from income/reduced waste ▸ Pounds of food gained ▸ Pounds of materials recycled ▸ Benefit from protected/restored resources ▸ Animals protected/improved ▸ Ecosystems protected/restored ▸ Air-quality targets met ▸ Pollutants reduced ▸ Species protected/improved ▸ Acres of land protected/restored ▸ Oceans protected/restored ▸ Riverways protected/restored ▸ Gallons of water conserved ▸ kWhs generated ▸ kWhs saved ▸ Metric tons CO2e reduced
Food Security	▸ Achieve or improve food security ▸ Pounds of food recovered/reclaimed/redirected ▸ Protect or improve health ▸ Gain improved community resources
Health	▸ Protect or improve health ▸ Improve mental health ▸ Avoid relapse ▸ Improve social/emotional well-being ▸ Increased safety ▸ Avoid injury ▸ Gain social networks & supports

Housing & Human Services	▸ Age in place ▸ Homes increase in value ▸ Gain improved community resources ▸ Become a homeowner ▸ Gain temporary housing ▸ Gain long-term housing ▸ Retain housing ▸ Improve housing
Public Safety	▸ Increased safety ▸ Avoid injury ▸ Avoid conflict / reduce crime or violence ▸ Avoid recidivism
Youth	▸ Gain fulfillment or enjoyment ▸ Achieve key developmental milestones ▸ Increase self-belief & identity ▸ Improve social/emotional well-being ▸ Improve behavior ▸ Improve mental health ▸ Improve academic performance

Reference F — Measurement types

Program Development	Reach	Learn	Act	Succeed
Direct Measurement				
Staff or administrative project monitoring	Participant sign-in, attendance lists, or usage logs	People's self-reported learning (e.g., surveys, interviews, feedback forms)	People's self-reported behavior change (e.g., surveys, interviews, feedback forms)	People's self-reported impacts (e.g., surveys, interviews, feedback forms)
	Tracked data sources such as enrollment, member lists, etc.	A formal assessment of learning gains	A formal assessment of behavior change	A formal assessment of impact
			People's expected behavior change	
Estimate Based on Data				
Past program tracking	Tracked for this program in the past (but not currently measured)	Past program learning gains (but not currently measured)	Past program behavior change (but not currently measured)	Past program impacts (but not currently measured)
Improvements documented in similar programs	Published studies or data from similar programs	Published studies or data from similar programs with documented learning gains	Published studies or data from similar programs with documented behavior change	Published studies or data from similar programs with documented impacts
Extrapolated from partial or sampled data	Extrapolated from partial or sampled data	Extrapolated from partial or sampled data	Extrapolated from partial or sampled data	Extrapolated from partial or sampled data
Guess				
Based on assumptions with no supporting data	Based on assumptions with no supporting data	Based on assumptions with no supporting data	Based on assumptions with no supporting data	Based on assumptions with no supporting data