

ENGLISH FOR WORK / ENGLISH FOR MISSION-DRIVEN TEAMS

Nonprofit and NGO English

Make the mission understandable. Keep commitments grounded in evidence.



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Eight practical lessons. Eleven extended conversations.

Vocabulary, phrase banks, guided speaking, and explained answers.

Revised 2026 edition / Upper-intermediate to advanced

Your route through the book

01 Mission, Theory of Change, and Program Design, page 4

Explain the proposed pathway from a program activity to its intended result while distinguishing measured facts from assumptions.

02 Grant Proposals and Donor Restrictions, page 15

Request a grant variation by distinguishing organizational purpose, permitted expenditure, and the approval needed before spending.

03 Monitoring, Evaluation, and Learning, page 28

Report a before-and-after result with the correct population, measurement limits, and a proportionate learning conclusion.

04 Field Operations and Partner Coordination, page 39

Coordinate a date change by separating partner availability, community confirmation, transport arrangements, and the final go-ahead.

05 Safeguarding and Incident Reporting, page 51

Respond calmly to a concern, distinguish reported information from direct observation, and explain the designated reporting route without promising secrecy.

06 Volunteer Management and Training, page 64

Acknowledge a volunteer contribution while maintaining role boundaries, explaining the approval process, and arranging authorized cover.

07 Advocacy, Public Messaging, and Neutrality, page 78

Challenge an unsupported public claim, preserve the original population and time frame, and distinguish policy advocacy from party endorsement.

08 Board Reporting and Sustainability, page 89

Explain restricted cash, available funds, a simplified runway calculation, and the board decision needed before using a reserve buffer.

[Professional communication notes, page 3](#)

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Suggested study range: B2-C1. This is an editorial study range, not a certified proficiency assessment.

Respectful language. Accountable decisions.

Mission-driven work brings together communities, volunteers, partners, funders, and governing boards. These cases practice practical English for explaining evidence, sharing responsibility, maintaining appropriate boundaries, and making commitments that people can rely on.

Describe results at the level measured

Participation, learning, behavior, and longer-term outcomes answer different questions. Keep a genuine achievement visible without claiming a change that has not been measured.

"Two hundred people attended; sustained employment outcomes have not yet been measured."

Read the restriction before promising flexibility

A useful new activity may still fall outside the purpose or period of a grant. Check the agreement and the authorized change process before committing the funds.

"The activity fits our mission, but we still need to check whether this award can fund it."

Include communities in the coordination loop

A partner agreement does not mean that affected people have received, understood, or accepted a changed arrangement. Name who will communicate, confirm, and follow up.

"The partner can attend on the new date; the community contact has not yet confirmed it."

Treat trust as a responsibility

A concern, personal story, or contact detail should not become material for a general update. Use the appropriate reporting and information-sharing process, and explain its limits honestly.

"I will share the concern through the designated process, with the people who need to act."

Professional boundaries

All organizations, donors, communities, people, grants, statistics, dates, policies, and figures are fictional. This book teaches professional English, not legal, safeguarding, financial, or clinical procedures. Follow the applicable law, award terms, approved policies, and qualified advice. Charity Commission references apply to England and Wales; they are not universal rules for every nonprofit or NGO.

A Read the situation

LESSON 01 / MISSION, THEORY OF CHANGE, AND PROGRAM DESIGN

Explain the proposed pathway from a program activity to its intended result while distinguishing measured facts from assumptions.

Attendance is an achievement, not a lasting outcome

The fictional Pathway Project runs employment workshops. Its checked registration records show 200 distinct participants this quarter. The team has not measured employment after the workshops or whether any employment lasts. A donor update calls the attendance figure proof of lasting employment improvement. Program lead Nina and learning officer Joel must correct the claim while retaining the verified participation achievement. Their proposed pathway links workshops to stronger application skills, better job applications, and sustained employment, but those links and the necessary local job opportunities have not been established by the attendance records.

People: Nina, Program lead; Joel, Learning officer.

Read the record

Choose one answer per question using the facts above.

1. What do the checked records establish?

- A.** Local job opportunities increased because of the workshops.
- B.** 200 distinct people participated this quarter.
- C.** 200 people gained lasting employment.
- D.** Every participant improved application skills.

2. What has not been measured?

- A.** The quarter covered by the attendance record
- B.** Whether workshops took place
- C.** Post-workshop employment and its duration
- D.** The number of distinct participants

3. What should happen to the donor claim?

- A.** Retain participation and remove the unsupported lasting-employment conclusion.
- B.** Remove every mention of the verified achievement.
- C.** Treat attendance as proof of every later outcome.
- D.** Replace the figure with a larger estimate.

[Answers and explanations, page 119](#)

B Vocabulary in use

CORE TERMS

mission

The organization's central purpose and intended contribution.

articulate the mission

theory of change

An explanation of how actions are expected to produce change in a context.

test the theory of change

input

A resource used to deliver program work.

identify program inputs

output

A direct product or service delivered by program activity.

report program outputs

impact

A broader or longer-term effect, with its meaning defined for the evaluation.

define the intended impact

causal link

A proposed or established relationship in which one factor affects another.

examine a causal link

program design

The planned structure and delivery of an intervention.

refine the program design

results chain

A sequence linking resources, actions, and intended results.

map the results chain

activity

Work performed as part of a program.

specify the activities

outcome

A change experienced by the people or systems a program seeks to support.

measure outcomes

assumption

A condition or explanation taken as true for planning until tested.

test the assumptions

pathway

The proposed sequence through which change is expected to occur.

explain the pathway

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

mission MISSION

articulate the mission

Keep the meaning precise: The organization's central purpose and intended contribution.

activity ACTIVITY

specify the activities

Keep the meaning precise: Work performed as part of a program.

B Precision and professional shorthand

EXTEND YOUR RANGE

target group

The defined people a program intends to reach.
identify the target group

reach

The extent of contact or participation within a defined population.
document program reach

community input

Perspectives and knowledge supplied by the affected community.
incorporate community input

enabling condition

A circumstance that helps a proposed pathway work.
assess enabling conditions

baseline

A reference measurement taken before or at the start of a comparison.
establish a baseline

sustained employment

Employment continuing for a defined period under a specified measure.
define sustained employment

participant

A person taking part in a program activity.
count participants

needs assessment

A structured examination of priorities, gaps, and existing resources.
conduct a needs assessment

barrier

A factor that obstructs access, participation, or progress.
identify barriers

indicator

A defined measure used to track a relevant condition or result.
select an indicator

follow-up

Later contact or measurement after an activity.
arrange follow-up

learning question

A specific question guiding evidence collection and improvement.
frame a learning question

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

pathway **PATHWAY**

explain the pathway

Keep the meaning precise: The proposed sequence through which change is expected to occur.

community input **COMMUNITY INPUT**

incorporate community input

Keep the meaning precise: Perspectives and knowledge supplied by the affected community.

Phrases that move the work forward

Recognize the achievement

Two hundred distinct participants attended this quarter.

Limit the claim

It measures participation, not lasting employment.

Keep the link tentative

That is the proposed pathway, not a demonstrated result.

Define the endpoint

What duration will we mean by sustained employment?

Include community knowledge

Participants can help identify barriers that the workshop design misses.

Preserve the useful result

We can report the reach confidently without overstating the outcome.

Ask about measurement

Which indicator would show the next step in the pathway?

Plan proportionate follow-up

We should define the purpose and appropriate process before collecting more information.

Name the evidence

That figure comes from checked registration records.

Explain the intended pathway

We expect workshops to support stronger application skills.

Name the next step

We need evidence of skill use and later employment.

Identify an assumption

The pathway assumes relevant job opportunities are available.

Avoid an impact shortcut

Attendance alone does not establish the longer-term effect.

Correct the donor wording

Remove proof of lasting employment improvement from this update.

Separate ambition from evidence

The mission describes what we seek, not what this quarter's records prove.

Close the revision

State what we measured, what we hope to change, and what remains to be tested.

Precision in real exchanges

Purpose: Explain the intended pathway

Useful wording: We expect workshops to support stronger application skills.

Purpose: Keep the link tentative

Useful wording: That is the proposed pathway, not a demonstrated result.

D Choose the response that fits

Choose one response for each situation. Preserve the facts, the decision boundary, and the purpose of the exchange.

1. Which donor sentence is supported?

- A.** Every attendance proves a successful employment outcome.
- B.** The project eliminated local unemployment.
- C.** Two hundred distinct people attended this quarter; lasting employment outcomes have not yet been measured.
- D.** Two hundred people now have lasting jobs because of the project.

2. What does the proposed pathway do?

- A.** Guarantees jobs despite local labor-market conditions.
- B.** Explains how workshops might lead to skills, applications, and sustained employment.
- C.** Certifies that every link has already occurred.
- D.** Replaces follow-up evidence with a diagram.

3. A colleague needs the term for this meaning: A sequence linking resources, actions, and intended results. Which term fits?

- A.** results chain
- B.** baseline
- C.** reach
- D.** impact

D Choose the response that fits / continued

4. Rebuild the exchange from "Attendance is an achievement, not a lasting outcome". Nina: "Our idea is that better application skills lead to better applications and eventually to employment that lasts." Joel: [missing response] Nina: "Then we should show the steps between the workshop and the longer-term aim rather than jump straight from attendance to jobs." Which response belongs in the gap?

- A.** Include a learning question about whether participants use the application skills. That gives the team a practical next evidence task instead of treating the diagram as proof.
- B.** We can acknowledge the activity without overstating the evidence. Describe what we delivered and who participated, then distinguish the result we hope the work will support.
- C.** That is a theory of change. It makes the expected route understandable, but it does not prove that every link has occurred because people attended a session.
- D.** Yes, the results chain helps separate those steps. We need to know whether people developed the intended skills, used them in applications, and later obtained relevant work.

[Answers and explanations, page 119](#)

One useful distinction

Two hundred distinct participants is a verified reach figure in this case. It is not an employment count. Keep the achievement, the measurement period, and the unit intact instead of upgrading participation into a result the records do not contain.

Conversation

Attendance is an achievement, not a lasting outcome

Attendance is an achievement, not a lasting outcome

Complete the numbered gaps. Use each bank entry once; some entries contain several words.

WORD AND PHRASE BANK

reach / enabling condition / mission / sustained employment / learning question / activity / follow-up / results chain / theory of change / outcome

- 01 **Nina:** I can sign off the two hundred participants, but not proving lasting employment improvement. That phrase has crept into the donor update without any employment follow-up behind it.
- 02 **Joel:** The ¹ _____ is worth reporting. Two hundred distinct people attended this quarter. That is a real achievement, but the records do not tell us what happened to their employment afterward.
- 03 **Nina:** The team will ask why we are taking the success out of the update. We need to explain the correction without losing credit for the work they actually delivered.
- 04 **Joel:** We can acknowledge the ² _____ without overstating the evidence. Describe what we delivered and who participated, then distinguish the result we hope the work will support.
- 05 **Nina:** Our idea is that better application skills lead to better applications and eventually to employment that lasts.
- 06 **Joel:** That is a ³ _____. It makes the expected route understandable, but it does not prove that every link has occurred because people attended a session.

E Conversation / continued

- 07 **Nina:** Then we should show the steps between the workshop and the longer-term aim rather than jump straight from attendance to jobs.
- 08 **Joel:** Yes, the ⁴ _____ helps separate those steps. We need to know whether people developed the intended skills, used them in applications, and later obtained relevant work.
- 09 **Nina:** Some participants have told us that suitable jobs are difficult to find locally. That could affect the route even if their applications improve.
- 10 **Joel:** Job availability is an ⁵ _____ to examine. We should not imply that the workshop controls every labor-market factor or that a participant is responsible for every barrier they encounter.

Conversation continues on the next page.

Attendance is an achievement, not a lasting outcome

CONVERSATION / CONTINUED

- 11 **Nina:** We also use lasting and sustained as if they have an obvious meaning. We have not agreed a period.
- 12 **Joel:** Define ⁶ _____ before presenting it as a measured result. A job reported once and employment maintained for a defined period are different pieces of information.
- 13 **Nina:** We could plan a later check, but we should be clear about why we need the information and how it will be handled.
- 14 **Joel:** A proportionate ⁷ _____ can address that gap. Define the purpose, measure, timing, and appropriate participation and information-handling arrangements before collecting extra personal details.
- 15 **Nina:** What should the current update say while that work is still being designed?
- 16 **Joel:** Report participation as the observed result and describe the intended ⁸ _____ as an aim. Remove the phrase proving lasting employment improvement, because it claims evidence that this quarter's attendance record does not contain.
- 17 **Nina:** I will keep the two-hundred-person figure and explain the proposed skills-to-employment pathway separately, with the assumptions visible.
- 18 **Joel:** Include a ⁹ _____ about whether participants use the application skills. That gives the team a practical next evidence task instead of treating the diagram as proof.
- 19 **Nina:** The donor can then see both the achievement and the remaining work, without assuming the program has already demonstrated its long-term effect.
- 20 **Joel:** Exactly. Our ¹⁰ _____ remains ambitious. The reporting becomes more credible when it states what we measured, what we seek to change, and which links still need to be tested.

CHECK THE GAPS

1. reach / 2. activity / 3. theory of change / 4. results chain / 5. enabling condition / 6. sustained employment / 7. follow-up / 8. outcome / 9. learning question / 10. mission

[Why these answers fit, page 120](#)

F Check accuracy and scope

Attendance is an achievement, not a lasting outcome

Return to the case

The fictional Pathway Project runs employment workshops. Its checked registration records show 200 distinct participants this quarter. The team has not measured employment after the workshops or whether any employment lasts. A donor update calls the attendance figure proof of lasting employment improvement. Program lead Nina and learning officer Joel must correct the claim while retaining the verified participation achievement. Their proposed pathway links workshops to stronger application skills, better job applications, and sustained employment, but those links and the necessary local job opportunities have not been established by the attendance records.

Choose one answer per question. Use the case facts and keep any uncertainty or limits intact.

1. Which question makes sustained employment more measurable?

- A. What period and employment definition will the indicator use?
- B. How many workshop places were available in the quarter?
- C. How many people requested a second workshop?
- D. What proportion of participants rated the facilitator highly?

2. Which factor is an enabling condition rather than a verified workshop result?

- A. The recorded quarter of participation
- B. Availability of relevant job opportunities
- C. The checked count of 200 participants
- D. The completed registration review

[Answers and explanations, page 122](#)

Listen for the distinction

Swap roles for turns 11-20 and separate the mission from the result already measured.

Protect the achievement without overstating it

Staff may hear a challenge to an impact claim as a dismissal of their effort. Acknowledge the verified reach, then explain the additional evidence needed for the stronger claim. A clear program pathway can motivate learning without pretending the hoped-for result has already occurred.

F Say it / transfer to a new case

Keep another participation claim accurate

A mentoring project records 90 distinct participants in April. It has not measured later qualifications. Its proposed pathway links mentoring to study habits and then course completion.

Complete the four gaps. With a partner, read alternate roles, then switch. Studying alone, read both roles and pause before each response.

WORD AND PHRASE BANK

study habits / 90 / April / not been measured

- 01 **Lead:** The verified number of distinct participants is ¹ _____.
- 02 **Officer:** The measurement period is ² _____.
- 03 **Lead:** The proposed intermediate change is ³ _____.
- 04 **Officer:** Later qualifications have ⁴ _____.

CHECK THE GAPS

1. 90 / 2. April / 3. study habits / 4. not been measured

[Why these answers fit, page 122](#)

Rebuild the exchange

Choose the missing response. Read the completed three-turn exchange aloud, changing roles on the second reading.

1. Rebuild the exchange from "Attendance is an achievement, not a lasting outcome".
Nina: "We could plan a later check, but we should be clear about why we need the information and how it will be handled." **Joel:** [missing response] **Nina:** "What should the current update say while that work is still being designed?" **Which response belongs in the gap?**

- A.** A proportionate follow-up can address that gap. Define the purpose, measure, timing, and appropriate participation and information-handling arrangements before collecting extra personal details.
- B.** We can acknowledge the activity without overstating the evidence. Describe what we delivered and who participated, then distinguish the result we hope the work will support.
- C.** Define sustained employment before presenting it as a measured result. A job reported once and employment maintained for a defined period are different pieces of information.
- D.** That is a theory of change. It makes the expected route understandable, but it does not prove that every link has occurred because people attended a session.

[Answers and explanations, page 123](#)

A Read the situation

LESSON 02 / GRANT PROPOSALS AND DONOR RESTRICTIONS

Request a grant variation by distinguishing organizational purpose, permitted expenditure, and the approval needed before spending.

Mission fit does not change the grant agreement

Grant N14 provides \$30,000 for after-school reading sessions and approved reading materials. There is \$6,000 unspent. Program manager Amir proposes moving \$3,000 to a food-outreach activity. Grants officer Leah checks the signed agreement: spending on a different activity requires a written amendment signed by the authorized representatives before commitment. A donor contact has informally called the food idea worthwhile, but no amendment exists. Amir and Leah must prepare a specific variation request without treating unspent money, mission alignment, or informal encouragement as permission to redirect the grant.

People: Amir, Program manager; Leah, Grants officer.

Read the record

Choose one answer per question using the facts above.

1. What activity does N14 currently fund?

- A.** Food outreach without an amendment
- B.** All staff travel regardless of purpose
- C.** After-school reading sessions and approved reading materials
- D.** Any activity the organization supports

2. What does the proposed \$3,000 transfer require?

- A.** A revised internal spreadsheet after spending
- B.** A written amendment signed by authorized representatives before commitment
- C.** Only the fact that \$6,000 remains
- D.** An informal positive comment from any donor contact

3. What has the donor contact actually done?

- A.** Approved every future food-outreach cost
- B.** Called the idea worthwhile without approving an amendment
- C.** Signed the required amendment
- D.** Removed all award restrictions

[Answers and explanations, page 124](#)

B Vocabulary in use

CORE TERMS

restricted grant

Funding limited to specified uses or conditions.

review the restricted grant

award agreement

The document setting the grant's terms and responsibilities.

check the award agreement

purpose restriction

A limit specifying the activity or aim for which funds may be used.

observe the purpose restriction

budget line

A specific category in an approved budget.

identify the budget line

variation request

A request to change an agreed scope, budget, or condition.

submit a variation request

authorized representative

A person empowered to act for an organization in the relevant matter.

identify authorized representatives

unrestricted funding

Funding available for the organization's permitted purposes without the stated donor-use restriction.

seek unrestricted funding

permitted expenditure

Spending allowed under the relevant terms.

verify permitted expenditure

unspent balance

Award money not yet spent, which may still carry restrictions.

reconcile the unspent balance

budget transfer

Movement of an allocation between budget categories or activities.

request a budget transfer

amendment

An authorized change to an existing agreement.

execute an amendment

prior approval

Permission obtained before the specified action is taken.

obtain prior approval

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

restricted grant RESTRICTED GRANT

review the restricted grant

Keep the meaning precise: Funding limited to specified uses or conditions.

unspent balance UNSPENT BALANCE

reconcile the unspent balance

Keep the meaning precise: Award money not yet spent, which may still carry restrictions.

B Precision and professional shorthand

EXTEND YOUR RANGE

commitment

An action creating an obligation or promise to use resources.

avoid an unauthorized commitment

funding rationale

The explanation supporting a request for financial support.

clarify the funding rationale

award period

The time span during which the grant's defined work or costs apply.

check the award period

reporting obligation

A requirement to provide specified information to the funder.

meet reporting obligations

delegated authority

Decision power assigned to a person or role within defined limits.

verify delegated authority

funding gap

A shortfall between required and available permitted resources.

identify the funding gap

concept note

A concise description of a proposed project or change.

prepare a concept note

deliverable

A specified output or item promised under an agreement.

revise the deliverables

milestone

A defined stage used to track delivery.

update the milestones

donor contact

The person communicating with the organization on the donor's behalf.

confirm the donor contact

mission alignment

Consistency with the organization's overall purpose.

explain mission alignment

approval record

Documentation of the decision and its authorized scope.

retain the approval record

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

prior approval PRIOR APPROVAL

obtain prior approval

Keep the meaning precise: Permission obtained before the specified action is taken.

award period AWARD PERIOD

check the award period

Keep the meaning precise: The time span during which the grant's defined work or costs apply.

Phrases that move the work forward

Acknowledge the need

The food-outreach idea addresses a real program concern.

State the balance

Six thousand dollars remains unspent.

Quantify the request

We propose reallocating three thousand dollars.

Separate encouragement

The donor contact's positive comment is not the required approval.

Describe the change

The request should state the new activity, amount, timing, and delivery effect.

Avoid premature spending

Do not commit the proposed amount while approval is pending.

Check the full conditions

We also need to review the award period and reporting implications.

Close the request

Ask for a clear decision on the specified variation.

Identify the restriction

N14 currently funds reading sessions and approved reading materials.

Limit the inference

Unspent funds are not automatically available for another activity.

Check the agreement

The signed terms require a written amendment before commitment.

Confirm authority

Who is authorized to sign the amendment for each organization?

Preserve the original promise

Explain how the change would affect the reading-program deliverables.

Record the status

The variation has been requested, not approved.

Offer another route

We can assess other permitted funding without assuming it is available.

Retain the evidence

Keep the executed amendment with the award and approval records.

Precision in real exchanges

Purpose: Limit the inference

Useful wording: Unspent funds are not automatically available for another activity.

Purpose: Quantify the request

Useful wording: We propose reallocating three thousand dollars.

D Choose the response that fits

Choose one response for each situation. Preserve the facts, the decision boundary, and the purpose of the exchange.

1. Which statement about the balance is accurate?

- A.** The \$6,000 remains subject to N14's terms.
- B.** The \$6,000 becomes unrestricted at quarter-end automatically.
- C.** Any unspent amount can fund food outreach.
- D.** Half the balance can always be moved without review.

2. What should the variation request include?

- A.** A completed purchase followed by a request
- B.** Amount, purpose, timing, and effects on agreed deliverables
- C.** Only a statement that the team likes the idea
- D.** A claim that approval already exists

3. A colleague needs the term for this meaning: Spending allowed under the relevant terms. Which term fits?

- A.** delegated authority
- B.** funding rationale
- C.** variation request
- D.** permitted expenditure

D Choose the response that fits / continued

4. Rebuild the exchange from "Mission fit does not change the grant agreement". Amir: "What does the agreement actually require if we want to move part of the remaining balance?" Leah: [missing response] Amir: "I had thought an unspent amount was easier to move because it had not yet been used for the reading sessions." Which response belongs in the gap?

- A.** We must verify the authorized representative for each organization. A familiar contact may help route the request without holding the signing authority needed to approve it.
- B.** A written amendment signed by the authorized representatives before commitment to a different activity. We do not have that amendment, so the proposed transfer is not approved.
- C.** Exactly. Show the effect on each relevant deliverable. The donor needs a truthful picture of what would change and what would remain, not two incompatible sets of promises.
- D.** The unspent balance still carries the grant conditions. Six thousand remaining tells us the amount unused, not the purposes for which we may now spend it.

[Answers and explanations, page 124](#)

One useful distinction

Unspent does not mean unrestricted. The \$6,000 retains the agreement's restrictions, and the proposed transfer is half that balance. The signed N14 terms, not a general view that the new activity is worthwhile, determine the stated approval requirement.

E Conversation

Mission fit does not change the grant agreement

Mission fit does not change the grant agreement

Complete the numbered gaps. Use each bank entry once; some entries contain several words.

WORD AND PHRASE BANK

authorized representative / purpose restriction / written amendment / deliverable /
variation request / unspent balance / commitment / permitted expenditure /
mission alignment / approval record

- 01 **Amir:** There is six thousand left in N14, and the food team needs three. Before I promise anything, can we check whether this award can cover the change?
- 02 **Leah:** First check the ¹ _____. The signed agreement funds after-school reading sessions and approved reading materials. Food outreach is a different activity, even if it fits our wider mission.
- 03 **Amir:** The donor contact said the idea was worthwhile when I mentioned it last week. I took that as a positive sign.
- 04 **Leah:** It is encouraging, but ² _____ and informal support do not change the award terms. We need to distinguish liking the proposal from authorizing this grant to pay for it.
- 05 **Amir:** What does the agreement actually require if we want to move part of the remaining balance?
- 06 **Leah:** A ³ _____ signed by the authorized representatives before commitment to a different activity. We do not have that amendment, so the proposed transfer is not approved.

E Conversation / continued

- 07 **Amir:** I had thought an unspent amount was easier to move because it had not yet been used for the reading sessions.
- 08 **Leah:** The ⁴ _____ still carries the grant conditions. Six thousand remaining tells us the amount unused, not the purposes for which we may now spend it.
- 09 **Amir:** Then I should prepare a request for three thousand and explain why we want to change the activity.
- 10 **Leah:** Yes, a specific ⁵ _____. Include the amount, proposed work, timing, and the effect on the reading-program commitments, so the donor can assess the actual change rather than a vague idea.

Conversation continues on the next page.

Mission fit does not change the grant agreement

CONVERSATION / CONTINUED

- 11 **Amir:** We would need to explain whether fewer reading sessions or fewer materials would result. I should not leave the original promise untouched on paper.
- 12 **Leah:** Exactly. Show the effect on each relevant ⁶ _____. The donor needs a truthful picture of what would change and what would remain, not two incompatible sets of promises.
- 13 **Amir:** Can the contact who encouraged the idea sign the amendment, or does it need someone else?
- 14 **Leah:** We must verify the ⁷ _____ for each organization. A familiar contact may help route the request without holding the signing authority needed to approve it.
- 15 **Amir:** They are asking for a deposit today to hold the supplies. I have not agreed. Does a small reservation payment still count as committing the grant?
- 16 **Leah:** Do not create a ⁸ _____ from this proposed transfer while approval is pending. A deposit can still obligate resources. We should not promise the funds before the specified process is complete.
- 17 **Amir:** I will tell them that the variation is being requested, not that the donor has approved it. We can also check other funding options.
- 18 **Leah:** That is the right status. Any alternative ⁹ _____ needs its own review under the relevant source. We should not solve one restricted-funding problem by assuming another pot has no conditions.
- 19 **Amir:** Once the decision arrives, I will update the activity plan and the reporting arrangements to match the approved position.
- 20 **Leah:** Retain the ¹⁰ _____ and executed amendment with N14. Then the program and finance teams can act on the same documented terms rather than different memories of a conversation.

CHECK THE GAPS

1. purpose restriction / 2. mission alignment / 3. written amendment / 4. unspent balance / 5. variation request / 6. deliverable / 7. authorized representative / 8. commitment / 9. permitted expenditure / 10. approval record

[Why these answers fit, page 125](#)

F Check accuracy and scope

Mission fit does not change the grant agreement

Return to the case

Grant N14 provides \$30,000 for after-school reading sessions and approved reading materials. There is \$6,000 unspent. Program manager Amir proposes moving \$3,000 to a food-outreach activity. Grants officer Leah checks the signed agreement: spending on a different activity requires a written amendment signed by the authorized representatives before commitment. A donor contact has informally called the food idea worthwhile, but no amendment exists. Amir and Leah must prepare a specific variation request without treating unspent money, mission alignment, or informal encouragement as permission to redirect the grant.

Choose one answer per question. Use the case facts and keep any uncertainty or limits intact.

1. Which message overstates the donor contact's response?

- A. The donor approved the amendment by calling the idea worthwhile.
- B. The contact expressed support for the idea.
- C. We still need the authorized signatures.
- D. No executed amendment is on file.

2. What is the supported spending status?

- A. Change the ledger after payment to create permission.
- B. Treat mission alignment as delegated signing authority.
- C. Do not commit the transfer until the required amendment is executed.
- D. Spend first because the purpose is charitable.

[Answers and explanations, page 127](#)

Listen for the distinction

Swap roles for turns 11-20; stress before commitment when discussing the deposit.

Separate enthusiasm from authorization

Donors and staff may support an idea without having approved its funding. Acknowledge the shared aim, then name the award restriction and the actual change process. A clear request makes it easier to respond without forcing a friendly comment into a contractual commitment.

F Say it / transfer to a new case

State another proposed grant variation

Award L8 funds adult-literacy classes. Of \$8,000 unspent, the team proposes \$2,000 for a transport activity. Its signed terms require a written amendment before commitment. No amendment has been signed.

Complete the four gaps. With a partner, read alternate roles, then switch. Studying alone, read both roles and pause before each response.

WORD AND PHRASE BANK

adult-literacy classes / \$2,000 / written amendment / \$8,000

- 01 **Manager:** The existing funded activity is ¹ _____.
- 02 **Officer:** The unspent balance is ² _____.
- 03 **Manager:** The proposed transfer is ³ _____.
- 04 **Officer:** The required approval document is a ⁴ _____.

CHECK THE GAPS

1. adult-literacy classes / 2. \$8,000 / 3. \$2,000 / 4. written amendment

[Why these answers fit, page 127](#)

Rebuild the exchange

Choose the missing response. Read the completed three-turn exchange aloud, changing roles on the second reading.

1. Rebuild the exchange from "Mission fit does not change the grant agreement". Amir: "Can the contact who encouraged the idea sign the amendment, or does it need someone else?" Leah: [missing response] Amir: "They are asking for a deposit today to hold the supplies. I have not agreed. Does a small reservation payment still count as committing the grant?" Which response belongs in the gap?

- A.** The unspent balance still carries the grant conditions. Six thousand remaining tells us the amount unused, not the purposes for which we may now spend it.
- B.** Exactly. Show the effect on each relevant deliverable. The donor needs a truthful picture of what would change and what would remain, not two incompatible sets of promises.
- C.** We must verify the authorized representative for each organization. A familiar contact may help route the request without holding the signing authority needed to approve it.
- D.** A written amendment signed by the authorized representatives before commitment to a different activity. We do not have that amendment, so the proposed transfer is not approved.

[Answers and explanations, page 128](#)

Review 1 / Meaning and context

Use language from the lessons you have completed. Choose one answer per question.

Case file

Revisit "Mission, Theory of Change, and Program Design" and "Grant Proposals and Donor Restrictions". Choose precise terminology, then reconstruct the missing responses using both neighboring turns. The final two questions also revisit earlier conversations.

1. A colleague needs the term for this meaning: An explanation of how actions are expected to produce change in a context. Which term fits?

- A. participant
- B. theory of change
- C. outcome
- D. indicator

2. A colleague needs the term for this meaning: Movement of an allocation between budget categories or activities. Which term fits?

- A. restricted grant
- B. reporting obligation
- C. budget transfer
- D. commitment

3. Rebuild the exchange from "Attendance is an achievement, not a lasting outcome". Nina: "Some participants have told us that suitable jobs are difficult to find locally. That could affect the route even if their applications improve." Joel: [missing response] Nina: "We also use lasting and sustained as if they have an obvious meaning. We have not agreed a period." Which response belongs in the gap?

- A. Job availability is an enabling condition to examine. We should not imply that the workshop controls every labor-market factor or that a participant is responsible for every barrier they encounter.
- B. The reach is worth reporting. Two hundred distinct people attended this quarter. That is a real achievement, but the records do not tell us what happened to their employment afterward.
- C. Exactly. Our mission remains ambitious. The reporting becomes more credible when it states what we measured, what we seek to change, and which links still need to be tested.
- D. That is a theory of change. It makes the expected route understandable, but it does not prove that every link has occurred because people attended a session.

Review 1 / Meaning and context / continued

4. Rebuild the exchange from "Mission fit does not change the grant agreement". Amir: "I will tell them that the variation is being requested, not that the donor has approved it. We can also check other funding options." Leah: [missing response] Amir: "Once the decision arrives, I will update the activity plan and the reporting arrangements to match the approved position." Which response belongs in the gap?

- A.** That is the right status. Any alternative permitted expenditure needs its own review under the relevant source. We should not solve one restricted-funding problem by assuming another pot has no conditions.
- B.** Yes, a specific variation request. Include the amount, proposed work, timing, and the effect on the reading-program commitments, so the donor can assess the actual change rather than a vague idea.
- C.** Do not create a commitment from this proposed transfer while approval is pending. A deposit can still obligate resources. We should not promise the funds before the specified process is complete.
- D.** It is encouraging, but mission alignment and informal support do not change the award terms. We need to distinguish liking the proposal from authorizing this grant to pay for it.

[Answers and explanations, page 159](#)

A Read the situation

LESSON 03 / MONITORING, EVALUATION, AND LEARNING

Report a before-and-after result with the correct population, measurement limits, and a proportionate learning conclusion.

The scores improved, but the cause is not isolated

A budgeting-skills program enrolls 75 adults. Sixty complete both the initial and final version of the same 100-point knowledge test. Their mean score rises from 40 to 58, an 18-point increase. Fifteen enrollees lack a paired result. There is no comparison group, and practice effects, outside learning, and reasons for missing results have not been examined. Evaluation officer Priya and program manager Dan must report the improvement among paired completers without presenting it as a proven program effect, a result for all 75 enrollees, or evidence that household finances have improved.

People: Priya, Evaluation officer; Dan, Program manager.

Read the record

Choose one answer per question using the facts above.

1. Which group has the paired score result?

- A. All seventy-five enrollees
- B. Only fifteen people missing a test
- C. A separate comparison group
- D. Sixty people who completed both tests

2. What is the observed mean-score change?

- A. An increase of 58 points
- B. An 18-percentage-point employment gain
- C. No change
- D. An increase of 18 points, from 40 to 58

3. What is not established?

- A. A causal effect on household finances
- B. An increase in the paired group's mean test score
- C. Fifteen enrollees lacking paired results
- D. The absence of a comparison group

[Answers and explanations, page 129](#)

B Vocabulary in use

CORE TERMS

MEL

Monitoring, evaluation, and learning; connected functions for tracking and improving work.

strengthen the MEL approach

evaluation

Systematic assessment of an intervention and its results or value.

commission an evaluation

paired observation

Measurements from the same person or unit at two points.

analyze paired observations

posttest

A measurement taken after the relevant instruction or activity.

review posttest results

score point

One unit on a specified scoring scale.

report a score-point change

missing data

Information absent from the expected measurement record.

assess missing data

monitoring

Routine tracking of defined activities, conditions, or results.

conduct program monitoring

learning agenda

A set of priority questions guiding inquiry and adaptation.

define the learning agenda

pretest

A measurement taken before the relevant instruction or activity.

administer the pretest

mean score

The arithmetic average of scores in a defined group.

calculate the mean score

completer

A participant who finishes the defined measurement or program steps.

identify paired completers

attrition

Loss of participants or observations between stages.

examine attrition

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

MEL MEL

strengthen the MEL approach

Keep the meaning precise: Monitoring, evaluation, and learning; connected functions for tracking and improving work.

pretest PRETEST

administer the pretest

Keep the meaning precise: A measurement taken before the relevant instruction or activity.

B Precision and professional shorthand

EXTEND YOUR RANGE

comparison group

A group used to help assess what might occur without the same intervention.

define a comparison group

practice effect

Improvement from familiarity with a test rather than the intended learning alone.

examine practice effects

selection bias

Distortion caused by how people enter or remain in the analyzed group.

assess selection bias

contribution

A role an intervention plays in a result, without necessarily being the only influence.

examine the program's contribution

validity

How well a measure or inference supports its intended interpretation.

assess validity

behavioral outcome

A measured change in what people do, rather than only what they know.

measure behavioral outcomes

counterfactual

The unobserved or estimated result without the intervention.

assess the counterfactual

confounding factor

Another influence that complicates interpretation of a relationship.

investigate confounding factors

causal attribution

Assignment of an observed change to a specific cause.

support causal attribution

triangulation

Comparison of different sources or methods to examine a finding.

use triangulation

reliability

Consistency of measurement under relevant conditions.

check reliability

adaptive management

Adjusting program decisions in response to evidence and learning.

support adaptive management

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

attrition ATTRITION

examine attrition

Keep the meaning precise: Loss of participants or observations between stages.

selection bias SELECTION BIAS

assess selection bias

Keep the meaning precise: Distortion caused by how people enter or remain in the analyzed group.

Phrases that move the work forward

State the measured group

Sixty participants completed both tests.

Use the correct unit

The observed increase is eighteen score points.

Avoid broadening the population

We cannot apply the paired result to all seventy-five enrollees.

Keep alternatives open

Practice effects and outside learning have not been examined.

Keep the result visible

The observed improvement is still useful to report.

Ask about missingness

Why are the paired results missing for those fifteen people?

Use multiple sources carefully

We can compare test findings with other appropriate evidence.

Avoid a false choice

We do not have to choose between proven success and no value.

State the result

Their mean score increased from forty to fifty-eight.

Disclose the missing group

Fifteen enrollees lack a paired result.

Name the design limit

There was no comparison group.

Avoid causal overstatement

The change alone does not isolate the program's effect.

Separate knowledge from behavior

A test score does not establish better household financial behavior.

Check the measure

Does the test assess the skills the program intends to develop?

Plan the next inquiry

The learning agenda should address the key alternative explanations.

Close the finding

Report the change, analyzed group, missing data, and limits together.

Precision in real exchanges

Purpose: Disclose the missing group

Useful wording: Fifteen enrollees lack a paired result.

Purpose: Avoid broadening the population

Useful wording: We cannot apply the paired result to all seventy-five enrollees.

D Choose the response that fits

Choose one response for each situation. Preserve the facts, the decision boundary, and the purpose of the exchange.

1. Which finding is accurate?

- A.** All 75 participants improved their finances by 18%.
- B.** The program alone caused an 18-point gain.
- C.** The missing 15 participants had no learning.
- D.** The mean score among 60 paired completers rose from 40 to 58.

2. What proportion lacks a paired result?

- A.** 80% of enrollees
- B.** 25% of enrollees
- C.** 20% of enrollees
- D.** 15% of enrollees

3. A colleague needs the term for this meaning: A set of priority questions guiding inquiry and adaptation. Which term fits?

- A.** practice effect
- B.** score point
- C.** learning agenda
- D.** validity

D Choose the response that fits / continued

4. Rebuild the exchange from "The scores improved, but the cause is not isolated".

Dan: "The chart labels the change eighteen percent. Because the scale is out of a hundred, I can see how that happened, but I would rather name the actual units."

Priya: [missing response] Dan: "The missing fifteen are a fifth of enrollment. We need to know why their paired results are absent." Which response belongs in the gap?

- A. Use eighteen score points. That is the direct subtraction of forty from fifty-eight on this scale. If we add a relative percentage, it needs its own clear baseline and explanation.
- B. We can report the improvement while limiting causal attribution. A bounded observation is useful. It is not the same as proving that the program caused all of the gain.
- C. The absence of a comparison group is an important design limit. The before-and-after result alone does not show what would have happened over the same period without this program.
- D. Correct. It is a change in the mean score. It does not mean that each person gained exactly eighteen points or that the missing participants had the same result.

[Answers and explanations, page 129](#)

One useful distinction

The mean rose by 18 points on a 100-point test among the same 60 paired completers. That is not an employment percentage or a result for every enrollee. Missing paired results for 15 of 75 mean 20% lack that comparison.

E Conversation

The scores improved, but the cause is not isolated

The scores improved, but the cause is not isolated

Complete the numbered gaps. Use each bank entry once; some entries contain several words.

WORD AND PHRASE BANK

paired observations / comparison group / adaptive management / missing data /
mean score / learning agenda / behavioral outcome / practice effect / causal attribution /
score points

- 01 **Dan:** The score change looks encouraging. The draft says everyone's financial skills improved by eighteen points. Before I circulate it, which part of that sentence can the data support?
- 02 **Priya:** We need to define the ¹ _____ first. Sixty people completed both tests. Their average moved from forty to fifty-eight, but fifteen of the seventy-five enrollees do not have a paired result.
- 03 **Dan:** Then the eighteen-point improvement belongs to those sixty people as a group, not automatically to everyone who enrolled.
- 04 **Priya:** Correct. It is a change in the ² _____. It does not mean that each person gained exactly eighteen points or that the missing participants had the same result.
- 05 **Dan:** The chart labels the change eighteen percent. Because the scale is out of a hundred, I can see how that happened, but I would rather name the actual units.
- 06 **Priya:** Use eighteen ³ _____. That is the direct subtraction of forty from fifty-eight on this scale. If we add a relative percentage, it needs its own clear baseline and explanation.

E Conversation / continued

- 07 **Dan:** The missing fifteen are a fifth of enrollment. We need to know why their paired results are absent.
- 08 **Priya:** Yes, examine the ⁴ _____. We should not assume they learned nothing, or that they improved just as much. Their absence may affect how well the analyzed group represents the full intake.
- 09 **Dan:** We used the same questions before and after. Some of the gain could come from familiarity rather than the teaching alone.
- 10 **Priya:** A ⁵ _____ is one possibility to examine. Outside learning is another. We have not tested those explanations, so we should neither ignore them nor claim they account for the entire change.

Conversation continues on the next page.

The scores improved, but the cause is not isolated

CONVERSATION / CONTINUED

- 11 **Dan:** There was no other group taking the test without the program. Does that limit what we can say about the cause?
- 12 **Priya:** The absence of a ⁶ _____ is an important design limit. The before-and-after result alone does not show what would have happened over the same period without this program.
- 13 **Dan:** I want to avoid presenting the data as useless simply because the design cannot answer every question.
- 14 **Priya:** We can report the improvement while limiting ⁷ _____. A bounded observation is useful. It is not the same as proving that the program caused all of the gain.
- 15 **Dan:** And higher knowledge scores do not necessarily mean people changed how they manage household money.
- 16 **Priya:** Exactly. A ⁸ _____ needs its own measure. We have not demonstrated improved household finances, reduced debt, or sustained behavior from this test result.
- 17 **Dan:** We could examine missingness, review the test, and compare the findings with other appropriate evidence before redesigning the sessions.
- 18 **Priya:** That gives us a focused ⁹ _____. Keep the questions tied to decisions the team needs to make, and use an appropriate process for collecting any further participant information.
- 19 **Dan:** I will revise the report to say the mean rose from forty to fifty-eight among sixty paired completers, with the missing results and design limits alongside.
- 20 **Priya:** Good. That supports ¹⁰ _____. We can improve the program and its evaluation without turning an encouraging observation into a causal claim that the current design cannot support.

CHECK THE GAPS

1. paired observations / 2. mean score / 3. score points / 4. missing data / 5. practice effect / 6. comparison group / 7. causal attribution / 8. behavioral outcome / 9. learning agenda / 10. adaptive management

[Why these answers fit, page 130](#)

F Check accuracy and scope

The scores improved, but the cause is not isolated

Return to the case

A budgeting-skills program enrolls 75 adults. Sixty complete both the initial and final version of the same 100-point knowledge test. Their mean score rises from 40 to 58, an 18-point increase. Fifteen enrollees lack a paired result. There is no comparison group, and practice effects, outside learning, and reasons for missing results have not been examined. Evaluation officer Priya and program manager Dan must report the improvement among paired completers without presenting it as a proven program effect, a result for all 75 enrollees, or evidence that household finances have improved.

Choose one answer per question. Use the case facts and keep any uncertainty or limits intact.

1. How should practice effects be described?

- A. An impossible influence because the test is numerical
- B. Evidence that every score is false
- C. A possible influence that has not yet been examined
- D. A proven explanation for the entire gain

2. Which next conclusion is justified?

- A. Discard every result because the design has limits.
- B. Investigate missing results and alternative explanations while retaining the bounded finding.
- C. Claim improved household finances from the test alone.
- D. Assume a comparison group would definitely show no effect.

[Answers and explanations, page 132](#)

Listen for the distinction

Swap roles for turns 11-20 and retain both the observed improvement and its causal limits.

Learning can begin before causal proof

A useful result need not be dismissed because it does not establish causation. Describe the observed change precisely, disclose the missing information, and identify what the team can learn next. Avoid treating methodological limits as either proof of failure or permission to exaggerate success.

F Say it / transfer to a new case

Report another paired-score result

A program enrolls 50 people. Forty complete both tests, with a mean rising from 55 to 67 on a 100-point scale. Ten lack paired data. No comparison group is available.

Complete the four gaps. With a partner, read alternate roles, then switch. Studying alone, read both roles and pause before each response.

WORD AND PHRASE BANK

20% / 10 people / 40 people / 12 points

- 01 **Manager:** The paired-completer group contains ¹ _____.
- 02 **Analyst:** The observed mean-score gain is ² _____.
- 03 **Manager:** The number lacking paired data is ³ _____.
- 04 **Analyst:** The proportion lacking paired data is ⁴ _____.

CHECK THE GAPS

1. 40 people / 2. 12 points / 3. 10 people / 4. 20%

[Why these answers fit, page 132](#)

Rebuild the exchange

Choose the missing response. Read the completed three-turn exchange aloud, changing roles on the second reading.

1. Rebuild the exchange from "The scores improved, but the cause is not isolated". Dan: "I want to avoid presenting the data as useless simply because the design cannot answer every question." Priya: [missing response] Dan: "And higher knowledge scores do not necessarily mean people changed how they manage household money." Which response belongs in the gap?

- A.** We can report the improvement while limiting causal attribution. A bounded observation is useful. It is not the same as proving that the program caused all of the gain.
- B.** Correct. It is a change in the mean score. It does not mean that each person gained exactly eighteen points or that the missing participants had the same result.
- C.** That gives us a focused learning agenda. Keep the questions tied to decisions the team needs to make, and use an appropriate process for collecting any further participant information.
- D.** The absence of a comparison group is an important design limit. The before-and-after result alone does not show what would have happened over the same period without this program.

[Answers and explanations, page 133](#)

A Read the situation

LESSON 04 / FIELD OPERATIONS AND PARTNER COORDINATION

Coordinate a date change by separating partner availability, community confirmation, transport arrangements, and the final go-ahead.

A partner changes the visit, but the community has not agreed

The RiverLink field visit was arranged for 10 October. A partner now requests 12 October and confirms that its own team can attend then. The community contact has not been consulted about the change, and transport remains booked for 10 October. Community liaison Nadia and logistics officer Ben must establish whether the new date works before treating it as agreed. Ben will check transport availability and any change cost by 15:00 local time. Nadia will consult the community contact and update the coordinator by 16:00. Neither has authority to approve additional spending independently.

People: Nadia, Community liaison; Ben, Logistics officer.

Read the record

Choose one answer per question using the facts above.

1. Who has confirmed availability on 12 October?

- A. The spending approver
- B. The partner's team only
- C. The community contact and every participant
- D. The transport provider

2. What remains booked for 10 October?

- A. A new accommodation package
- B. Transport
- C. The revised community meeting
- D. A confirmed visit on 12 October

3. What may Ben and Nadia approve independently?

- A. Any change cost under the original booking
- B. The community's agreement
- C. Every partner's final attendance
- D. Neither may approve additional spending.

[Answers and explanations, page 134](#)

B Vocabulary in use

CORE TERMS

field visit

An organized visit to a program location.

coordinate a field visit

implementing partner

An organization carrying out agreed program work.

coordinate with the implementing partner

proposed date

A date suggested but not necessarily agreed.

circulate the proposed date

itinerary

The planned sequence of places, times, and activities for a visit.

update the itinerary

rescheduling

Moving an activity to another time or date.

coordinate rescheduling

cancellation term

A condition governing cancellation and its consequences.

check cancellation terms

community liaison

Communication and relationship work with an affected community.

maintain community liaison

availability

Whether a person or resource can be used at a specified time.

confirm availability

confirmed date

A date accepted through the required coordination process.

communicate the confirmed date

transport booking

An arrangement reserving transport for stated requirements.

amend the transport booking

change fee

A charge associated with altering an arrangement.

verify the change fee

lead time

The time needed between a request and its delivery.

allow sufficient lead time

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

field visit **FIELD VISIT**

coordinate a field visit

Keep the meaning precise: An organized visit to a program location.

confirmed date **CONFIRMED DATE**

communicate the confirmed date

Keep the meaning precise: A date accepted through the required coordination process.

B Precision and professional shorthand

EXTEND YOUR RANGE

dependency

A condition another activity relies on.

identify a scheduling dependency

notification

A message informing someone of an event or change.

send a notification

confirmation

An explicit statement that an arrangement or fact is agreed or established.

obtain confirmation

action owner

The person responsible for a specified next step.

name the action owner

contingency

An alternative arrangement for a possible difficulty.

agree a contingency

coordination log

A record of arrangements, owners, and current status.

update the coordination log

focal point

The designated contact for a particular function or relationship.

contact the focal point

acknowledgment

Confirmation that a message has been received.

request acknowledgment

handover

Transfer of responsibility and relevant information.

complete the handover

decision deadline

The time by which an identified decision is needed.

set a decision deadline

access requirement

A condition needed for someone to participate or reach a location.

check access requirements

go-ahead

Authorization to proceed with an agreed action.

obtain the go-ahead

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

lead time LEAD TIME

allow sufficient lead time

Keep the meaning precise: The time needed between a request and its delivery.

confirmation CONFIRMATION

obtain confirmation

Keep the meaning precise: An explicit statement that an arrangement or fact is agreed or established.

C Phrases that move the work forward

Name the original arrangement

The visit and transport were arranged for the tenth.

Limit the confirmation

Only the partner's team has confirmed that date.

Distinguish receipt from agreement

An acknowledgment tells us the message arrived, not that the date is accepted.

Check feasibility

Can the provider accommodate the proposed change?

Respect authority

We cannot approve additional spending ourselves.

Set the update time

I will report the transport position by fifteen hundred local time.

Avoid an early cancellation

Do not cancel the original arrangement before the coordinated decision.

Report an unresolved item

Community availability is still pending at this update.

Identify the proposed change

The partner is asking to move the visit to the twelfth.

Include the community

We still need to ask whether the revised date works for the community.

Check the booking

Transport is still booked for the original date.

Check cost

Please identify any change fee before we request approval.

Assign the action

I will check transport availability and terms.

Keep the status provisional

Please label the twelfth as proposed, not confirmed.

Name a dependency

The revised itinerary depends on community confirmation and transport.

Close the loop

Once the go-ahead is recorded, send the same confirmed details to everyone.

Precision in real exchanges

Purpose: Include the community

Useful wording: We still need to ask whether the revised date works for the community.

Purpose: Distinguish receipt from agreement

Useful wording: An acknowledgment tells us the message arrived, not that the date is accepted.

D Choose the response that fits

Choose one response for each situation. Preserve the facts, the decision boundary, and the purpose of the exchange.

1. Which status message is accurate?

- A.** The entire visit is confirmed for 12 October.
- B.** The community agreed because an email was sent.
- C.** Transport has moved automatically with the partner's calendar.
- D.** The partner is available on 12 October; community confirmation and transport checks are pending.

2. Which question should Nadia ask?

- A.** Does 12 October work for the community, including relevant access arrangements?
- B.** Why did you reject a date you have not received?
- C.** Can we treat silence as agreement?
- D.** Will you pay an unapproved transport charge?

3. A colleague needs the term for this meaning: Whether a person or resource can be used at a specified time. Which term fits?

- A.** rescheduling
- B.** availability
- C.** notification
- D.** contingency

D Choose the response that fits / continued

4. Rebuild the exchange from "A partner changes the visit, but the community has not agreed". Nadia: "I will contact the community focal point now. I do not want an email delivery receipt to become our evidence that everyone agreed." Ben: [missing response] Nadia: "Has anyone actually changed the transport booking? I can see the new calendar invitation, but that does not tell me what the provider has reserved." Which response belongs in the gap?

- A.** Please include any relevant access requirements in that conversation. A different date could alter who can take part, even if the meeting place remains the same.
- B.** Not before the coordinated go-ahead. First establish the consequences and the decision route. Otherwise we could lose the original arrangement without having a workable replacement.
- C.** An acknowledgment is useful, but it is not the same as acceptance. Record the actual response and any conditions rather than simply marking the communication complete.
- D.** No, the transport booking is still for the tenth. I will ask the provider about availability on the twelfth and the terms for changing the reservation.

[Answers and explanations, page 134](#)

One useful distinction

The partner is available on 12 October, but the visit is not yet confirmed for that date. Keep availability, community agreement, transport feasibility, and spending authority separate. A message sent or acknowledged does not establish all four.

E Conversation

A partner changes the visit, but the community has not agreed

A partner changes the visit, but the community has not agreed

Complete the numbered gaps. Use each bank entry once; some entries contain several words.

WORD AND PHRASE BANK

transport booking / go-ahead / coordination log / acknowledgment / dependency /
action owner / access requirements / itinerary / change fee / proposed date

- 01 **Nadia:** RiverLink's partner can move from the tenth to the twelfth. They have sent a revised calendar invite, but I have not checked that date with the community yet.
- 02 **Ben:** Then the twelfth is still the ¹ _____. The partner's availability does not tell us whether the community can attend or whether the practical arrangements can move with them.
- 03 **Nadia:** Exactly. Some people may have already rearranged their work for the original visit. I need to ask whether the change is workable.
- 04 **Ben:** Please include any relevant ² _____ in that conversation. A different date could alter who can take part, even if the meeting place remains the same.
- 05 **Nadia:** I will contact the community focal point now. I do not want an email delivery receipt to become our evidence that everyone agreed.
- 06 **Ben:** An ³ _____ is useful, but it is not the same as acceptance. Record the actual response and any conditions rather than simply marking the communication complete.
- 07 **Nadia:** Has anyone actually changed the transport booking? I can see the new calendar invitation, but that does not tell me what the provider has reserved.
- 08 **Ben:** No, the ⁴ _____ is still for the tenth. I will ask the provider about availability on the twelfth and the terms for changing the reservation.
- 09 **Nadia:** There could be an extra charge. We should know that before telling the partner that the revised arrangements are settled.
- 10 **Ben:** I will check the ⁵ _____ and any other relevant terms. Neither of us can approve additional spending, so I will identify what needs to go to the authorized approver.

Conversation continues on the next page.

A partner changes the visit, but the community has not agreed

CONVERSATION / CONTINUED

- 11 **Nadia:** When can you give the coordinator that information? The partner is waiting for a response, and we need a realistic next update.
- 12 **Ben:** I am the ⁶ _____ for transport. I will report availability and terms by fifteen hundred local time, even if the provider has not yet confirmed every detail.
- 13 **Nadia:** I will update the coordinator by sixteen hundred local time after contacting the community. If I have not received a response, I will say that clearly.
- 14 **Ben:** Good. Put those updates in the ⁷ _____. The deadline is for an accurate status report, not a promise that the revised visit will definitely be approved by then.
- 15 **Nadia:** Should we cancel the original transport now so that we do not forget it later?
- 16 **Ben:** Not before the coordinated ⁸ _____. First establish the consequences and the decision route. Otherwise we could lose the original arrangement without having a workable replacement.
- 17 **Nadia:** Once the community responds and you have the transport position, the coordinator can assess the complete picture rather than two separate assumptions.
- 18 **Ben:** Then we can update the ⁹ _____ from the recorded decision. Everyone should receive the same date, meeting details, and responsibilities, including any remaining conditions that affect the visit.
- 19 **Nadia:** I will tell the partner that their availability is noted, but community confirmation and transport checks are still pending.
- 20 **Ben:** That keeps each ¹⁰ _____ visible. We can move quickly without describing a one-party preference as a fully agreed field visit.

CHECK THE GAPS

1. proposed date / 2. access requirements / 3. acknowledgment / 4. transport booking / 5. change fee / 6. action owner / 7. coordination log / 8. go-ahead / 9. itinerary / 10. dependency

[Why these answers fit, page 135](#)

F Check accuracy and scope

A partner changes the visit, but the community has not agreed

Return to the case

The RiverLink field visit was arranged for 10 October. A partner now requests 12 October and confirms that its own team can attend then. The community contact has not been consulted about the change, and transport remains booked for 10 October. Community liaison Nadia and logistics officer Ben must establish whether the new date works before treating it as agreed. Ben will check transport availability and any change cost by 15:00 local time. Nadia will consult the community contact and update the coordinator by 16:00. Neither has authority to approve additional spending independently.

Choose one answer per question. Use the case facts and keep any uncertainty or limits intact.

1. What should Ben report by 15:00?

- A. A guaranteed visit regardless of other confirmations
- B. The community's decision on Nadia's behalf
- C. A payment authorization he does not hold
- D. Transport availability, change terms, and any cost requiring approval

2. Which action closes coordination properly?

- A. Record the go-ahead and circulate consistent confirmed details to all relevant contacts.
- B. Send different dates to different parties.
- C. Leave the original booking unchanged without telling anyone.
- D. Cancel first and ask about community availability afterward.

[Answers and explanations, page 137](#)

Listen for the distinction

Swap roles for turns 11-20; give each owner and update deadline clearly.

Coordination includes the people receiving the visit

A change agreed between organizations may still inconvenience the community or exclude people who arranged their time around the original visit. Ask whether the revised date works and explain what is pending. Silence or receipt of a message is not automatically agreement.

F Say it / transfer to a new case

Coordinate another proposed visit change

A partner proposes moving a visit from 18 to 20 November. Transport remains booked for the eighteenth. Liaison Omar will seek community confirmation; logistics officer Mei will check transport by 14:00 local time.

Complete the four gaps. With a partner, read alternate roles, then switch. Studying alone, read both roles and pause before each response.

WORD AND PHRASE BANK

community confirmation / 18 November / 14:00 local time / 20 November

- 01 **Coordinator:** The proposed new date is ¹ _____.
- 02 **Mei:** The existing transport date is ² _____.
- 03 **Omar:** My outstanding task is ³ _____.
- 04 **Mei:** My transport update is due at ⁴ _____.

CHECK THE GAPS

1. 20 November / 2. 18 November / 3. community confirmation / 4. 14:00 local time

[Why these answers fit, page 137](#)

Rebuild the exchange

Choose the missing response. Read the completed three-turn exchange aloud, changing roles on the second reading.

1. Rebuild the exchange from "A partner changes the visit, but the community has not agreed". Nadia: "I will update the coordinator by sixteen hundred local time after contacting the community. If I have not received a response, I will say that clearly." Ben: [missing response] Nadia: "Should we cancel the original transport now so that we do not forget it later?" Which response belongs in the gap?

- A.** I will check the change fee and any other relevant terms. Neither of us can approve additional spending, so I will identify what needs to go to the authorized approver.
- B.** I am the action owner for transport. I will report availability and terms by fifteen hundred local time, even if the provider has not yet confirmed every detail.
- C.** Then the twelfth is still the proposed date. The partner's availability does not tell us whether the community can attend or whether the practical arrangements can move with them.
- D.** Good. Put those updates in the coordination log. The deadline is for an accurate status report, not a promise that the revised visit will definitely be approved by then.

[Answers and explanations, page 138](#)

Review 2 / Meaning and context

Use language from the lessons you have completed. Choose one answer per question.

Case file

Revisit "Monitoring, Evaluation, and Learning" and "Field Operations and Partner Coordination". Choose precise terminology, then reconstruct the missing responses using both neighboring turns. The final two questions also revisit earlier conversations.

1. A colleague needs the term for this meaning: Systematic assessment of an intervention and its results or value. Which term fits?

- A. counterfactual
- B. triangulation
- C. mean score
- D. evaluation

2. A colleague needs the term for this meaning: An arrangement reserving transport for stated requirements. Which term fits?

- A. action owner
- B. field visit
- C. transport booking
- D. dependency

3. Rebuild the exchange from "Mission fit does not change the grant agreement". Amir: "Then I should prepare a request for three thousand and explain why we want to change the activity." Leah: [missing response] Amir: "We would need to explain whether fewer reading sessions or fewer materials would result. I should not leave the original promise untouched on paper." Which response belongs in the gap?

- A. Do not create a commitment from this proposed transfer while approval is pending. A deposit can still obligate resources. We should not promise the funds before the specified process is complete.
- B. That is the right status. Any alternative permitted expenditure needs its own review under the relevant source. We should not solve one restricted-funding problem by assuming another pot has no conditions.
- C. Yes, a specific variation request. Include the amount, proposed work, timing, and the effect on the reading-program commitments, so the donor can assess the actual change rather than a vague idea.
- D. It is encouraging, but mission alignment and informal support do not change the award terms. We need to distinguish liking the proposal from authorizing this grant to pay for it.

Review 2 / Meaning and context / continued

4. Rebuild the exchange from "A partner changes the visit, but the community has not agreed". Nadia: "Once the community responds and you have the transport position, the coordinator can assess the complete picture rather than two separate assumptions." Ben: [missing response] Nadia: "I will tell the partner that their availability is noted, but community confirmation and transport checks are still pending." Which response belongs in the gap?

- A.** Then we can update the itinerary from the recorded decision. Everyone should receive the same date, meeting details, and responsibilities, including any remaining conditions that affect the visit.
- B.** Good. Put those updates in the coordination log. The deadline is for an accurate status report, not a promise that the revised visit will definitely be approved by then.
- C.** I am the action owner for transport. I will report availability and terms by fifteen hundred local time, even if the provider has not yet confirmed every detail.
- D.** Then the twelfth is still the proposed date. The partner's availability does not tell us whether the community can attend or whether the practical arrangements can move with them.

[Answers and explanations, page 162](#)

A Read the situation

LESSON 05 / SAFEGUARDING AND INCIDENT REPORTING

Respond calmly to a concern, distinguish reported information from direct observation, and explain the designated reporting route without promising secrecy.

Receive the concern without conducting your own investigation

Volunteer Elena tells manager Sam that a participant reported a worker threatening to withdraw support unless the participant did a private favor. Elena did not witness the interaction and does not know whether there is an immediate danger. The fictional organization requires concerns to be passed promptly through its secure safeguarding route, without waiting for proof. Its policy provides an independent alternate contact if the usual lead is implicated or unavailable. Immediate danger requires the relevant emergency route without delay. Sam must listen, clarify immediate safety needs, record the account accurately, and avoid investigating or confronting the worker.

People: Elena, Volunteer reporting a concern; Sam, Receiving manager.

Read the record

Choose one answer per question using the facts above.

1. What did Elena directly witness?

- A. The worker making the alleged threat
- B. A completed investigation
- C. An emergency response
- D. She did not witness the reported interaction.

2. Must Sam wait for proof before reporting?

- A. Yes; the worker must first admit the allegation.
- B. No; the stated policy requires prompt reporting of concerns.
- C. Yes; a concern needs a completed investigation first.
- D. Yes; only a witness can report.

3. What should Sam establish promptly?

- A. How to guarantee complete secrecy
- B. Whether there is an immediate safety need requiring the emergency route
- C. Whether the allegation can be publicly announced
- D. How to confront the worker alone

[Answers and explanations, page 139](#)

B Vocabulary in use

CORE TERMS

safeguarding

Organizational work to prevent and respond to harm, abuse, and exploitation.

raise a safeguarding concern

disclosure

A person's communication of information about an experience or event.

receive a disclosure

direct observation

Something a person personally saw or heard.

distinguish direct observation

immediate danger

A present threat requiring urgent action through the appropriate route.

assess immediate danger

alternate contact

A specified substitute reporting contact under the policy.

use the alternate contact

confidentiality

Limits on access to information under the applicable arrangements.

explain confidentiality

concern

Information suggesting a possible problem that needs appropriate attention.

report a concern

allegation

A reported claim not yet established through the relevant process.

record an allegation

reported account

Information communicated by another person.

attribute the reported account

designated lead

The person assigned responsibility for a defined safeguarding function.

contact the designated lead

reporting route

The approved channel through which a concern is passed.

follow the reporting route

need-to-know basis

Sharing information only with those requiring it for the relevant task.

share on a need-to-know basis

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

safeguarding SAFEGUARDING

raise a safeguarding concern

Keep the meaning precise: Organizational work to prevent and respond to harm, abuse, and exploitation.

reported account REPORTED ACCOUNT

attribute the reported account

Keep the meaning precise: Information communicated by another person.

B Precision and professional shorthand

EXTEND YOUR RANGE

secure channel

An approved communication method protecting sensitive information appropriately.

use a secure channel

verbatim wording

The exact words used by a speaker.

preserve verbatim wording

retaliation

Harmful treatment in response to a report or other protected action.

report retaliation concerns

coercion

Pressure or threats used to influence someone's actions.

report possible coercion

support referral

Connection to an appropriate source of assistance.

arrange a support referral

information minimization

Limiting information to what is necessary for the stated purpose.

apply information minimization

factual record

An account separating known facts, sources, and uncertainties.

create a factual record

inference

A conclusion drawn beyond what was directly stated or observed.

label an inference

power imbalance

Unequal influence or control between people or groups.

recognize a power imbalance

professional boundary

A limit defining appropriate conduct in a work relationship.

maintain professional boundaries

investigation

An authorized process to establish relevant facts.

preserve the investigation process

acknowledged receipt

Confirmation that the designated recipient received the concern.

obtain acknowledged receipt

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

need-to-know basis NEED-TO-KNOW BASIS

share on a need-to-know basis

Keep the meaning precise: Sharing information only with those requiring it for the relevant task.

retaliation RETALIATION

report retaliation concerns

Keep the meaning precise: Harmful treatment in response to a report or other protected action.

Phrases that move the work forward

Welcome the report

Thank you for bringing this concern to me.

Clarify the source

Did you witness the interaction, or are you describing what you were told?

Distinguish uncertainty

We do not yet know whether the reported event occurred as described.

Explain sharing

I cannot promise secrecy; I need to use the designated reporting route.

Use the secure route

I will pass this through the approved secure channel promptly.

Avoid confrontation

Do not approach the worker to test the account yourself.

Record without embellishment

I will separate what you observed from what the participant reported.

Avoid a promised outcome

I cannot predict the outcome, but I can explain the next reporting step.

Check immediate safety

Is anyone in immediate danger or in need of urgent assistance?

Preserve the account

Please use the words you remember, without filling in missing details.

Avoid a proof threshold

You do not need to investigate before raising the concern.

Limit circulation

I will share the necessary information with the people who need to act.

Check the alternate

If the usual lead is implicated or unavailable, I will use the policy's alternate contact.

Keep roles clear

The authorized process will determine the next fact-finding steps.

Preserve urgent action

Immediate danger requires the relevant emergency route without delay.

Close responsibly

I will confirm that the designated recipient has received the concern.

Precision in real exchanges

Purpose: Preserve the account

Useful wording: Please use the words you remember, without filling in missing details.

Purpose: Distinguish uncertainty

Useful wording: We do not yet know whether the reported event occurred as described.

D Choose the response that fits

Choose one response for each situation. Preserve the facts, the decision boundary, and the purpose of the exchange.

1. Which response is appropriate?

- A.** I promise nobody else will ever hear this.
- B.** We should confront the worker immediately ourselves.
- C.** Thank you; let us check immediate safety and use the designated route.
- D.** Bring proof before anyone will listen.

2. Which record preserves the source?

- A.** No concern exists because Elena was not present.
- B.** Elena reports that the participant described a threat; Elena did not witness it.
- C.** Sam witnessed the worker making a proven threat.
- D.** Every detail has already been independently verified.

3. A colleague needs the term for this meaning: A reported claim not yet established through the relevant process. Which term fits?

- A.** support referral
- B.** alternate contact
- C.** allegation
- D.** verbatim wording

D Choose the response that fits / continued

4. Rebuild the exchange from "Receive the concern without conducting your own investigation". Elena: "I was unsure whether I could report it because I only heard what the participant said. I cannot confirm what actually happened." Sam: [missing response] Elena: "I remember the phrase about losing support, but not the whole conversation word for word. Should I fill the gaps from what I think they meant?" Which response belongs in the gap?

- A.** Our policy specifies an independent alternate contact for those situations. We should use that route rather than abandon the report or send it only to someone whose involvement creates a conflict.
- B.** We need to clarify immediate safety through the appropriate process. Any immediate danger requires the relevant emergency route without delay, rather than waiting for our usual contact or an ordinary written report.
- C.** Please do not conduct an investigation yourself or confront the worker. Our policy does not require you to establish proof before reporting. The authorized people will decide the appropriate fact-finding steps.
- D.** Your reported account can still be passed on. State who told you what and make clear that you did not witness the interaction. Do not add certainty that you do not have.

[Answers and explanations, page 139](#)

One useful distinction

Elena can report exactly what the participant told her while stating that she did not witness the interaction. That distinction does not make the concern unimportant. It preserves the source of the information without declaring the allegation proved or disproved.

E Conversation

Receive the concern without conducting your own investigation

Receive the concern without conducting your own investigation

Complete the numbered gaps. Use each bank entry once; some entries contain several words.

WORD AND PHRASE BANK

concern / confidentiality / reporting route / reported account / verbatim wording /
immediate danger / investigation / secure channel / acknowledged receipt /
alternate contact

- 01 **Elena:** I need to pass on something a participant told me. They said a worker threatened to withdraw support unless they did a private favor. I did not witness it myself.
- 02 **Sam:** Thank you for raising this ¹ _____. Before we discuss the account, do you know whether anyone is in immediate danger or needs urgent assistance now?
- 03 **Elena:** I do not know. The participant did not explain whether the worker is with them now, and I do not want to guess.
- 04 **Sam:** We need to clarify immediate safety through the appropriate process. Any ² _____ requires the relevant emergency route without delay, rather than waiting for our usual contact or an ordinary written report.
- 05 **Elena:** I was unsure whether I could report it because I only heard what the participant said. I cannot confirm what actually happened.
- 06 **Sam:** Your ³ _____ can still be passed on. State who told you what and make clear that you did not witness the interaction. Do not add certainty that you do not have.

E Conversation / continued

- 07 **Elena:** I remember the phrase about losing support, but not the whole conversation word for word. Should I fill the gaps from what I think they meant?
- 08 **Sam:** No. Preserve any ⁴ _____ you remember and identify the parts you are paraphrasing or unsure about. A polished reconstruction could accidentally change the meaning of the original account.
- 09 **Elena:** The participant seemed afraid of the worker finding out. Can I tell them that this will remain entirely between us?
- 10 **Sam:** Do not promise secrecy. Explain ⁵ _____ honestly: the necessary information must go through the designated process, with appropriate limits on who receives it and for what purpose.

Conversation continues on the next page.

Receive the concern without conducting your own investigation

CONVERSATION / CONTINUED

- 11 **Elena:** I was going to ask the worker what happened so that I could give you both sides before making a report.
- 12 **Sam:** Please do not conduct an ⁶ _____ yourself or confront the worker. Our policy does not require you to establish proof before reporting. The authorized people will decide the appropriate fact-finding steps.
- 13 **Elena:** I can provide the information I have through the designated channel. I should not put the participant's account into the general volunteer chat.
- 14 **Sam:** Correct. I will use the approved ⁷ _____ promptly. The record will separate the participant's reported words, your own observations, and anything that remains unknown.
- 15 **Elena:** What happens if the usual safeguarding lead is unavailable, or if a concern involves that person?
- 16 **Sam:** Our policy specifies an independent ⁸ _____ for those situations. We should use that route rather than abandon the report or send it only to someone whose involvement creates a conflict.
- 17 **Elena:** I also want to know what I can say if the participant asks what will happen to the worker.
- 18 **Sam:** Do not predict the outcome. Explain the next ⁹ _____ and appropriate support arrangements. We can be clear about the process without promising a finding, a sanction, or information we may not be able to share.

Receive the concern without conducting your own investigation / continued

- 19 **Elena:** I will keep the account accurate and avoid discussing it with other volunteers. Please let me know that the concern reaches the right recipient.
- 20 **Sam:** I will obtain ¹⁰ _____. That confirms the handover, not the outcome. If new immediate safety information emerges, use the appropriate urgent route rather than waiting for a routine update.

CHECK THE GAPS

1. concern / **2.** immediate danger / **3.** reported account / **4.** verbatim wording / **5.** confidentiality / **6.** investigation / **7.** secure channel / **8.** alternate contact / **9.** reporting route / **10.** acknowledged receipt

[Why these answers fit, page 140](#)

F Check accuracy and scope

Receive the concern without conducting your own investigation

Return to the case

Volunteer Elena tells manager Sam that a participant reported a worker threatening to withdraw support unless the participant did a private favor. Elena did not witness the interaction and does not know whether there is an immediate danger. The fictional organization requires concerns to be passed promptly through its secure safeguarding route, without waiting for proof. Its policy provides an independent alternate contact if the usual lead is implicated or unavailable. Immediate danger requires the relevant emergency route without delay. Sam must listen, clarify immediate safety needs, record the account accurately, and avoid investigating or confronting the worker.

Choose one answer per question. Use the case facts and keep any uncertainty or limits intact.

1. What if the usual lead is implicated?

- A. Hold the report until the next routine supervision session.
- B. Ask volunteers to corroborate it before choosing a recipient.
- C. Use the independent alternate contact specified in the policy.
- D. Ask that lead to select who receives the report.

2. Which promise should Sam avoid?

- A. Necessary information sharing through the designated route
- B. Prompt reporting under the stated policy
- C. An explanation of the next reporting step
- D. Complete secrecy and a guaranteed investigation outcome

[Answers and explanations, page 142](#)

Listen for the distinction

Swap roles for turns 11-20, stressing the secure route and independent alternate contact.

Calm does not mean dismissive

A measured response can help someone continue reporting without feeling interrogated. Thank them, explain what will happen next, and be honest about information-sharing limits. Do not require certainty, promise a particular outcome, or turn the receiving conversation into a credibility test.

F Say it / transfer to a new case

Identify the appropriate reporting steps

Volunteer Hana reports what a participant told her; she did not witness the event. The usual lead is implicated. The fictional policy provides an independent alternate contact and a secure reporting channel. Immediate danger requires the relevant emergency route.

Complete the four gaps. With a partner, read alternate roles, then switch. Studying alone, read both roles and pause before each response.

WORD AND PHRASE BANK

reported account / secure reporting channel / independent alternate contact / emergency route

- 01 **Manager:** Your information is a ¹ _____, not a direct observation.
- 02 **Hana:** Because the usual lead is implicated, we use the ² _____.
- 03 **Manager:** We send necessary details through the ³ _____.
- 04 **Hana:** Immediate danger requires the relevant ⁴ _____.

CHECK THE GAPS

1. reported account / 2. independent alternate contact / 3. secure reporting channel / 4. emergency route

[Why these answers fit, page 142](#)

F Say it / transfer to a new case / continued

Rebuild the exchange

Choose the missing response. Read the completed three-turn exchange aloud, changing roles on the second reading.

1. Rebuild the exchange from "Receive the concern without conducting your own investigation". Elena: "I can provide the information I have through the designated channel. I should not put the participant's account into the general volunteer chat." Sam: [missing response] Elena: "What happens if the usual safeguarding lead is unavailable, or if a concern involves that person?" Which response belongs in the gap?

- A.** Thank you for raising this concern. Before we discuss the account, do you know whether anyone is in immediate danger or needs urgent assistance now?
- B.** No. Preserve any verbatim wording you remember and identify the parts you are paraphrasing or unsure about. A polished reconstruction could accidentally change the meaning of the original account.
- C.** Correct. I will use the approved secure channel promptly. The record will separate the participant's reported words, your own observations, and anything that remains unknown.
- D.** Do not promise secrecy. Explain confidentiality honestly: the necessary information must go through the designated process, with appropriate limits on who receives it and for what purpose.

[Answers and explanations, page 143](#)

A Read the situation

LESSON 06 / VOLUNTEER MANAGEMENT AND TRAINING

Acknowledge a volunteer contribution while maintaining role boundaries, explaining the approval process, and arranging authorized cover.

An enthusiastic offer is not a driving authorization

Food-support volunteer Luis is approved for packing and stock counting. A driver becomes unavailable before a delivery, and Luis offers to drive the organization van. Coordinator Grace has no record that Luis has completed the organization-specific driving checks, assessment, or authorization. His ordinary driving experience does not replace those requirements. The fictional policy allows only currently authorized drivers to use the van. Grace must keep Luis within his approved role, contact the transport lead for authorized cover, and explain how he can request assessment for a future driving role without promising approval.

People: Luis, Packing volunteer; Grace, Volunteer coordinator.

Read the record

Choose one answer per question using the facts above.

1. Which duties are currently approved for Luis?

- A.** Driving the organization van
- B.** Assessing other drivers
- C.** Authorizing transport cover
- D.** Packing and stock counting

2. What does the fictional policy require for van use?

- A.** A busy delivery schedule
- B.** Current driver authorization
- C.** General confidence alone
- D.** Willingness to help

3. What can Grace offer Luis now?

- A.** Continue approved duties and request assessment for a future driving role.
- B.** Immediate authorization without checks
- C.** A guaranteed assessment result
- D.** Permission to substitute his personal experience for the process

[Answers and explanations, page 144](#)

B Vocabulary in use

CORE TERMS

role description

A statement of duties, responsibilities, and limits.

review the role description

induction

Initial orientation to the organization and relevant work.

complete volunteer induction

scope of role

The activities and responsibilities a role includes.

stay within the scope of role

screening

Relevant checks used to assess suitability under the applicable process.

complete role-specific screening

training completion

Finishing a specified training activity.

record training completion

authorization

Permission from the relevant authority to perform a task.

verify current authorization

volunteer agreement

A document setting out the organization's and volunteer's arrangements.

clarify the volunteer agreement

onboarding

The process of preparing someone to join an organization or role.

improve volunteer onboarding

role boundary

A limit separating authorized duties from other work.

maintain a role boundary

competence

Demonstrated ability to perform a task appropriately.

assess competence

competency assessment

Evaluation of whether someone can perform specified tasks appropriately.

arrange a competency assessment

supervision

Oversight and support for someone's work.

provide appropriate supervision

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

role description ROLE DESCRIPTION

review the role description

Keep the meaning precise: A statement of duties, responsibilities, and limits.

role boundary ROLE BOUNDARY

maintain a role boundary

Keep the meaning precise: A limit separating authorized duties from other work.

B Precision and professional shorthand

EXTEND YOUR RANGE

refresher training

Further training to maintain or update relevant knowledge and skills.

schedule refresher training

roster

A schedule assigning people to duties or shifts.

update the volunteer roster

transport lead

The person responsible for coordinating the relevant transport function.

notify the transport lead

escalation route

The designated path for an issue needing another level of responsibility.

use the escalation route

reasonable adjustment

An appropriate change considered under applicable needs, duties, and policy.

discuss reasonable adjustments

role expansion

A proposed increase in someone's authorized responsibilities.

request a role expansion

cover

A replacement arrangement when the usual person is unavailable.

arrange authorized cover

shift coordinator

The person organizing duties during a particular work period.

contact the shift coordinator

task allocation

Assignment of work to people within relevant limits.

confirm task allocation

availability notice

Information about when someone can or cannot work.

send an availability notice

feedback conversation

A discussion about performance, experience, or improvement.

arrange a feedback conversation

authorization register

A record showing who holds the relevant permission and its status.

check the authorization register

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

supervision SUPERVISION

provide appropriate supervision

Keep the meaning precise: Oversight and support for someone's work.

transport lead TRANSPORT LEAD

notify the transport lead

Keep the meaning precise: The person responsible for coordinating the relevant transport function.

Phrases that move the work forward

Recognize the offer

Thank you for offering to cover the delivery.

Separate experience from permission

Your driving experience does not establish authorization for this van.

Avoid a personal judgment

This is a role requirement, not a judgment about your intentions.

Keep the task bounded

Please continue with the approved packing work.

Avoid a shortcut

We cannot skip the required checks because the delivery is urgent.

Distinguish training and approval

Completing training is not automatically the final authorization.

Check support needs

We can discuss the arrangements needed for the assessment process.

Keep the roster accurate

Update the roster only after the authorized arrangement is confirmed.

State the current role

Your approved duties are packing and stock counting.

Name the policy limit

Only currently authorized drivers may use the organization vehicle.

Check the record

I need to verify the current authorization register.

Assign the escalation

I will contact the transport lead for authorized cover.

Explain the development route

You can request assessment for a future driving role.

Avoid a guarantee

I cannot promise the assessment result or approval date.

Clarify supervision

Who will provide the required oversight for the approved task?

Close respectfully

Your help is valuable, and we need to use it within the agreed role.

Precision in real exchanges

Purpose: Name the policy limit

Useful wording: Only currently authorized drivers may use the organization vehicle.

Purpose: Avoid a personal judgment

Useful wording: This is a role requirement, not a judgment about your intentions.

D Choose the response that fits

Choose one response for each situation. Preserve the facts, the decision boundary, and the purpose of the exchange.

1. Which response respects both Luis and the policy?

- A.** You seem confident, so the checks no longer matter.
- B.** Drive now and complete the records afterward.
- C.** A good volunteer would ignore the boundary.
- D.** Thank you; I will seek authorized cover while you continue the approved packing work.

2. What does finishing a training course establish by itself?

- A.** Completion of the organization-specific driving assessment
- B.** Automatic inclusion on the authorized-driver roster
- C.** Completion of that course, not necessarily final authorization
- D.** Provisional permission to drive until assessment

3. A colleague needs the term for this meaning: The process of preparing someone to join an organization or role. Which term fits?

- A.** training completion
- B.** onboarding
- C.** reasonable adjustment
- D.** roster

D Choose the response that fits / continued

4. Rebuild the exchange from "An enthusiastic offer is not a driving authorization". Luis: "I see. I was trying to keep the delivery moving, not put you on the spot. What can I do now that will actually help?" Grace: [missing response] Luis: "Is there a list you can check, or does the decision depend on who happens to be coordinating the shift?" Which response belongs in the gap?

- A.** Your offer is helpful. Maintaining this role boundary is not a judgment about your intentions. We need to arrange the delivery through the appropriate person while keeping your approved work moving.
- B.** Experience is relevant, but the authorization is separate. Our policy permits only currently authorized drivers to use the van, even for a short delivery or when the normal driver is unavailable.
- C.** You can request a role expansion. I can explain the organization-specific checks, assessment, and decision process. I cannot promise that the request will be approved or give you an approval date today.
- D.** I will contact the transport lead for authorized cover. We may need to revise the delivery arrangement, but urgency does not give either of us permission to bypass the requirement.

[Answers and explanations, page 144](#)

One useful distinction

Experience, training completion, demonstrated competence, and authorization are related but distinct. Luis may have driving experience without holding permission to use this organization van. Finishing a course also need not complete every assessment or approval requirement.

E Conversation

An enthusiastic offer is not a driving authorization

An enthusiastic offer is not a driving authorization

Complete the numbered gaps. Use each bank entry once; some entries contain several words.

WORD AND PHRASE BANK

role boundary / roster / authorization register / Training completion / task allocation / competency assessment / transport lead / authorization / role expansion / scope of role

- 01 **Luis:** We are short a driver, and the boxes are nearly ready. I have driven vans before. Could I cover this delivery, or do you need to check my role first?
- 02 **Grace:** Thank you for offering. Your current ¹ _____ covers packing and stock counting. I do not have a record that you are authorized to drive our organization vehicle.
- 03 **Luis:** I understand that it is outside my usual tasks, but I have plenty of ordinary driving experience. Is that not enough for a short trip?
- 04 **Grace:** Experience is relevant, but the ² _____ is separate. Our policy permits only currently authorized drivers to use the van, even for a short delivery or when the normal driver is unavailable.
- 05 **Luis:** I see. I was trying to keep the delivery moving, not put you on the spot. What can I do now that will actually help?
- 06 **Grace:** Your offer is helpful. Maintaining this ³ _____ is not a judgment about your intentions. We need to arrange the delivery through the appropriate person while keeping your approved work moving.

E Conversation / continued

- 07 **Luis:** Is there a list you can check, or does the decision depend on who happens to be coordinating the shift?
- 08 **Grace:** We use the ⁴ _____. I need a current record, not an assumption based on familiarity or confidence. Nothing in your current role record establishes the required driving approval.
- 09 **Luis:** Then who can arrange another driver? I can finish the packing while you find out.
- 10 **Grace:** I will contact the ⁵ _____ for authorized cover. We may need to revise the delivery arrangement, but urgency does not give either of us permission to bypass the requirement.

Conversation continues on the next page.

An enthusiastic offer is not a driving authorization

CONVERSATION / CONTINUED

- 11 **Luis:** I would like to help with driving in future. Could we make that part of my role instead of having this problem again?
- 12 **Grace:** You can request a ⁶ _____. I can explain the organization-specific checks, assessment, and decision process. I cannot promise that the request will be approved or give you an approval date today.
- 13 **Luis:** If I complete the training, would that mean I can start driving on the next shift?
- 14 **Grace:** Not necessarily. ⁷ _____ is one step. We must also establish which assessment and approval requirements remain, rather than treating a course certificate as permission to undertake every task.
- 15 **Luis:** So the assessment is about demonstrating the required ability, and the final authorization records permission to take on the duty.
- 16 **Grace:** Exactly. The ⁸ _____ checks the relevant task requirements. The process should also explain what support or appropriate adjustments can be discussed, without promising a particular result.
- 17 **Luis:** For today, I will stay with packing and stock counting. Please tell me if there is another task within my current role that would help.
- 18 **Grace:** I will confirm the ⁹ _____ for this shift. That lets us use your help effectively while the transport lead handles the replacement arrangement and any necessary schedule change.
- 19 **Luis:** Once another driver is confirmed, I can help the team prepare the correctly labeled packages for collection.
- 20 **Grace:** Good. We will update the ¹⁰ _____ after the authorized cover is confirmed. We can also arrange a separate conversation about your interest in the driving role, without confusing that future request with today's permission.

CHECK THE GAPS

1. scope of role / 2. authorization / 3. role boundary / 4. authorization register / 5. transport lead / 6. role expansion / 7. Training completion / 8. competency assessment / 9. task allocation / 10. roster

[Why these answers fit, page 145](#)

F Check accuracy and scope

An enthusiastic offer is not a driving authorization

Return to the case

Food-support volunteer Luis is approved for packing and stock counting. A driver becomes unavailable before a delivery, and Luis offers to drive the organization van. Coordinator Grace has no record that Luis has completed the organization-specific driving checks, assessment, or authorization. His ordinary driving experience does not replace those requirements. The fictional policy allows only currently authorized drivers to use the van. Grace must keep Luis within his approved role, contact the transport lead for authorized cover, and explain how he can request assessment for a future driving role without promising approval.

Choose one answer per question. Use the case facts and keep any uncertainty or limits intact.

1. Who should Grace contact for replacement transport?

- A. The community to certify his driving
- B. The transport lead
- C. An unrelated donor to waive the policy
- D. Luis alone to approve himself

2. Which future-role statement is accurate?

- A. You may request assessment, but approval is not guaranteed.
- B. Asking makes you authorized immediately.
- C. Personal experience replaces every organization-specific check.
- D. The delivery deadline guarantees a pass.

[Answers and explanations, page 147](#)

Listen for the distinction

Swap roles for turns 11-20 and distinguish training, assessment, and authorization.

Appreciation and boundaries can coexist

A volunteer may interpret a refusal as distrust or ingratitude. Recognize the offer and explain the role-based requirement without making the person defend their character. Give an appropriate current task and a clear route to request a broader role later.

F Say it / transfer to a new case

Keep another volunteer within an approved role

Maya is approved for reception duties, not home visits. She offers to visit a client alone when a colleague cancels. The coordinator must seek authorized cover and can explain the future role-assessment process, without guaranteeing approval.

Complete the four gaps. With a partner, read alternate roles, then switch. Studying alone, read both roles and pause before each response.

WORD AND PHRASE BANK

reception duties / role-assessment process / guaranteed / authorized cover

- 01 **Coordinator:** Your current approved work is ¹ _____.
- 02 **Maya:** Today's replacement arrangement needs ² _____.
- 03 **Coordinator:** A future expanded role requires the ³ _____.
- 04 **Maya:** Applying does not mean that approval is ⁴ _____.

CHECK THE GAPS

1. reception duties / 2. authorized cover / 3. role-assessment process / 4. guaranteed

[Why these answers fit, page 147](#)

F Say it / transfer to a new case / continued

Rebuild the exchange

Choose the missing response. Read the completed three-turn exchange aloud, changing roles on the second reading.

1. Rebuild the exchange from "An enthusiastic offer is not a driving authorization". Luis: "If I complete the training, would that mean I can start driving on the next shift?" Grace: [missing response] Luis: "So the assessment is about demonstrating the required ability, and the final authorization records permission to take on the duty." Which response belongs in the gap?

- A.** Thank you for offering. Your current scope of role covers packing and stock counting. I do not have a record that you are authorized to drive our organization vehicle.
- B.** We use the authorization register. I need a current record, not an assumption based on familiarity or confidence. Nothing in your current role record establishes the required driving approval.
- C.** I will confirm the task allocation for this shift. That lets us use your help effectively while the transport lead handles the replacement arrangement and any necessary schedule change.
- D.** Not necessarily. Training completion is one step. We must also establish which assessment and approval requirements remain, rather than treating a course certificate as permission to undertake every task.

[Answers and explanations, page 148](#)

Review 3 / Meaning and context

Use language from the lessons you have completed. Choose one answer per question.

Case file

Revisit "Safeguarding and Incident Reporting" and "Volunteer Management and Training". Choose precise terminology, then reconstruct the missing responses using both neighboring turns. The final two questions also revisit earlier conversations.

1. A colleague needs the term for this meaning: A person's communication of information about an experience or event. Which term fits?

- A. disclosure
- B. designated lead
- C. factual record
- D. professional boundary

2. A colleague needs the term for this meaning: Demonstrated ability to perform a task appropriately. Which term fits?

- A. escalation route
- B. competence
- C. refresher training
- D. role description

3. Rebuild the exchange from "A partner changes the visit, but the community has not agreed". Nadia: "There could be an extra charge. We should know that before telling the partner that the revised arrangements are settled." Ben: [missing response] Nadia: "When can you give the coordinator that information? The partner is waiting for a response, and we need a realistic next update." Which response belongs in the gap?

- A. Good. Put those updates in the coordination log. The deadline is for an accurate status report, not a promise that the revised visit will definitely be approved by then.
- B. I will check the change fee and any other relevant terms. Neither of us can approve additional spending, so I will identify what needs to go to the authorized approver.
- C. Then the twelfth is still the proposed date. The partner's availability does not tell us whether the community can attend or whether the practical arrangements can move with them.
- D. I am the action owner for transport. I will report availability and terms by fifteen hundred local time, even if the provider has not yet confirmed every detail.

Review 3 / Meaning and context / continued

4. Rebuild the exchange from "An enthusiastic offer is not a driving authorization".

Luis: "For today, I will stay with packing and stock counting. Please tell me if there is another task within my current role that would help." Grace: [missing response]

Luis: "Once another driver is confirmed, I can help the team prepare the correctly labeled packages for collection." Which response belongs in the gap?

- A.** Not necessarily. Training completion is one step. We must also establish which assessment and approval requirements remain, rather than treating a course certificate as permission to undertake every task.
- B.** I will confirm the task allocation for this shift. That lets us use your help effectively while the transport lead handles the replacement arrangement and any necessary schedule change.
- C.** We use the authorization register. I need a current record, not an assumption based on familiarity or confidence. Nothing in your current role record establishes the required driving approval.
- D.** Thank you for offering. Your current scope of role covers packing and stock counting. I do not have a record that you are authorized to drive our organization vehicle.

[Answers and explanations, page 165](#)

A Read the situation

LESSON 07 / ADVOCACY, PUBLIC MESSAGING, AND NEUTRALITY

Challenge an unsupported public claim, preserve the original population and time frame, and distinguish policy advocacy from party endorsement.

An alarming headline changes the meaning of an old survey

Fundraiser Maya drafts a headline: one in three local children is hungry tonight. Communications officer Theo traces the number to a fictional 2018 regional survey of 80 self-selected adult respondents. Twenty-seven reported concern about having enough food during the previous month. The survey did not measure current hunger among local children, and its representativeness is unknown. The organization permits evidence-based policy advocacy but has its own nonpartisan rule against endorsing parties. Maya and Theo must remove or accurately qualify the statistic, retain a clear mission-focused request, and avoid unsupported urgency or partisan endorsement.

People: Maya, Fundraiser; Theo, Communications officer.

Read the record

Choose one answer per question using the facts above.

1. Who answered the original survey?

- A. Eighty self-selected adult respondents in the region
- B. All local children
- C. A representative national child sample
- D. Every current service user

2. What did 27 respondents report?

- A. Verified hunger among children tonight
- B. Current food deprivation across the whole town
- C. A diagnosis made by the organization
- D. Concern about enough food during the previous month

3. What does the organization's own policy allow?

- A. Evidence-based policy advocacy without party endorsement
- B. Endorsement of any party that supports the mission
- C. Replacement of evidence with an urgent headline
- D. Treating all NGOs as legally identical

[Answers and explanations, page 149](#)

B Vocabulary in use

CORE TERMS

advocacy

Communication seeking change in policy, practice, or public attention.

support evidence-based advocacy

fundraising appeal

A request for financial or other support.

prepare a fundraising appeal

source attribution

Identifying where information came from.

provide source attribution

respondent

A person who provides answers to a survey.

count survey respondents

representativeness

How well a sample reflects the relevant wider population.

assess representativeness

time frame

The period to which a measurement or claim refers.

preserve the time frame

public messaging

Communication intended for an external audience.

review public messaging

claim substantiation

Evidence supporting what a statement asserts.

check claim substantiation

survey population

The defined group a survey concerns.

describe the survey population

self-selection

Entry into a sample through people's own decision to participate.

disclose self-selection

denominator

The total quantity used as the base of a proportion.

identify the denominator

question wording

The exact phrasing used to collect a survey response.

check question wording

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

advocacy **ADVOCACY**

support evidence-based advocacy

Keep the meaning precise: Communication seeking change in policy, practice, or public attention.

survey population **SURVEY POPULATION**

describe the survey population

Keep the meaning precise: The defined group a survey concerns.

B Precision and professional shorthand

EXTEND YOUR RANGE

historical finding

A result referring to an earlier period.

label a historical finding

qualifier

Wording that specifies the limits or conditions of a statement.

add a material qualifier

call to action

A clear request for what an audience should do next.

state the call to action

party endorsement

An expression of support for a political party.

avoid party endorsement

informed consent

Agreement based on relevant information about the proposed use or action.

obtain informed consent

editorial approval

Authorization of material through the relevant publication process.

obtain editorial approval

extrapolation

Extending a finding beyond the observations or population measured.

avoid unsupported extrapolation

headline

The prominent title summarizing a message.

revise the headline

nonpartisan

Not supporting or opposing political parties under the relevant meaning or policy.

maintain a nonpartisan position

policy position

An organization's stated view on a public issue or proposed measure.

explain the policy position

dignity

Respect for a person's worth and agency.

preserve participant dignity

correction notice

A statement identifying and correcting published misinformation.

issue a correction notice

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

question wording QUESTION WORDING

check question wording

Keep the meaning precise: The exact phrasing used to collect a survey response.

call to action CALL TO ACTION

state the call to action

Keep the meaning precise: A clear request for what an audience should do next.

Phrases that move the work forward

Pause publication

This headline needs an evidence check before release.

Name the population

The survey involved eighty self-selected adult respondents.

Restore the question

Respondents reported concern about enough food during the previous month.

Keep arithmetic separate

The proportion is roughly one third, but the headline still changes the claim.

Avoid attribution as a shield

Adding a source name does not make the revised claim accurate.

Retain the request

We can make a clear call to action without inventing a current prevalence figure.

Maintain the policy boundary

Our nonpartisan rule does not permit endorsing a party.

Protect dignity

Describe people as individuals with agency, not as fundraising props.

Trace the figure

What is the original source for one in three?

Restore the date

The finding comes from a regional survey in two thousand eighteen.

Reject the population change

That does not establish current hunger among local children.

Question extrapolation

We do not know whether these respondents represent the wider population.

Choose a clear correction

Remove the statistic or state the historical finding with its essential limits.

Explain advocacy

We can argue for a policy change using appropriately supported evidence.

Respect story ownership

Check informed consent and the intended use before publishing someone's story.

Close the review

Approve wording that is accurate in the headline as well as the supporting text.

Precision in real exchanges

Purpose: Restore the date

Useful wording: The finding comes from a regional survey in two thousand eighteen.

Purpose: Restore the question

Useful wording: Respondents reported concern about enough food during the previous month.

D Choose the response that fits

Choose one response for each situation. Preserve the facts, the decision boundary, and the purpose of the exchange.

1. Which statement accurately reflects the source?

- A.** In the 2018 regional survey, 27 of 80 self-selected adult respondents reported past-month food concerns.
- B.** One in three local children is hungry tonight.
- C.** All families in the country lack food.
- D.** The survey proves the current cause of child hunger.

2. Does adding a citation rescue the original headline?

- A.** Yes; the date can be hidden.
- B.** Yes; respondents and children are interchangeable.
- C.** No; attribution does not correct its changed population and time frame.
- D.** Yes; any attributed statement is accurate.

3. A colleague needs the term for this meaning: Evidence supporting what a statement asserts. Which term fits?

- A.** representativeness
- B.** qualifier
- C.** claim substantiation
- D.** informed consent

D Choose the response that fits / continued

4. Rebuild the exchange from "An alarming headline changes the meaning of an old survey". Maya: "Can you read me the actual question? We have shortened this copy three times. I suspect we have shortened away something essential." Theo: [missing response] Maya: "And we cannot turn a finding from two thousand eighteen into a claim about tonight without current evidence." Which response belongs in the gap?

- A.** Exactly. That would remain unsupported extrapolation. Either remove the statistic or state the historical result with its essential limits. A citation is not permission to change the evidence.
- B.** The question wording concerned whether respondents had worried about having enough food during the previous month. It did not establish that children were hungry on a particular night.
- C.** Then editorial approval can address the actual message as a whole. The headline, story, policy position, and supporting evidence should tell a consistent account that we can defend.
- D.** The denominator supports that approximate proportion among respondents. But correct arithmetic cannot fix a change in who was measured, what they were asked, or when the finding applies.

[Answers and explanations, page 149](#)

One useful distinction

Twenty-seven of eighty is 33.75%, roughly one third of those respondents. That arithmetic does not validate the headline. Adults are not children, the region is not necessarily the local area, past-month concern is not measured hunger tonight, and the sample is not established as representative.

Conversation

An alarming headline changes the meaning of an old survey

An alarming headline changes the meaning of an old survey

Complete the numbered gaps. Use each bank entry once; some entries contain several words.

WORD AND PHRASE BANK

extrapolation / call to action / time frame / self-selection / editorial approval /
question wording / informed consent / policy position / source attribution / denominator

- 01 **Maya:** Before this appeal goes out, I need the source behind one in three local children is hungry tonight. It is our lead claim, and I cannot trace it from the draft.
- 02 **Theo:** I traced the ¹ _____ to a regional survey from two thousand eighteen. It involved eighty adult respondents, not a survey of local children or a current count of hunger.
- 03 **Maya:** The number came from twenty-seven responses out of eighty. That is roughly one third, so is the calculation at least correct?
- 04 **Theo:** The ² _____ supports that approximate proportion among respondents. But correct arithmetic cannot fix a change in who was measured, what they were asked, or when the finding applies.
- 05 **Maya:** Can you read me the actual question? We have shortened this copy three times. I suspect we have shortened away something essential.
- 06 **Theo:** The ³ _____ concerned whether respondents had worried about having enough food during the previous month. It did not establish that children were hungry on a particular night.

E Conversation / continued

- 07 **Maya:** And we cannot turn a finding from two thousand eighteen into a claim about tonight without current evidence.
- 08 **Theo:** Correct. The ⁴ _____ is material to the meaning. We need to restore it if we use the result, rather than place an old date in a footnote under a current-sounding headline.
- 09 **Maya:** Do we know how the eighty people were selected? I do not want to imply that they represent every household in the region.
- 10 **Theo:** They joined through ⁵ _____. We do not know whether they represent the wider population. The result describes those respondents, and the method limits how far we can extend it.

Conversation continues on the next page.

An alarming headline changes the meaning of an old survey

CONVERSATION / CONTINUED

- 11 **Maya:** So adding the source name would not rescue the original headline. It would still make a different claim from the underlying finding.
- 12 **Theo:** Exactly. That would remain unsupported ⁶ _____. Either remove the statistic or state the historical result with its essential limits. A citation is not permission to change the evidence.
- 13 **Maya:** A fully qualified historical finding may be too cumbersome for the headline. I would rather remove it and explain the work clearly.
- 14 **Theo:** We can retain a strong ⁷ _____. State the support being requested and the work it will fund, using verified facts. Urgency should come from the actual need, not a claim we cannot substantiate.
- 15 **Maya:** The appeal also supports an access reform. A colleague thinks our nonpartisan rule means we cannot discuss any policy issue.
- 16 **Theo:** Our ⁸ _____ can support an evidence-based reform. This organization's rule separates issue advocacy from endorsing parties; it does not require silence on every public policy question.
- 17 **Maya:** We also have a participant story available. I will check whether the proposed fundraising use is covered, rather than assume service participation gives permission.
- 18 **Theo:** Check ⁹ _____ and the intended use, and preserve the person's dignity. Do not add an alarming detail simply because it might make the appeal more compelling.
- 19 **Maya:** I will remove the unsupported headline, keep a clear request, and send the revised wording through the publication process.
- 20 **Theo:** Then ¹⁰ _____ can address the actual message as a whole. The headline, story, policy position, and supporting evidence should tell a consistent account that we can defend.

CHECK THE GAPS

1. source attribution / 2. denominator / 3. question wording / 4. time frame / 5. self-selection / 6. extrapolation / 7. call to action / 8. policy position / 9. informed consent / 10. editorial approval

[Why these answers fit, page 150](#)

F Check accuracy and scope

An alarming headline changes the meaning of an old survey

Return to the case

Fundraiser Maya drafts a headline: one in three local children is hungry tonight. Communications officer Theo traces the number to a fictional 2018 regional survey of 80 self-selected adult respondents. Twenty-seven reported concern about having enough food during the previous month. The survey did not measure current hunger among local children, and its representativeness is unknown. The organization permits evidence-based policy advocacy but has its own nonpartisan rule against endorsing parties. Maya and Theo must remove or accurately qualify the statistic, retain a clear mission-focused request, and avoid unsupported urgency or partisan endorsement.

Choose one answer per question. Use the case facts and keep any uncertainty or limits intact.

1. Which advocacy sentence fits the stated nonpartisan rule?

- A. Every nonprofit worldwide must adopt our exact policy.
- B. We support the proposed access reform on the evidence, without endorsing a party.
- C. Donate only if you vote for our preferred party.
- D. Our mission automatically exempts us from our own rule.

2. What should accompany use of a participant story?

- A. The relevant consent and dignity checks for its intended publication
- B. An assumption that receiving support means agreeing to publicity
- C. A more alarming invented detail
- D. Removal of the participant's agency

[Answers and explanations, page 152](#)

Listen for the distinction

Swap roles for turns 11-20 and retain a clear appeal without the unsupported headline.

Urgency does not require distortion

A fundraising message can be forceful without changing who was measured or when. Separate the emotional force of the issue from the strength of the evidence. A precise correction can protect the mission and the dignity of the people described, not merely reduce legal or reputational exposure.

F Say it / transfer to a new case

Keep a survey claim within its evidence

A 2020 survey of 60 self-selected adult service users found 18 reported transport difficulties in the previous month. It did not measure current difficulties among all city residents.

Complete the four gaps. With a partner, read alternate roles, then switch. Studying alone, read both roles and pause before each response.

WORD AND PHRASE BANK

previous month / 30% / 2020 / 60 respondents

- 01 **Editor:** The survey year is ¹ _____.
- 02 **Analyst:** The denominator is ² _____.
- 03 **Editor:** The proportion reporting difficulties is ³ _____.
- 04 **Analyst:** The question's reference period was the ⁴ _____.

CHECK THE GAPS

1. 2020 / 2. 60 respondents / 3. 30% / 4. previous month

[Why these answers fit, page 152](#)

Rebuild the exchange

Choose the missing response. Read the completed three-turn exchange aloud, changing roles on the second reading.

1. Rebuild the exchange from "An alarming headline changes the meaning of an old survey". Maya: "A fully qualified historical finding may be too cumbersome for the headline. I would rather remove it and explain the work clearly." Theo: [missing response] Maya: "The appeal also supports an access reform. A colleague thinks our nonpartisan rule means we cannot discuss any policy issue." Which response belongs in the gap?

- A.** I traced the source attribution to a regional survey from two thousand eighteen. It involved eighty adult respondents, not a survey of local children or a current count of hunger.
- B.** Correct. The time frame is material to the meaning. We need to restore it if we use the result, rather than place an old date in a footnote under a current-sounding headline.
- C.** We can retain a strong call to action. State the support being requested and the work it will fund, using verified facts. Urgency should come from the actual need, not a claim we cannot substantiate.
- D.** They joined through self-selection. We do not know whether they represent the wider population. The result describes those respondents, and the method limits how far we can extend it.

[Answers and explanations, page 153](#)

A Read the situation

LESSON 08 / BOARD REPORTING AND SUSTAINABILITY

Explain restricted cash, available funds, a simplified runway calculation, and the board decision needed before using a reserve buffer.

Cash in the account is not all available for the shortfall

Harbor Outreach has \$180,000 cash. Of this, \$120,000 is restricted to a separate program and cannot fund the operating shortfall in this scenario. The remaining \$60,000 is unrestricted and available after other commitments. Net unrestricted cash outflow is assumed to remain \$20,000 each month. A proposed \$50,000 donation is not confirmed and has no payment date. The board has set its own reserve floor at \$20,000. Finance lead Asha and board chair Peter must distinguish three months to cash exhaustion from two months to that floor, then request a decision on options and review triggers.

People: Asha, Finance lead; Peter, Board chair.

Read the record

Choose one answer per question using the facts above.

1. How much is available for this operating shortfall?

- A. \$120,000
- B. \$230,000
- C. \$60,000
- D. \$180,000

2. How long until the stated reserve floor is reached?

- A. Five months because the donation is confirmed
- B. Two months under the constant-outflow assumption
- C. Nine months
- D. Three months to the floor

3. How should the proposed donation be treated?

- A. As a guaranteed cure for the shortfall
- B. As unconfirmed, without an assumed receipt date
- C. As cash already in the bank
- D. As permission to use restricted funds

[Answers and explanations, page 154](#)

B Vocabulary in use

CORE TERMS

board paper

A document presenting information or a decision for a governing board.

prepare a board paper

unrestricted fund

Resources not subject to a specified external purpose restriction.

distinguish unrestricted funds

reserve policy

An organization's approach to holding and using a financial buffer.

explain the reserve policy

free reserves

Unrestricted resources available to spend after relevant exclusions.

assess free reserves

net cash outflow

Cash paid out minus cash received over a specified period.

forecast net cash outflow

liquidity

Ability to meet payments when they fall due.

monitor liquidity

restricted fund

Resources limited to specified purposes under the applicable terms.

respect restricted funds

available funds

Resources usable for the stated purpose after relevant restrictions and commitments.

identify available funds

reserve floor

A defined lower threshold under the organization's policy.

monitor the reserve floor

cash balance

Money held in the stated accounts at a point in time.

reconcile the cash balance

cash runway

The estimated period before defined available cash is exhausted under stated assumptions.

calculate cash runway

funding gap

A shortfall between available funding and required resources.

explain the funding gap

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

board paper BOARD PAPER

prepare a board paper

Keep the meaning precise: A document presenting information or a decision for a governing board.

reserve floor RESERVE FLOOR

monitor the reserve floor

Keep the meaning precise: A defined lower threshold under the organization's policy.

B Precision and professional shorthand

EXTEND YOUR RANGE

pledge

A promise of future support, with its conditions and payment terms specified; not merely an expression of interest.

verify a donor pledge

sensitivity analysis

Examination of how a result changes when assumptions change.

run a sensitivity analysis

drawdown

Use of an available balance over time.

authorize a reserve drawdown

commitment

An obligation or planned use relevant to available resources.

account for existing commitments

service continuity

Ability to maintain the relevant service over time.

protect service continuity

forecast assumption

A condition used when projecting future figures.

disclose forecast assumptions

scenario planning

Comparing defined possible future conditions and responses.

use scenario planning

designated fund

Unrestricted resources earmarked internally, subject to the applicable governance rules.

explain a designated fund

cost reduction

A decrease in spending with its timing and consequences specified.

evaluate a cost reduction

decision authority

The right to approve a specified action.

confirm decision authority

B Precision and professional shorthand / continued

review trigger

A defined event or threshold requiring reconsideration.

set a review trigger

replenishment plan

An approach for rebuilding a used financial buffer.

agree a replenishment plan

Say it in context

Stress the highlighted expression. Keep the surrounding words connected; pause at the end of the phrase.

funding gap FUNDING GAP

explain the funding gap

Keep the meaning precise: A shortfall between available funding and required resources.

drawdown DRAWDOWN

authorize a reserve drawdown

Keep the meaning precise: Use of an available balance over time.

Phrases that move the work forward

Separate the categories

Of the cash balance, one hundred twenty thousand is restricted to another program.

State the assumption

We assume net unrestricted outflow remains twenty thousand a month.

Name the earlier threshold

We reach the board's twenty-thousand reserve floor after two months.

Keep support provisional

The proposed donation is unconfirmed and has no payment date.

Explain uncertainty

The timing and amount of future receipts could change the projection.

Describe a cost option

State when the saving begins and which services it affects.

Check authority

Which decision can management take, and which requires the board?

Plan recovery

A drawdown proposal should explain how the buffer could be rebuilt.

State the usable amount

Sixty thousand is available for this shortfall after other commitments.

Calculate exhaustion

On that assumption, available cash lasts three months.

Reject the misleading total

Nine months would incorrectly include restricted money.

Separate scenarios

Show the donation scenario separately from the base case.

Make the decision explicit

The board needs to choose an authorized response before the threshold is reached.

Avoid relabeling

We cannot remove a funding restriction by changing an internal label.

Set the trigger

Review the plan if receipts or outflows depart from the stated assumptions.

Close the report

Report the available amount, time to floor, options, and next decision date together.

Precision in real exchanges

Purpose: Calculate exhaustion

Useful wording: On that assumption, available cash lasts three months.

Purpose: Name the earlier threshold

Useful wording: We reach the board's twenty-thousand reserve floor after two months.

D Choose the response that fits

Choose one response for each situation. Preserve the facts, the decision boundary, and the purpose of the exchange.

1. Which runway statement is accurate?

- A.** Nine months to exhaustion using all cash
- B.** Three months to the floor and two to exhaustion
- C.** Unlimited runway because a donation is proposed
- D.** Three months to exhaustion and two months to the reserve floor under the stated assumption

2. Which presentation handles the proposed \$50,000 appropriately?

- A.** Assume it arrives before the next payment.
- B.** Treat its proposed amount as an authorized grant transfer.
- C.** Show it as a separate unconfirmed scenario with uncertain timing.
- D.** Add it to today's available cash.

3. A colleague needs the term for this meaning: Resources usable for the stated purpose after relevant restrictions and commitments. Which term fits?

- A.** net cash outflow
- B.** sensitivity analysis
- C.** service continuity
- D.** available funds

D Choose the response that fits / continued

4. Rebuild the exchange from "Cash in the account is not all available for the shortfall". Peter: "The current projection assumes that the available balance falls by twenty thousand each month. Does that already allow for normal receipts?" Asha: [missing response] Peter: "Sixty divided by twenty gives three months. We should distinguish that from the board's twenty-thousand lower threshold." Which response belongs in the gap?

- A.** Yes, it is net cash outflow, not just gross spending. We are assuming it stays at twenty thousand a month. That assumption should remain visible wherever we show the forecast.
- B.** The available funds are sixty thousand dollars. The paper for the board needs to start with that figure, not the total bank balance, so the timing is not falsely reassuring.
- C.** Correct. The simplified cash runway to exhaustion is three months. But the board's own reserve floor is reached earlier, after forty thousand has been used, which is two months.
- D.** Not for this purpose. One hundred twenty thousand is a restricted fund for a separate program. We cannot include it in the amount available to cover this operating gap.

[Answers and explanations, page 154](#)

One useful distinction

The simplified runway is \$60,000 divided by \$20,000: three months to exhaust available cash if the assumption holds. Reaching the \$20,000 reserve floor takes only two months. Nine months incorrectly treats the full \$180,000 bank balance as usable for this shortfall.

E Conversation

Cash in the account is not all available for the shortfall

Cash in the account is not all available for the shortfall

Complete the numbered gaps. Use each bank entry once; some entries contain several words.

WORD AND PHRASE BANK

replenishment plan / cost reduction / reserve policy / review trigger / restricted fund /
net cash outflow / available funds / drawdown / prospective gift / cash runway

- 01 **Peter:** The headline says a hundred eighty thousand in the bank, so people are reading that as nine months at twenty thousand a month. What are we missing?
- 02 **Asha:** Not for this purpose. One hundred twenty thousand is a ¹ _____ for a separate program. We cannot include it in the amount available to cover this operating gap.
- 03 **Peter:** Then what amount can we actually use, after accounting for the other obligations already identified?
- 04 **Asha:** The ² _____ are sixty thousand dollars. The paper for the board needs to start with that figure, not the total bank balance, so the timing is not falsely reassuring.
- 05 **Peter:** The current projection assumes that the available balance falls by twenty thousand each month. Does that already allow for normal receipts?
- 06 **Asha:** Yes, it is ³ _____, not just gross spending. We are assuming it stays at twenty thousand a month. That assumption should remain visible wherever we show the forecast.

E Conversation / continued

- 07 **Peter:** Sixty divided by twenty gives three months. We should distinguish that from the board's twenty-thousand lower threshold.
- 08 **Asha:** Correct. The simplified ⁴ _____ to exhaustion is three months. But the board's own reserve floor is reached earlier, after forty thousand has been used, which is two months.
- 09 **Peter:** So the floor is a decision threshold under our policy, not a claim that every organization needs the same amount in reserve.
- 10 **Asha:** Exactly. Our ⁵ _____ sets that threshold. We should not wait until the third month and then act surprised that we passed the board's floor a month earlier.

Conversation continues on the next page.

Cash in the account is not all available for the shortfall

CONVERSATION / CONTINUED

- 11 **Peter:** The proposed fifty-thousand donation is also on the slide. I do not want people mentally adding it to the bank balance before there is a commitment.
- 12 **Asha:** The ⁶ _____ is not a confirmed pledge and has no payment date. Show it separately, not as cash already available in the base calculation.
- 13 **Peter:** We need options that explain more than a number. A reduction could take time to implement or affect services differently.
- 14 **Asha:** A ⁷ _____ should show when savings begin, the effect on services, and any relevant commitments. An immediate-looking saving is misleading if the outflow changes only after several months.
- 15 **Peter:** Another option may involve using part of the buffer under an approved plan. We would need to explain the authority and recovery path.
- 16 **Asha:** Any proposed ⁸ _____ needs the appropriate decision and its conditions. It does not authorize us to relabel the restricted program money or assume that an uncertain donation will restore the balance.
- 17 **Peter:** Let us include a point at which the board revisits the plan if receipts are late or the outflow is higher.
- 18 **Asha:** Set a clear ⁹ _____, alongside the next decision date. That turns the forecast into a monitored plan rather than a single reassuring number presented without conditions.
- 19 **Peter:** I will ask for a paper showing the available amount, two-month threshold, three-month exhaustion point, and the consequences of each authorized option.
- 20 **Asha:** Include a ¹⁰ _____ where a buffer would be used. The board should see what would rebuild it and which assumptions still need confirmation before choosing a response.

CHECK THE GAPS

1. restricted fund / 2. available funds / 3. net cash outflow / 4. cash runway / 5. reserve policy / 6. prospective gift / 7. cost reduction / 8. drawdown / 9. review trigger / 10. replenishment plan

[Why these answers fit, page 155](#)

F Check accuracy and scope

Cash in the account is not all available for the shortfall

Return to the case

Harbor Outreach has \$180,000 cash. Of this, \$120,000 is restricted to a separate program and cannot fund the operating shortfall in this scenario. The remaining \$60,000 is unrestricted and available after other commitments. Net unrestricted cash outflow is assumed to remain \$20,000 each month. A proposed \$50,000 donation is not confirmed and has no payment date. The board has set its own reserve floor at \$20,000. Finance lead Asha and board chair Peter must distinguish three months to cash exhaustion from two months to that floor, then request a decision on options and review triggers.

Choose one answer per question. Use the case facts and keep any uncertainty or limits intact.

1. What is wrong with relabeling the restricted \$120,000 as operating reserves?

- A. A board paper automatically changes donor terms.
- B. A large balance cannot be restricted.
- C. Restricted means already spent.
- D. An internal label does not remove the stated restriction.

2. What makes a cost-reduction option decision-ready?

- A. A promise that every service stays unchanged without evidence
- B. A generic instruction to be more sustainable
- C. Timing, expected savings, service effects, authority, and a review trigger
- D. A saving amount with no start date or consequences

[Answers and explanations, page 157](#)

Listen for the distinction

Swap roles for turns 11-20 and keep the prospective donation separate from available money.

Give the board a decision, not a reassuring total

A large bank balance can hide a shortage in the funds available for a particular purpose. Present the usable amount, assumptions, timing, and authority clearly. A concise choice with consequences and a review date is more useful than a confident headline that combines incompatible funding categories.

F Say it / transfer to a new case

Explain another usable buffer

An organization has \$150,000 cash: \$90,000 restricted to another purpose and \$60,000 available after commitments. Net outflow is assumed constant at \$15,000 monthly. Its own reserve floor is \$30,000. Ignore unconfirmed future donations.

Complete the four gaps. With a partner, read alternate roles, then switch. Studying alone, read both roles and pause before each response.

WORD AND PHRASE BANK

four months / \$15,000 / \$60,000 / two months

- 01 **Chair:** Cash available for this shortfall is ¹ _____.
- 02 **Officer:** Monthly net outflow is ² _____.
- 03 **Chair:** Time to exhaust the available cash is ³ _____.
- 04 **Officer:** Time to reach the reserve floor is ⁴ _____.

CHECK THE GAPS

1. \$60,000 / 2. \$15,000 / 3. four months / 4. two months

[Why these answers fit, page 157](#)

F Say it / transfer to a new case / continued

Rebuild the exchange

Choose the missing response. Read the completed three-turn exchange aloud, changing roles on the second reading.

1. Rebuild the exchange from "Cash in the account is not all available for the shortfall". Peter: "We need options that explain more than a number. A reduction could take time to implement or affect services differently." Asha: [missing response] Peter: "Another option may involve using part of the buffer under an approved plan. We would need to explain the authority and recovery path." Which response belongs in the gap?

- A.** The available funds are sixty thousand dollars. The paper for the board needs to start with that figure, not the total bank balance, so the timing is not falsely reassuring.
- B.** Not for this purpose. One hundred twenty thousand is a restricted fund for a separate program. We cannot include it in the amount available to cover this operating gap.
- C.** Correct. The simplified cash runway to exhaustion is three months. But the board's own reserve floor is reached earlier, after forty thousand has been used, which is two months.
- D.** A cost reduction should show when savings begin, the effect on services, and any relevant commitments. An immediate-looking saving is misleading if the outflow changes only after several months.

[Answers and explanations, page 158](#)

Review 4 / Meaning and context

Use language from the lessons you have completed. Choose one answer per question.

Case file

Revisit "Advocacy, Public Messaging, and Neutrality" and "Board Reporting and Sustainability". Choose precise terminology, then reconstruct the missing responses using both neighboring turns. The final two questions also revisit earlier conversations.

1. A colleague needs the term for this meaning: A request for financial or other support. Which term fits?

- A. policy position
- B. extrapolation
- C. fundraising appeal
- D. self-selection

2. A colleague needs the term for this meaning: Money held in the stated accounts at a point in time. Which term fits?

- A. cash balance
- B. commitment
- C. board paper
- D. pledge

3. Rebuild the exchange from "An enthusiastic offer is not a driving authorization". Luis: "Then who can arrange another driver? I can finish the packing while you find out." Grace: [missing response] Luis: "I would like to help with driving in future. Could we make that part of my role instead of having this problem again?" Which response belongs in the gap?

- A. Experience is relevant, but the authorization is separate. Our policy permits only currently authorized drivers to use the van, even for a short delivery or when the normal driver is unavailable.
- B. Your offer is helpful. Maintaining this role boundary is not a judgment about your intentions. We need to arrange the delivery through the appropriate person while keeping your approved work moving.
- C. Thank you for offering. Your current scope of role covers packing and stock counting. I do not have a record that you are authorized to drive our organization vehicle.
- D. I will contact the transport lead for authorized cover. We may need to revise the delivery arrangement, but urgency does not give either of us permission to bypass the requirement.

Review 4 / Meaning and context / continued

4. Rebuild the exchange from "Cash in the account is not all available for the shortfall". Peter: "Let us include a point at which the board revisits the plan if receipts are late or the outflow is higher." Asha: [missing response] Peter: "I will ask for a paper showing the available amount, two-month threshold, three-month exhaustion point, and the consequences of each authorized option." Which response belongs in the gap?

- A.** Set a clear review trigger, alongside the next decision date. That turns the forecast into a monitored plan rather than a single reassuring number presented without conditions.
- B.** Exactly. Our reserve policy sets that threshold. We should not wait until the third month and then act surprised that we passed the board's floor a month earlier.
- C.** Include a replenishment plan where a buffer would be used. The board should see what would rebuild it and which assumptions still need confirmation before choosing a response.
- D.** Not for this purpose. One hundred twenty thousand is a restricted fund for a separate program. We cannot include it in the amount available to cover this operating gap.

[Answers and explanations, page 168](#)

Language for the next case

The matching pot has a limit

match funding

Match funding adds a sponsor contribution according to agreed terms; this offer matches eligible public gifts dollar for dollar only within its stated limit and window.

Malik: The match funding is dollar for dollar, but the sponsor's commitment stops at eight thousand. We have already reached that limit.

eligibility reconciliation

The eligibility reconciliation checks public transactions against the matching agreement; the exercise explicitly confirms all 10,000 qualifies before applying the 8,000 cap.

Malik: Keep that eligibility reconciliation with the sponsor confirmation. It explains why the requested match is eight thousand, not an unexplained adjustment to our public total.

donor message

The donor message must reflect the exhausted matching allocation; further gifts remain welcome, but the current agreement cannot support a promise that new gifts will also be doubled.

Keiko: The website needs a new donor message. I suggest: Our matching allocation is fully used. Your gift will still support the program, but no further match is available under this appeal.

matching cap

The matching cap is the sponsor's maximum additional contribution, here 8,000; it is not a cap on public gifts or on the combined total.

Malik: Correct. The matching cap limits the sponsor contribution, not what supporters may give. Public donations above the matched amount are still donations.

cash received

Cash received is money that has actually arrived; the public's 10,000 has been received, but the sponsor's confirmed 8,000 remains unpaid.

Malik: Not yet. Ten thousand is cash received. The other eight thousand is confirmed support awaiting payment. Do not combine those statuses under received.

campaign window

The campaign window sets the period for the matching offer, but remaining time does not create additional sponsor capacity after the stated cap has been exhausted.

Keiko: There is still time left in the campaign window. We should explain that the pot can run out before the closing date, rather than imply that matching lasts until the last minute.

Read the phrases aloud. Then complete the conversation on the following pages using the word bank.

Conversation

The matching pot has a limit

Fictional appeal: the sponsor matches eligible public donations dollar for dollar, up to \$8,000, during the stated campaign window. At the review, \$10,000 in eligible public donations has been received; no refunds or fees apply to this calculation. The sponsor confirms the full \$8,000 match is due but has not paid it. New donations remain welcome but cannot attract further match funding under this agreement.

Complete the numbered gaps. Use each bank entry once; some entries contain several words.

WORD AND PHRASE BANK

match funding / cash received / eligibility reconciliation / donor message /
campaign window / matching cap

- 01 **Keiko:** We reached ten thousand in public donations. The homepage still says every gift is doubled. I need to check that message before the next appeal email goes out.
- 02 **Malik:** The ¹ _____ is dollar for dollar, but the sponsor's commitment stops at eight thousand. We have already reached that limit.
- 03 **Keiko:** So ten thousand from the public does not produce another ten thousand from the sponsor. The maximum combined amount on these facts is eighteen thousand.
- 04 **Malik:** Correct. The ² _____ limits the sponsor contribution, not what supporters may give. Public donations above the matched amount are still donations.
- 05 **Keiko:** We checked all ten thousand against the agreement: right window, permitted payment types, and no excluded gifts. There are no refunds in this calculation.
- 06 **Malik:** Keep that ³ _____ with the sponsor confirmation. It explains why the requested match is eight thousand, not an unexplained adjustment to our public total.

Conversation / continued

- 07 **Keiko:** For the campaign report, may I say eighteen thousand received? The sponsor has confirmed the full match is due.
- 08 **Malik:** Not yet. Ten thousand is ⁴ _____. The other eight thousand is confirmed support awaiting payment. Do not combine those statuses under received.
- 09 **Keiko:** I will separate public gifts received, sponsor match confirmed, and sponsor payment pending. That also tells the team what needs following up.
- 10 **Malik:** Good. Check the agreed payment process and actual timing. A confirmed obligation is useful information, but it does not put the money in today's bank balance.

Conversation continues on the next page.

The matching pot has a limit

CONVERSATION / CONTINUED

- 11 **Keiko:** The website needs a new ⁵ _____. I suggest: Our matching allocation is fully used. Your gift will still support the program, but no further match is available under this appeal.
- 12 **Malik:** That reflects the current position. Update the scheduled email and donation-page banner as well, so the old promise does not continue in a different channel.
- 13 **Keiko:** I will preserve the campaign terms and version history. We should know what supporters saw rather than assume changing the homepage fixes every earlier communication.
- 14 **Malik:** Yes. If someone raises a concern about the promise they relied on, use the appropriate supporter-care process. Do not improvise a refund policy in this reconciliation.
- 15 **Keiko:** There is still time left in the ⁶ _____. We should explain that the pot can run out before the closing date, rather than imply that matching lasts until the last minute.
- 16 **Malik:** Exactly. Time and available match funds are separate conditions. A gift can fall within the dates and still attract no additional match once the allocation is used.
- 17 **Keiko:** The team is pleased with the response. We can celebrate ten thousand from supporters and the eight-thousand confirmed match without describing every gift as doubled.
- 18 **Malik:** That is stronger than inflating the result. Eighteen thousand in combined confirmed support is different from twenty thousand, and it is also different from eighteen thousand in cash received.
- 19 **Keiko:** I will correct the live and queued messages, send the sponsor reconciliation, and use the separate totals in the internal update.
- 20 **Malik:** I will track the payment when it arrives. Our record will then show the receipt against the already confirmed match, rather than count it as a second sponsor contribution.

CHECK THE GAPS

1. match funding / 2. matching cap / 3. eligibility reconciliation / 4. cash received / 5. donor message / 6. campaign window

[Why these answers fit, page 170](#)

Reconcile another capped appeal

An appeal matches eligible gifts dollar for dollar up to \$5,000. Public gifts of \$6,200 have been received and all qualify before the cap. The full sponsor match is confirmed but unpaid. Ignore fees and refunds.

Complete the exchange using each phrase once. Read both roles, then switch roles and repeat with the bank covered.

WORD AND PHRASE BANK

5 / 11.2 / 6.2 / zero

- 01 **Fundraiser:** The sponsor match is capped at \$¹ _____ thousand.
- 02 **Officer:** Combined confirmed support is \$² _____ thousand.
- 03 **Fundraiser:** Cash actually received is \$³ _____ thousand.
- 04 **Officer:** Further match capacity under this agreement is ⁴ _____.

CHECK THE GAPS

1. 5 / 2. 11.2 / 3. 6.2 / 4. zero

[Why these answers fit, page 170](#)

Keep the distinction audible

Explain matching conditions and reconcile public donations, sponsor support, and cash actually received.

Language for the next case

The grant budget must cover the work

direct costs

Direct costs in this exercise are 48,000 staff plus 12,000 materials, totaling 60,000; the separately allocated support cost has not been included in that total.

Hugo: Our offer covers the direct costs and a ten-percent indirect allowance. I need to understand how your nine-thousand support allocation relates to that limit.

indirect-cost allowance

The indirect-cost allowance is ten percent of the stipulated 60,000 direct-cost base, or 6,000; the cap does not mean the actual shared costs disappear.

Hugo: Under this offer, the indirect-cost allowance is six thousand. The grant would therefore be sixty-six thousand, leaving a three-thousand difference against your full cost.

full-cost recovery

Full-cost recovery means obtaining funding for the direct and appropriately allocated support costs of the work; funding only the direct lines does not achieve it here.

Adele: We would provide the allocation, delivery implications, and the alternatives. We should also distinguish full-cost recovery from merely showing a grant budget that fits your form.

allocation basis

The allocation basis is the documented method assigning a share of common support to this project; it should reflect the actual method, not a label chosen merely to fit a cap.

Hugo: Then the allocation basis is important. Please show how you assigned the share, rather than moving the difference into a direct-cost line without a proper basis.

funding gap

The funding gap is 69,000 full cost minus 66,000 offered funding, or 3,000; no other source has been approved in the supplied facts.

Hugo: I understand. Describe the funding gap explicitly in the proposal. Do not show a balanced funding plan by assuming unrestricted money that your organization has not approved.

co-funding

Co-funding is a contribution from another permitted source alongside this grant; here it is only an option and must not be described as secured before authorization.

Hugo: That would make the co-funding visible. Confirm the source's availability and permission before adding it to the committed financing plan.

Read the phrases aloud. Then complete the conversation on the following pages using the word bank.

Conversation

The grant budget must cover the work

Fictional private-foundation proposal: direct staff costs \$48,000 and materials \$12,000. A documented allocation assigns \$9,000 of shared support costs to the project, with no duplication. The funder will cover all \$60,000 direct costs plus indirect costs limited to 10% of that direct-cost base. No other funding is approved. These are invented private-award terms, not a federal indirect-cost rule.

Complete the numbered gaps. Use each bank entry once; some entries contain several words.

WORD AND PHRASE BANK

allocation basis / full-cost recovery / funding gap / indirect-cost allowance / co-funding / direct costs

- 01 **Adele:** Thank you for reviewing the revised budget. We have sixty thousand in direct delivery costs, but the full cost of doing the work is sixty-nine thousand.
- 02 **Hugo:** Our offer covers the ¹ _____ and a ten-percent indirect allowance. I need to understand how your nine-thousand support allocation relates to that limit.
- 03 **Adele:** It covers this project's documented share of finance, systems, and other shared support. Those amounts are not already charged in the staff or materials lines.
- 04 **Hugo:** Then the ² _____ is important. Please show how you assigned the share, rather than moving the difference into a direct-cost line without a proper basis.
- 05 **Adele:** We can show that. Nine thousand on a sixty-thousand direct base is fifteen percent, but our budget starts from the actual allocation, not an assumed universal rate.
- 06 **Hugo:** Under this offer, the ³ _____ is six thousand. The grant would therefore be sixty-six thousand, leaving a three-thousand difference against your full cost.

Conversation / continued

- 07 **Adele:** That is the issue I need us to resolve before agreement. The program cannot function without those services simply because the funding line is capped.
- 08 **Hugo:** I understand. Describe the ⁴ _____ explicitly in the proposal. Do not show a balanced funding plan by assuming unrestricted money that your organization has not approved.
- 09 **Adele:** Could we seek an exception to your limit, or revise the scope and recast the project? Either route needs an actual decision, not a hidden subsidy.
- 10 **Hugo:** You can submit the exception request through our process. I cannot approve it in this conversation, but I can explain what information the decision-maker needs.

Conversation continues on the next page.

The grant budget must cover the work

CONVERSATION / CONTINUED

- 11 **Adele:** We would provide the allocation, delivery implications, and the alternatives. We should also distinguish ⁵ _____ from merely showing a grant budget that fits your form.
- 12 **Hugo:** Agreed. A compliant application form and a financially viable project are different tests. The request needs to show why the costs are necessary and how the proposed work depends on them.
- 13 **Adele:** If our board considers using unrestricted funds, we will describe that as a deliberate contribution. We will not call it free delivery or leave it outside the decision paper.
- 14 **Hugo:** That would make the ⁶ _____ visible. Confirm the source's availability and permission before adding it to the committed financing plan.
- 15 **Adele:** And if we reduce the number of sessions, we need a new cost calculation. Shared costs may not fall in the same proportion as the sessions.
- 16 **Hugo:** Exactly. A smaller output target does not automatically remove the full three-thousand gap. Show the revised resources and service consequences rather than applying a blanket reduction.
- 17 **Adele:** For now I will submit the sixty-nine-thousand full-cost budget and identify your sixty-six-thousand offer separately, with the gap unresolved.
- 18 **Hugo:** Please include the exception request and its evidence alongside that comparison. I will route it without representing a review request as an approved award change.
- 19 **Adele:** That gives both organizations a decision they can actually make. We can discuss the trade-off without implying that necessary support costs are waste.
- 20 **Hugo:** Yes. Keep the rate, base, allocation, grant offer, and remaining gap visible. Once a route is approved, the agreement and delivery plan should reflect the same funded scope.

CHECK THE GAPS

1. direct costs / 2. allocation basis / 3. indirect-cost allowance / 4. funding gap / 5. full-cost recovery / 6. co-funding

[Why these answers fit, page 172](#)

Use the specified direct-cost base

A fictional private award covers \$40,000 direct costs plus indirect costs capped at 12.5% of that base. The documented shared-cost allocation is \$7,000. No other funding is secured.

Complete the exchange using each phrase once. Read both roles, then switch roles and repeat with the bank covered.

WORD AND PHRASE BANK

45 / 47 / 5 / 2

- 01 **Director:** The indirect-cost allowance is \$¹ _____ thousand.
- 02 **Officer:** The offered grant totals \$² _____ thousand.
- 03 **Director:** The project's full cost is \$³ _____ thousand.
- 04 **Officer:** The unfunded difference is \$⁴ _____ thousand.

CHECK THE GAPS

1. 5 / 2. 45 / 3. 47 / 4. 2

[Why these answers fit, page 172](#)

Keep the distinction audible

Negotiate a project budget using an explicit cost base, a realistic shared-cost allocation, and a visible funding gap.

Language for the next case

Respect the agreed use of a story

consent record

The consent record specifies the participant's agreed use and exclusions; it covers a first-name-only written report story and expressly excludes the campaign's portrait and advertising use.

Eva: Yes. I will pause the campaign draft now. Your consent record covers the written report with your first name only. It does not cover the portrait or paid campaign.

publication hold

A publication hold stops the draft from being released while the misuse is corrected; it is an immediate control, not a promise that an already published item has been recalled.

Eva: Understood. The publication hold applies to the campaign material using your story or image. I will also check whether it is queued anywhere else.

anonymization

Anonymization concerns whether a person can be identified; removing a surname while retaining a recognizable portrait does not make Rina anonymous or authorize the excluded use.

Eva: No. That is not anonymization. You would still be identifiable, and it would not change your decision against using the photograph in this campaign.

scope of permission

The scope of permission identifies exactly which material, identity details, audience, and channel are agreed; keeping one permitted use does not authorize the excluded uses.

Eva: It will not affect your services under our policy. The scope of permission stays limited to what you agreed. We will not treat agreement to the report as approval for every other channel.

informed choice

Informed choice means deciding with an understanding of the proposed use and the ability to decline it; here Rina accepts a specific report use while refusing different campaign uses.

Eva: I will record that distinction. Your informed choice includes saying yes to one use and no to another. We should not force those into a single all-or-nothing answer.

withdrawal process

The withdrawal process records and acts on a change of permission under applicable policy and law; it must distinguish stopping controllable future uses from recalling copies already distributed.

Eva: We would explain the withdrawal process and what can actually be stopped or removed. I would not promise to retrieve every distributed print copy or third-party screenshot.

Read the phrases aloud. Then complete the conversation on the following pages using the word bank.

Conversation

Respect the agreed use of a story

Fictional adult participant Rina permits a first-name-only written story in a printed annual report, excluding photos, paid ads, and social posts. An unpublished campaign draft wrongly includes her portrait and quote. She still accepts the report use but rejects the campaign. Policy protects these choices without affecting services and requires use controls and documented follow-up.

Complete the numbered gaps. Use each bank entry once; some entries contain several words.

WORD AND PHRASE BANK

anonymization / scope of permission / informed choice / consent record / publication hold
/ withdrawal process

- 01 **Rina:** I saw the draft campaign and recognized my photograph. I agreed to the written annual-report story, not an advertisement. Can you stop this before it goes out?
- 02 **Eva:** Yes. I will pause the campaign draft now. Your ¹ _____ covers the written report with your first name only. It does not cover the portrait or paid campaign.
- 03 **Rina:** I am still happy with the report story we discussed. I do not want my face used in fundraising, and I do not want that choice to affect my support.
- 04 **Eva:** It will not affect your services under our policy. The ² _____ stays limited to what you agreed. We will not treat agreement to the report as approval for every other channel.
- 05 **Rina:** Please make sure the team knows this is not a request to change the wording around my picture. I do not want the picture used in that campaign at all.
- 06 **Eva:** Understood. The ³ _____ applies to the campaign material using your story or image. I will also check whether it is queued anywhere else.

Conversation / continued

- 07 **Rina:** Thank you. I would like the record to say I still accept the first-name-only written report version. Otherwise another colleague may remove that and miss my actual concern.
- 08 **Eva:** I will record that distinction. Your ⁴ _____ includes saying yes to one use and no to another. We should not force those into a single all-or-nothing answer.
- 09 **Rina:** Would removing my surname from the advertisement solve it? Someone suggested that, but my photograph would still be recognizable.
- 10 **Eva:** No. That is not ⁵ _____. You would still be identifiable, and it would not change your decision against using the photograph in this campaign.

Conversation continues on the next page.

Respect the agreed use of a story

CONVERSATION / CONTINUED

- 11 **Rina:** I also do not want to be asked again by several different people until I agree. I have made the choice clearly.
- 12 **Eva:** I understand. I will update the permitted-use information for the relevant team and handle the follow-up through one contact. Your decision does not need to be negotiated away.
- 13 **Rina:** What happens if I later want the written story withdrawn too? I know printed reports cannot always be pulled back from everyone who has received one.
- 14 **Eva:** We would explain the ⁶ _____ and what can actually be stopped or removed. I would not promise to retrieve every distributed print copy or third-party screenshot.
- 15 **Rina:** That is clearer. Today my request is about the unpublished campaign, so please confirm the action on that separately from the report permission.
- 16 **Eva:** I will confirm which draft and queued placements were stopped and what checks remain. I will not say everything has been erased while those checks are unfinished.
- 17 **Rina:** Will you need me to repeat the whole program experience to another team? I would rather not go through the personal details again.
- 18 **Eva:** No additional story details are needed for this correction. We will share the necessary use restrictions through the approved internal route, not circulate your account more widely.
- 19 **Rina:** Please send the confirmation to the contact address already agreed. It should say no portrait, no paid advertisement, and no social post, while retaining the specified report use.
- 20 **Eva:** I will do that and keep the correction traceable. Thank you for pointing it out; making the draft was our error, and receiving services did not authorize that extra publicity.

CHECK THE GAPS

1. consent record / 2. scope of permission / 3. publication hold / 4. informed choice / 5. anonymization / 6. withdrawal process

[Why these answers fit, page 174](#)

Respect a narrower publication choice

Participant Leo permits a first-name-only written quote in a member newsletter, but no photograph or social post. A queued social post contains his recognizable portrait. Under the fictional policy, declining publicity does not affect services.

Complete the exchange using each phrase once. Read both roles, then switch roles and repeat with the bank covered.

WORD AND PHRASE BANK

quote / services / newsletter / stopped

- 01 **Officer:** The permitted publication is the member ¹ _____.
- 02 **Leo:** The permitted material is a written ² _____.
- 03 **Officer:** The queued social post must be ³ _____.
- 04 **Leo:** Declining this publicity does not affect my ⁴ _____.

CHECK THE GAPS

1. newsletter / 2. quote / 3. stopped / 4. services

[Why these answers fit, page 174](#)

Keep the distinction audible

Clarify a participant's publication choices, stop an unapproved use, and confirm the limits of withdrawal honestly.

01 / Answers and explanations

A / Read the situation

A1. What do the checked records establish?

B. 200 distinct people participated this quarter.

The records substantiate distinct participation, not the unmeasured learning or employment results.

[Return to the exercise, page 4](#)

A2. What has not been measured?

C. Post-workshop employment and its duration

The brief states that employment after the workshops and its durability have not been measured.

[Return to the exercise, page 4](#)

A3. What should happen to the donor claim?

A. Retain participation and remove the unsupported lasting-employment conclusion.

The accurate revision keeps the supported participation result while withdrawing the stronger unmeasured claim.

[Return to the exercise, page 4](#)

D / Response choices

D1. Which donor sentence is supported?

C. Two hundred distinct people attended this quarter; lasting employment outcomes have not yet been measured.

The supported sentence preserves the verified reach and explicitly identifies the unmeasured endpoint.

[Return to the exercise, page 8](#)

D2. What does the proposed pathway do?

B. Explains how workshops might lead to skills, applications, and sustained employment.

A pathway explains the expected mechanism and assumptions, not the actual completion of every step.

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01 / Answers and explanations / continued

D3. A colleague needs the term for this meaning: A sequence linking resources, actions, and intended results. Which term fits?

A. results chain

A Correct. results chain: A sequence linking resources, actions, and intended results. The usual combination is "map the results chain".

B Not here. baseline: A reference measurement taken before or at the start of a comparison. The usual combination is "establish a baseline".

C Not here. reach: The extent of contact or participation within a defined population. The usual combination is "document program reach".

D Not here. impact: A broader or longer-term effect, with its meaning defined for the evaluation. The usual combination is "define the intended impact".

[Return to the exercise, page 8](#)

D4. Rebuild the exchange from "Attendance is an achievement, not a lasting outcome". Nina: "Our idea is that better application skills lead to better applications and eventually to employment that lasts." Joel: [missing response] Nina: "Then we should show the steps between the workshop and the longer-term aim rather than jump straight from attendance to jobs." Which response belongs in the gap?

C. That is a theory of change. It makes the expected route understandable, but it does not prove that every link has occurred because people attended a session.

A Not here. This line belongs to turn 18, after Nina says: "I will keep the two-hundred-person figure and explain the proposed skills-to-employment pathway separately, with the assumptions visible." It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 4, after Nina says: "The team will ask why we are taking the success out of the update. We need to explain the correction without losing credit for the work they actually delivered." It addresses that point, not the missing turn in the supplied exchange.

C Correct. This is Joel's response in turn 6. It connects Nina's preceding point with Nina's follow-up. Theory of change explains the expected route to a result, including assumptions that still need evidence.

D Not here. This line belongs to turn 8, after Nina says: "Then we should show the steps between the workshop and the longer-term aim rather than jump straight from attendance to jobs." It addresses that point, not the missing turn in the supplied exchange.

[Return to the exercise, page 8](#)

E / Conversation

1. reach

Turn 2. Reach describes the verified extent of participation; the checked count does not establish later employment or its duration.

01 / Answers and explanations / continued

2. activity

Turn 4. Activity is the work delivered, such as the workshops, which remains valuable to describe without claiming an unmeasured effect.

3. theory of change

Turn 6. Theory of change explains the expected route to a result, including assumptions that still need evidence.

4. results chain

Turn 8. Results chain lays out the connected steps between resources, activities, and intended results rather than skipping intermediate changes.

5. enabling condition

Turn 10. Enabling condition is a circumstance that helps the proposed pathway work; workshop attendance does not establish its presence.

6. sustained employment

Turn 12. Sustained employment needs a specified duration and employment measure, not an undefined claim that a job lasts.

7. follow-up

Turn 14. Follow-up collects information after the activity under an appropriate process, addressing later results absent from registration records.

8. outcome

Turn 16. Outcome is the change sought for participants; here later employment has not yet been measured and must remain an intended result.

9. learning question

Turn 18. Learning question directs the next evidence task, such as whether participants use the skills, without presuming the answer.

10. mission

Turn 20. Mission describes the organization's purpose and intended contribution, not a finding established by one quarter of participation records.

[Return to the conversation, page 10](#)

01 / Answers and explanations / continued

F / Accuracy and scope

F1. Which question makes sustained employment more measurable?

A. What period and employment definition will the indicator use?

Duration and the employment definition specify this endpoint; capacity, repeat attendance, and satisfaction measure different things.

[Return to the exercise, page 13](#)

F2. Which factor is an enabling condition rather than a verified workshop result?

B. Availability of relevant job opportunities

Job availability may help the pathway work, but the attendance record does not establish it as an outcome.

[Return to the exercise, page 13](#)

F / Guided speaking

1. 90

Lead: The verified number of distinct participants is 90.

Turn 1. Ninety distinct participants is the count explicitly supported by the project record.

2. April

Officer: The measurement period is April.

Turn 2. April defines the period covered by this participation figure.

3. study habits

Lead: The proposed intermediate change is study habits.

Turn 3. The stated pathway links mentoring to study habits before the intended course-completion result.

4. not been measured

Officer: Later qualifications have not been measured.

Turn 4. No qualification follow-up exists, so participation cannot be presented as proof of that outcome.

[Return to the conversation, page 14](#)

01 / Answers and explanations / continued

F / Rebuild the exchange

1. Rebuild the exchange from "Attendance is an achievement, not a lasting outcome". Nina: "We could plan a later check, but we should be clear about why we need the information and how it will be handled." Joel: [missing response] Nina: "What should the current update say while that work is still being designed?" Which response belongs in the gap?

A. A proportionate follow-up can address that gap. Define the purpose, measure, timing, and appropriate participation and information-handling arrangements before collecting extra personal details.

A Correct. This is Joel's response in turn 14. It connects Nina's preceding point with Nina's follow-up. Follow-up collects information after the activity under an appropriate process, addressing later results absent from registration records.

B Not here. This line belongs to turn 4, after Nina says: "The team will ask why we are taking the success out of the update. We need to explain the correction without losing credit for the work they actually delivered." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 12, after Nina says: "We also use lasting and sustained as if they have an obvious meaning. We have not agreed a period." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 6, after Nina says: "Our idea is that better application skills lead to better applications and eventually to employment that lasts." It addresses that point, not the missing turn in the supplied exchange.

[Return to the exercise, page 14](#)

02 / Answers and explanations

A / Read the situation

A1. What activity does N14 currently fund?

C. After-school reading sessions and approved reading materials

The signed agreement limits this award to the stated reading activities and materials.

[Return to the exercise, page 15](#)

A2. What does the proposed \$3,000 transfer require?

B. A written amendment signed by authorized representatives before commitment

The agreement expressly requires the authorized written amendment before committing to another activity.

[Return to the exercise, page 15](#)

A3. What has the donor contact actually done?

B. Called the idea worthwhile without approving an amendment

Informal encouragement is recorded, but the specified amendment and its authorization are absent.

[Return to the exercise, page 15](#)

D / Response choices

D1. Which statement about the balance is accurate?

A. The \$6,000 remains subject to N14's terms.

The existence and size of the unused balance do not remove the agreement's restrictions.

[Return to the exercise, page 19](#)

D2. What should the variation request include?

B. Amount, purpose, timing, and effects on agreed deliverables

A specific proposal gives the authorized parties the information needed to assess the actual change.

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02 / Answers and explanations / continued

D3. A colleague needs the term for this meaning: Spending allowed under the relevant terms. Which term fits?

D. permitted expenditure

A Not here. delegated authority: Decision power assigned to a person or role within defined limits. The usual combination is "verify delegated authority".

B Not here. funding rationale: The explanation supporting a request for financial support. The usual combination is "clarify the funding rationale".

C Not here. variation request: A request to change an agreed scope, budget, or condition. The usual combination is "submit a variation request".

D Correct. permitted expenditure: Spending allowed under the relevant terms. The usual combination is "verify permitted expenditure".

[Return to the exercise, page 19](#)

D4. Rebuild the exchange from "Mission fit does not change the grant agreement". Amir: "What does the agreement actually require if we want to move part of the remaining balance?" Leah: [missing response] Amir: "I had thought an unspent amount was easier to move because it had not yet been used for the reading sessions." Which response belongs in the gap?

B. A written amendment signed by the authorized representatives before commitment to a different activity. We do not have that amendment, so the proposed transfer is not approved.

A Not here. This line belongs to turn 14, after Amir says: "Can the contact who encouraged the idea sign the amendment, or does it need someone else?" It addresses that point, not the missing turn in the supplied exchange.

B Correct. This is Leah's response in turn 6. It connects Amir's preceding point with Amir's follow-up. The agreement requires this signed formal change before commitment to the different activity.

C Not here. This line belongs to turn 12, after Amir says: "We would need to explain whether fewer reading sessions or fewer materials would result. I should not leave the original promise untouched on paper." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 8, after Amir says: "I had thought an unspent amount was easier to move because it had not yet been used for the reading sessions." It addresses that point, not the missing turn in the supplied exchange.

[Return to the exercise, page 19](#)

E / Conversation

1. purpose restriction

Turn 2. The restriction limits N14 to reading work; mission fit alone does not permit food outreach.

02 / Answers and explanations / continued

2. mission alignment

Turn 4. Mission alignment concerns organizational purpose, not permission to redirect this restricted award.

3. written amendment

Turn 6. The agreement requires this signed formal change before commitment to the different activity.

4. unspent balance

Turn 8. The unused money retains its grant restrictions; remaining unspent does not make it general-purpose funding.

5. variation request

Turn 10. The request seeks an authorized change; submitting it does not itself approve the transfer.

6. deliverable

Turn 12. A deliverable is an agreed output; the proposed transfer must explain effects on the reading-program promises.

7. authorized representative

Turn 14. The representative needs the relevant signing power; a familiar donor contact may not hold it.

8. commitment

Turn 16. A deposit may obligate resources, so the required amendment must precede that commitment.

9. permitted expenditure

Turn 18. Another funding source has its own terms, which also need checking before use.

10. approval record

Turn 20. The record documents the authorized terms, distinguishing an executed amendment from encouragement or a pending request.

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02 / Answers and explanations / continued

F / Accuracy and scope

F1. Which message overstates the donor contact's response?

A. The donor approved the amendment by calling the idea worthwhile.

A favorable informal comment does not satisfy the agreement's specified signed-amendment requirement.

[Return to the exercise, page 24](#)

F2. What is the supported spending status?

C. Do not commit the transfer until the required amendment is executed.

The fictional agreement requires the authorized amendment before commitment to a different activity.

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F / Guided speaking

1. adult-literacy classes

Manager: The existing funded activity is adult-literacy classes.

Turn 1. The award's current purpose is adult literacy, not the proposed transport activity.

2. \$8,000

Officer: The unspent balance is \$8,000.

Turn 2. Eight thousand dollars remains unused but still subject to the award's terms.

3. \$2,000

Manager: The proposed transfer is \$2,000.

Turn 3. Two thousand dollars is the amount requested for the different activity.

4. written amendment

Officer: The required approval document is a written amendment.

Turn 4. The stated terms require this document before commitment, and no signed amendment exists.

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02 / Answers and explanations / continued

F / Rebuild the exchange

1. Rebuild the exchange from "Mission fit does not change the grant agreement".

Amir: "Can the contact who encouraged the idea sign the amendment, or does it need someone else?" **Leah:** [missing response] **Amir:** "They are asking for a deposit today to hold the supplies. I have not agreed. Does a small reservation payment still count as committing the grant?" Which response belongs in the gap?

C. We must verify the authorized representative for each organization. A familiar contact may help route the request without holding the signing authority needed to approve it.

A Not here. This line belongs to turn 8, after Amir says: "I had thought an unspent amount was easier to move because it had not yet been used for the reading sessions." It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 12, after Amir says: "We would need to explain whether fewer reading sessions or fewer materials would result. I should not leave the original promise untouched on paper." It addresses that point, not the missing turn in the supplied exchange.

C Correct. This is Leah's response in turn 14. It connects Amir's preceding point with Amir's follow-up. The representative needs the relevant signing power; a familiar donor contact may not hold it.

D Not here. This line belongs to turn 6, after Amir says: "What does the agreement actually require if we want to move part of the remaining balance?" It addresses that point, not the missing turn in the supplied exchange.

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03 / Answers and explanations

A / Read the situation

A1. Which group has the paired score result?

D. Sixty people who completed both tests

Sixty participants supplied both initial and final scores, allowing the paired comparison.

[Return to the exercise, page 28](#)

A2. What is the observed mean-score change?

D. An increase of 18 points, from 40 to 58

Subtracting forty from fifty-eight gives an eighteen-point increase on the stated knowledge test.

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A3. What is not established?

A. A causal effect on household finances

The study measures knowledge scores and does not establish either program causation or household financial improvement.

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D / Response choices

D1. Which finding is accurate?

D. The mean score among 60 paired completers rose from 40 to 58.

The accurate statement keeps the observed scores and analyzed group without inventing causation or missing outcomes.

[Return to the exercise, page 32](#)

D2. What proportion lacks a paired result?

C. 20% of enrollees

Fifteen divided by seventy-five equals one fifth, or twenty percent.

[Return to the exercise, page 32](#)

03 / Answers and explanations / continued

D3. A colleague needs the term for this meaning: A set of priority questions guiding inquiry and adaptation. Which term fits?

C. learning agenda

A Not here. practice effect: Improvement from familiarity with a test rather than the intended learning alone. The usual combination is "examine practice effects".

B Not here. score point: One unit on a specified scoring scale. The usual combination is "report a score-point change".

C Correct. learning agenda: A set of priority questions guiding inquiry and adaptation. The usual combination is "define the learning agenda".

D Not here. validity: How well a measure or inference supports its intended interpretation. The usual combination is "assess validity".

[Return to the exercise, page 32](#)

D4. Rebuild the exchange from "The scores improved, but the cause is not isolated".

Dan: "The chart labels the change eighteen percent. Because the scale is out of a hundred, I can see how that happened, but I would rather name the actual units."

Priya: [missing response] **Dan:** "The missing fifteen are a fifth of enrollment. We need to know why their paired results are absent." Which response belongs in the gap?

A. Use eighteen score points. That is the direct subtraction of forty from fifty-eight on this scale. If we add a relative percentage, it needs its own clear baseline and explanation.

A Correct. This is Priya's response in turn 6. It connects Dan's preceding point with Dan's follow-up. Score points identifies the units on the test scale, avoiding confusion with a relative percentage change or another outcome.

B Not here. This line belongs to turn 14, after Dan says: "I want to avoid presenting the data as useless simply because the design cannot answer every question." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 12, after Dan says: "There was no other group taking the test without the program. Does that limit what we can say about the cause?" It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 4, after Dan says: "Then the eighteen-point improvement belongs to those sixty people as a group, not automatically to everyone who enrolled." It addresses that point, not the missing turn in the supplied exchange.

[Return to the exercise, page 32](#)

E / Conversation

1. paired observations

Turn 2. Paired observations compare the same participants at both times; only sixty enrollees supplied that complete measurement pair.

03 / Answers and explanations / continued

2. mean score

Turn 4. Mean score is the arithmetic average for the defined group; its change does not establish that every individual improved equally.

3. score points

Turn 6. Score points identifies the units on the test scale, avoiding confusion with a relative percentage change or another outcome.

4. missing data

Turn 8. Missing data covers the absent paired results; the reasons and possible effects on interpretation remain unknown.

5. practice effect

Turn 10. Practice effect is improvement associated with test familiarity; it is a possible influence here, not an established explanation for the whole gain.

6. comparison group

Turn 12. Comparison group can help examine what might happen without the same intervention; none is available in this design.

7. causal attribution

Turn 14. Causal attribution assigns the change to the program; the available before-and-after observations do not isolate that effect.

8. behavioral outcome

Turn 16. Behavioral outcome measures what people do; the knowledge test does not directly establish changes in household financial behavior.

9. learning agenda

Turn 18. Learning agenda organizes the next questions, including missingness, measurement quality, and plausible alternative explanations.

10. adaptive management

Turn 20. Adaptive management uses evidence and acknowledged limits to improve decisions, without requiring exaggerated claims of proven success.

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03 / Answers and explanations / continued

F / Accuracy and scope

F1. How should practice effects be described?

C. A possible influence that has not yet been examined

Reusing the same test makes familiarity a relevant possibility, but no analysis has established its contribution.

[Return to the exercise, page 37](#)

F2. Which next conclusion is justified?

B. Investigate missing results and alternative explanations while retaining the bounded finding.

The evidence supports a precise observation and further inquiry, not an all-or-nothing judgment about success.

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F / Guided speaking

1. 40 people

Manager: The paired-completer group contains 40 people.

Turn 1. Forty participants have both measurements and therefore belong in the paired comparison.

2. 12 points

Analyst: The observed mean-score gain is 12 points.

Turn 2. Sixty-seven minus fifty-five equals twelve points on the stated test scale.

3. 10 people

Manager: The number lacking paired data is 10 people.

Turn 3. Ten of the fifty enrollees do not have the complete before-and-after result.

4. 20%

Analyst: The proportion lacking paired data is 20%.

Turn 4. Ten divided by fifty equals twenty percent, which limits the completeness of the paired analysis.

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03 / Answers and explanations / continued

F / Rebuild the exchange

1. Rebuild the exchange from "The scores improved, but the cause is not isolated".

Dan: "I want to avoid presenting the data as useless simply because the design cannot answer every question." Priya: [missing response] Dan: "And higher knowledge scores do not necessarily mean people changed how they manage household money." Which response belongs in the gap?

A. We can report the improvement while limiting causal attribution. A bounded observation is useful. It is not the same as proving that the program caused all of the gain.

A Correct. This is Priya's response in turn 14. It connects Dan's preceding point with Dan's follow-up. Causal attribution assigns the change to the program; the available before-and-after observations do not isolate that effect.

B Not here. This line belongs to turn 4, after Dan says: "Then the eighteen-point improvement belongs to those sixty people as a group, not automatically to everyone who enrolled." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 18, after Dan says: "We could examine missingness, review the test, and compare the findings with other appropriate evidence before redesigning the sessions." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 12, after Dan says: "There was no other group taking the test without the program. Does that limit what we can say about the cause?" It addresses that point, not the missing turn in the supplied exchange.

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04 / Answers and explanations

A / Read the situation

A1. Who has confirmed availability on 12 October?

B. The partner's team only

The partner has confirmed its own availability, while community and transport arrangements remain unresolved.

[Return to the exercise, page 39](#)

A2. What remains booked for 10 October?

B. Transport

The brief explicitly states that the transport booking still uses the original date.

[Return to the exercise, page 39](#)

A3. What may Ben and Nadia approve independently?

D. Neither may approve additional spending.

The stated authority limit requires additional spending to follow the relevant approval route.

[Return to the exercise, page 39](#)

D / Response choices

D1. Which status message is accurate?

D. The partner is available on 12 October; community confirmation and transport checks are pending.

The accurate message distinguishes the one confirmed availability from the two outstanding coordination tasks.

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D2. Which question should Nadia ask?

A. Does 12 October work for the community, including relevant access arrangements?

Nadia needs an explicit availability discussion, not an assumption based on silence or an unreceived proposal.

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04 / Answers and explanations / continued

D3. A colleague needs the term for this meaning: Whether a person or resource can be used at a specified time. Which term fits?

B. availability

A Not here. rescheduling: Moving an activity to another time or date. The usual combination is "coordinate rescheduling".

B Correct. availability: Whether a person or resource can be used at a specified time. The usual combination is "confirm availability".

C Not here. notification: A message informing someone of an event or change. The usual combination is "send a notification".

D Not here. contingency: An alternative arrangement for a possible difficulty. The usual combination is "agree a contingency".

[Return to the exercise, page 43](#)

D4. Rebuild the exchange from "A partner changes the visit, but the community has not agreed". Nadia: "I will contact the community focal point now. I do not want an email delivery receipt to become our evidence that everyone agreed." Ben: [missing response] Nadia: "Has anyone actually changed the transport booking? I can see the new calendar invitation, but that does not tell me what the provider has reserved." Which response belongs in the gap?

C. An acknowledgment is useful, but it is not the same as acceptance. Record the actual response and any conditions rather than simply marking the communication complete.

A Not here. This line belongs to turn 4, after Nadia says: "Exactly. Some people may have already rearranged their work for the original visit. I need to ask whether the change is workable." It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 16, after Nadia says: "Should we cancel the original transport now so that we do not forget it later?" It addresses that point, not the missing turn in the supplied exchange.

C Correct. This is Ben's response in turn 6. It connects Nadia's preceding point with Nadia's follow-up. Acknowledgment confirms receipt of a message, not acceptance of the date or completion of the coordination process.

D Not here. This line belongs to turn 8, after Nadia says: "Has anyone actually changed the transport booking? I can see the new calendar invitation, but that does not tell me what the provider has reserved." It addresses that point, not the missing turn in the supplied exchange.

[Return to the exercise, page 43](#)

E / Conversation

1. proposed date

Turn 2. Proposed date distinguishes the suggested change from a visit confirmed through all the required coordination steps.

04 / Answers and explanations / continued

2. access requirements

Turn 4. Access requirements identify practical participation needs that a revised date or arrangement may affect.

3. acknowledgment

Turn 6. Acknowledgment confirms receipt of a message, not acceptance of the date or completion of the coordination process.

4. transport booking

Turn 8. Transport booking remains a separate arrangement for 10 October; the partner's calendar change does not amend it automatically.

5. change fee

Turn 10. Change fee is a possible cost of altering the reservation; it needs verification and the relevant spending approval.

6. action owner

Turn 12. Action owner names the person responsible for the transport check, making the next step traceable rather than leaving it to everyone.

7. coordination log

Turn 14. Coordination log records the current status, responsible people, and outstanding arrangements so teams work from the same information.

8. go-ahead

Turn 16. Go-ahead is the required authorization to proceed; cancellation should not get ahead of the decision and its dependencies.

9. itinerary

Turn 18. Itinerary sets out the agreed visit details; it should reflect the recorded decision rather than a provisional calendar change.

10. dependency

Turn 20. Dependency identifies an outstanding condition, such as community agreement or transport, on which the revised visit relies.

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04 / Answers and explanations / continued

F / Accuracy and scope

F1. What should Ben report by 15:00?

D. Transport availability, change terms, and any cost requiring approval

Ben owns the transport check and should report its findings within his stated authority.

[Return to the exercise, page 47](#)

F2. Which action closes coordination properly?

A. Record the go-ahead and circulate consistent confirmed details to all relevant contacts.

A recorded decision and consistent notifications align the community, partner, and practical arrangements.

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F / Guided speaking

1. 20 November

Coordinator: The proposed new date is 20 November.

Turn 1. The twentieth is proposed by the partner, not yet confirmed through the full coordination process.

2. 18 November

Mei: The existing transport date is 18 November.

Turn 2. The transport booking remains on the original date until an authorized change is arranged.

3. community confirmation

Omar: My outstanding task is community confirmation.

Turn 3. Omar must establish whether the revised date works for the community rather than assume acceptance.

4. 14:00 local time

Mei: My transport update is due at 14:00 local time.

Turn 4. This is the stated deadline for the transport check, not a guarantee that the visit proceeds.

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04 / Answers and explanations / continued

F / Rebuild the exchange

1. Rebuild the exchange from "A partner changes the visit, but the community has not agreed". Nadia: "I will update the coordinator by sixteen hundred local time after contacting the community. If I have not received a response, I will say that clearly." Ben: [missing response] Nadia: "Should we cancel the original transport now so that we do not forget it later?" Which response belongs in the gap?

D. Good. Put those updates in the coordination log. The deadline is for an accurate status report, not a promise that the revised visit will definitely be approved by then.

A Not here. This line belongs to turn 10, after Nadia says: "There could be an extra charge. We should know that before telling the partner that the revised arrangements are settled." It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 12, after Nadia says: "When can you give the coordinator that information? The partner is waiting for a response, and we need a realistic next update." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 2, after Nadia says: "RiverLink's partner can move from the tenth to the twelfth. They have sent a revised calendar invite, but I have not checked that date with the community yet." It addresses that point, not the missing turn in the supplied exchange.

D Correct. This is Ben's response in turn 14. It connects Nadia's preceding point with Nadia's follow-up. Coordination log records the current status, responsible people, and outstanding arrangements so teams work from the same information.

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05 / Answers and explanations

A / Read the situation

A1. What did Elena directly witness?

D. She did not witness the reported interaction.

Elena is passing on a participant's account, not claiming to have seen the interaction herself.

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A2. Must Sam wait for proof before reporting?

B. No; the stated policy requires prompt reporting of concerns.

The fictional policy requires concerns to enter the designated route without waiting for proof.

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A3. What should Sam establish promptly?

B. Whether there is an immediate safety need requiring the emergency route

Immediate safety needs affect the response route, while investigation and publicity are outside this receiving task.

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D / Response choices

D1. Which response is appropriate?

C. Thank you; let us check immediate safety and use the designated route.

The appropriate response acknowledges the concern, addresses urgent safety, and follows the stated reporting process.

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D2. Which record preserves the source?

B. Elena reports that the participant described a threat; Elena did not witness it.

The accurate record attributes the account and separates it from direct observation or an established finding.

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05 / Answers and explanations / continued

D3. A colleague needs the term for this meaning: A reported claim not yet established through the relevant process. Which term fits?

C. allegation

A Not here. support referral: Connection to an appropriate source of assistance. The usual combination is "arrange a support referral".

B Not here. alternate contact: A specified substitute reporting contact under the policy. The usual combination is "use the alternate contact".

C Correct. allegation: A reported claim not yet established through the relevant process. The usual combination is "record an allegation".

D Not here. verbatim wording: The exact words used by a speaker. The usual combination is "preserve verbatim wording".

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D4. Rebuild the exchange from "Receive the concern without conducting your own investigation". Elena: "I was unsure whether I could report it because I only heard what the participant said. I cannot confirm what actually happened." Sam: [missing response] Elena: "I remember the phrase about losing support, but not the whole conversation word for word. Should I fill the gaps from what I think they meant?" Which response belongs in the gap?

D. Your reported account can still be passed on. State who told you what and make clear that you did not witness the interaction. Do not add certainty that you do not have.

A Not here. This line belongs to turn 16, after Elena says: "What happens if the usual safeguarding lead is unavailable, or if a concern involves that person?" It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 4, after Elena says: "I do not know. The participant did not explain whether the worker is with them now, and I do not want to guess." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 12, after Elena says: "I was going to ask the worker what happened so that I could give you both sides before making a report." It addresses that point, not the missing turn in the supplied exchange.

D Correct. This is Sam's response in turn 6. It connects Elena's preceding point with Elena's follow-up. Reported account attributes the information to what the participant told Elena, distinguishing it from Elena's own observation.

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E / Conversation

1. concern

Turn 2. Concern identifies information needing appropriate attention without requiring Elena to prove the allegation before reporting it.

05 / Answers and explanations / continued

2. immediate danger

Turn 4. Immediate danger requires the relevant emergency route without delay; uncertainty should not be converted into an unsupported assurance of safety.

3. reported account

Turn 6. Reported account attributes the information to what the participant told Elena, distinguishing it from Elena's own observation.

4. verbatim wording

Turn 8. Verbatim wording means exact remembered words; unclear or missing details must not be invented to make the account sound complete.

5. confidentiality

Turn 10. Confidentiality limits access under the relevant process but does not mean a concern can be withheld from everyone who must act.

6. investigation

Turn 12. Investigation belongs to the authorized process; Elena should not confront the worker or collect competing accounts before reporting.

7. secure channel

Turn 14. Secure channel is the designated protected reporting method, not a general chat where sensitive information would circulate unnecessarily.

8. alternate contact

Turn 16. Alternate contact provides the stated independent reporting route when the usual lead is implicated or unavailable.

9. reporting route

Turn 18. Reporting route describes the approved next step that can be explained now, without guaranteeing an investigative finding or sanction.

10. acknowledged receipt

Turn 20. Acknowledged receipt confirms that the designated recipient received the concern; it does not mean the allegation has been substantiated.

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05 / Answers and explanations / continued

F / Accuracy and scope

F1. What if the usual lead is implicated?

C. Use the independent alternate contact specified in the policy.

The named independent route avoids the conflict without delaying for a routine meeting or an unauthorized investigation.

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F2. Which promise should Sam avoid?

D. Complete secrecy and a guaranteed investigation outcome

Sam cannot guarantee either that nobody will need the information or what the authorized process will conclude.

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F / Guided speaking

1. reported account

Manager: Your information is a reported account, not a direct observation.

Turn 1. Hana describes information from the participant rather than an event she personally witnessed.

2. independent alternate contact

Hana: Because the usual lead is implicated, we use the independent alternate contact.

Turn 2. The stated policy provides this alternative for a concern involving the normal recipient.

3. secure reporting channel

Manager: We send necessary details through the secure reporting channel.

Turn 3. Sensitive information belongs in the designated channel rather than a general conversation.

4. emergency route

Hana: Immediate danger requires the relevant emergency route.

Turn 4. Urgent safety needs must not wait for an ordinary handover or a particular colleague.

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05 / Answers and explanations / continued

F / Rebuild the exchange

1. Rebuild the exchange from "Receive the concern without conducting your own investigation". Elena: "I can provide the information I have through the designated channel. I should not put the participant's account into the general volunteer chat." Sam: [missing response] Elena: "What happens if the usual safeguarding lead is unavailable, or if a concern involves that person?" Which response belongs in the gap?

C. Correct. I will use the approved secure channel promptly. The record will separate the participant's reported words, your own observations, and anything that remains unknown.

A Not here. This line belongs to turn 2, after Elena says: "I need to pass on something a participant told me. They said a worker threatened to withdraw support unless they did a private favor. I did not witness it myself." It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 8, after Elena says: "I remember the phrase about losing support, but not the whole conversation word for word. Should I fill the gaps from what I think they meant?" It addresses that point, not the missing turn in the supplied exchange.

C Correct. This is Sam's response in turn 14. It connects Elena's preceding point with Elena's follow-up. Secure channel is the designated protected reporting method, not a general chat where sensitive information would circulate unnecessarily.

D Not here. This line belongs to turn 10, after Elena says: "The participant seemed afraid of the worker finding out. Can I tell them that this will remain entirely between us?" It addresses that point, not the missing turn in the supplied exchange.

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06 / Answers and explanations

A / Read the situation

A1. Which duties are currently approved for Luis?

D. Packing and stock counting

The brief defines Luis's approved role as packing and stock counting only.

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A2. What does the fictional policy require for van use?

B. Current driver authorization

The policy restricts van use to currently authorized drivers, regardless of enthusiasm or schedule pressure.

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A3. What can Grace offer Luis now?

A. Continue approved duties and request assessment for a future driving role.

Grace can explain the development route while preserving the present authorization boundary.

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D / Response choices

D1. Which response respects both Luis and the policy?

D. Thank you; I will seek authorized cover while you continue the approved packing work.

The response acknowledges the offer and keeps both the delivery and Luis's work within the stated role limits.

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D2. What does finishing a training course establish by itself?

C. Completion of that course, not necessarily final authorization

Training completion records one learning step; it does not establish an assessment result, interim permission, or roster authorization.

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06 / Answers and explanations / continued

D3. A colleague needs the term for this meaning: The process of preparing someone to join an organization or role. Which term fits?

B. onboarding

A Not here. training completion: Finishing a specified training activity. The usual combination is "record training completion".

B Correct. onboarding: The process of preparing someone to join an organization or role. The usual combination is "improve volunteer onboarding".

C Not here. reasonable adjustment: An appropriate change considered under applicable needs, duties, and policy. The usual combination is "discuss reasonable adjustments".

D Not here. roster: A schedule assigning people to duties or shifts. The usual combination is "update the volunteer roster".

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D4. Rebuild the exchange from "An enthusiastic offer is not a driving authorization". Luis: "I see. I was trying to keep the delivery moving, not put you on the spot. What can I do now that will actually help?" Grace: [missing response] Luis: "Is there a list you can check, or does the decision depend on who happens to be coordinating the shift?" Which response belongs in the gap?

A. Your offer is helpful. Maintaining this role boundary is not a judgment about your intentions. We need to arrange the delivery through the appropriate person while keeping your approved work moving.

A Correct. This is Grace's response in turn 6. It connects Luis's preceding point with Luis's follow-up. The boundary limits permitted duties without judging the volunteer's intentions or willingness to help.

B Not here. This line belongs to turn 4, after Luis says: "I understand that it is outside my usual tasks, but I have plenty of ordinary driving experience. Is that not enough for a short trip?" It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 12, after Luis says: "I would like to help with driving in future. Could we make that part of my role instead of having this problem again?" It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 10, after Luis says: "Then who can arrange another driver? I can finish the packing while you find out." It addresses that point, not the missing turn in the supplied exchange.

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E / Conversation

1. scope of role

Turn 2. Luis is approved for packing and stock counting; driving is outside those current duties.

06 / Answers and explanations / continued

2. authorization

Turn 4. Authorization is current organizational permission; ordinary driving experience does not replace the required approval.

3. role boundary

Turn 6. The boundary limits permitted duties without judging the volunteer's intentions or willingness to help.

4. authorization register

Turn 8. The register establishes current permission rather than relying on an improvised judgment of confidence.

5. transport lead

Turn 10. The transport lead is responsible for arranging authorized cover; Luis cannot approve himself.

6. role expansion

Turn 12. Role expansion requests broader duties but requires the relevant assessment and approval before permission.

7. Training completion

Turn 14. Finishing training establishes course completion; separate assessment and authorization requirements may still remain.

8. competency assessment

Turn 16. The assessment checks demonstrated ability against task requirements, rather than merely recording training attendance.

9. task allocation

Turn 18. Task allocation keeps Luis working within his approved duties while transport cover is arranged.

10. roster

Turn 20. The roster should record confirmed authorized cover, not an offer from an unapproved driver.

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06 / Answers and explanations / continued

F / Accuracy and scope

F1. Who should Grace contact for replacement transport?

B. The transport lead

The brief assigns the authorized-cover route to the transport lead rather than the volunteer or an unrelated party.

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F2. Which future-role statement is accurate?

A. You may request assessment, but approval is not guaranteed.

A request starts the specified development process without determining its result.

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F / Guided speaking

1. reception duties

Coordinator: Your current approved work is reception duties.

Turn 1. The stated role permits reception work, not an unapproved independent home visit.

2. authorized cover

Maya: Today's replacement arrangement needs authorized cover.

Turn 2. The canceled visit must be addressed through appropriately authorized staff or volunteers.

3. role-assessment process

Coordinator: A future expanded role requires the role-assessment process.

Turn 3. A request for broader duties must follow the stated assessment route before permission is assumed.

4. guaranteed

Maya: Applying does not mean that approval is guaranteed.

Turn 4. The coordinator can explain the process but cannot promise its eventual outcome.

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06 / Answers and explanations / continued

F / Rebuild the exchange

1. Rebuild the exchange from "An enthusiastic offer is not a driving authorization".

Luis: "If I complete the training, would that mean I can start driving on the next shift?" **Grace:** [missing response] **Luis:** "So the assessment is about demonstrating the required ability, and the final authorization records permission to take on the duty." Which response belongs in the gap?

D. Not necessarily. Training completion is one step. We must also establish which assessment and approval requirements remain, rather than treating a course certificate as permission to undertake every task.

A Not here. This line belongs to turn 2, after Luis says: "We are short a driver, and the boxes are nearly ready. I have driven vans before. Could I cover this delivery, or do you need to check my role first?" It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 8, after Luis says: "Is there a list you can check, or does the decision depend on who happens to be coordinating the shift?" It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 18, after Luis says: "For today, I will stay with packing and stock counting. Please tell me if there is another task within my current role that would help." It addresses that point, not the missing turn in the supplied exchange.

D Correct. This is Grace's response in turn 14. It connects Luis's preceding point with Luis's follow-up. Finishing training establishes course completion; separate assessment and authorization requirements may still remain.

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07 / Answers and explanations

A / Read the situation

A1. Who answered the original survey?

A. Eighty self-selected adult respondents in the region

The source population is the stated self-selected adult respondent group, not local children.

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A2. What did 27 respondents report?

D. Concern about enough food during the previous month

The original question concerned respondents' past-month food concerns, not the headline's different population and time frame.

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A3. What does the organization's own policy allow?

A. Evidence-based policy advocacy without party endorsement

The fictional policy distinguishes advocacy about issues from endorsing political parties.

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D / Response choices

D1. Which statement accurately reflects the source?

A. In the 2018 regional survey, 27 of 80 self-selected adult respondents reported past-month food concerns.

The accurate statement preserves the source's date, respondents, quantity, and actual measured concern.

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D2. Does adding a citation rescue the original headline?

C. No; attribution does not correct its changed population and time frame.

A citation identifies a source but cannot make a claim faithful when its meaning has been altered.

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07 / Answers and explanations / continued

D3. A colleague needs the term for this meaning: Evidence supporting what a statement asserts. Which term fits?

C. claim substantiation

A Not here. representativeness: How well a sample reflects the relevant wider population. The usual combination is "assess representativeness".

B Not here. qualifier: Wording that specifies the limits or conditions of a statement. The usual combination is "add a material qualifier".

C Correct. claim substantiation: Evidence supporting what a statement asserts. The usual combination is "check claim substantiation".

D Not here. informed consent: Agreement based on relevant information about the proposed use or action. The usual combination is "obtain informed consent".

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D4. Rebuild the exchange from "An alarming headline changes the meaning of an old survey". Maya: "Can you read me the actual question? We have shortened this copy three times. I suspect we have shortened away something essential." Theo: [missing response] Maya: "And we cannot turn a finding from two thousand eighteen into a claim about tonight without current evidence." Which response belongs in the gap?

B. The question wording concerned whether respondents had worried about having enough food during the previous month. It did not establish that children were hungry on a particular night.

A Not here. This line belongs to turn 12, after Maya says: "So adding the source name would not rescue the original headline. It would still make a different claim from the underlying finding." It addresses that point, not the missing turn in the supplied exchange.

B Correct. This is Theo's response in turn 6. It connects Maya's preceding point with Maya's follow-up. Question wording concerned enough food during the previous month, which differs from a measure of children experiencing hunger tonight.

C Not here. This line belongs to turn 20, after Maya says: "I will remove the unsupported headline, keep a clear request, and send the revised wording through the publication process." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 4, after Maya says: "The number came from twenty-seven responses out of eighty. That is roughly one third, so is the calculation at least correct?" It addresses that point, not the missing turn in the supplied exchange.

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E / Conversation

1. source attribution

Turn 2. Source attribution identifies the original survey but does not, by itself, make a changed or exaggerated headline accurate.

07 / Answers and explanations / continued

2. denominator

Turn 4. Denominator is the eighty respondents used to calculate the proportion; it is not the number of local children or all regional adults.

3. question wording

Turn 6. Question wording concerned enough food during the previous month, which differs from a measure of children experiencing hunger tonight.

4. time frame

Turn 8. Time frame limits the finding to the earlier survey and its past-month reference, not a current condition tonight.

5. self-selection

Turn 10. Self-selection means people chose to respond; representativeness of the wider population has not been established from this sample.

6. extrapolation

Turn 12. Extrapolation extends the respondent finding to a different population or present condition without evidence supporting that extension.

7. call to action

Turn 14. Call to action asks for support clearly without needing an invented or misrepresented current prevalence statistic.

8. policy position

Turn 16. Policy position states a view on an issue; the organization's stated rule allows evidence-based advocacy distinct from party endorsement.

9. informed consent

Turn 18. Informed consent concerns the proposed use of the person's story; receiving support does not automatically authorize fundraising publication.

10. editorial approval

Turn 20. Editorial approval should cover the corrected headline and supporting text, ensuring both communicate the verified claim consistently.

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07 / Answers and explanations / continued

F / Accuracy and scope

F1. Which advocacy sentence fits the stated nonpartisan rule?

B. We support the proposed access reform on the evidence, without endorsing a party.

The fictional rule allows issue-based advocacy while withholding party endorsement.

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F2. What should accompany use of a participant story?

A. The relevant consent and dignity checks for its intended publication

Responsible publication requires the relevant consent and respectful representation, not automatic permission derived from service use.

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F / Guided speaking

1. 2020

Editor: The survey year is 2020.

Turn 1. The result is historical and cannot be relabeled as a current measurement.

2. 60 respondents

Analyst: The denominator is 60 respondents.

Turn 2. Sixty adult service users answered, not the entire city population.

3. 30%

Editor: The proportion reporting difficulties is 30%.

Turn 3. Eighteen divided by sixty equals thirty percent of these respondents.

4. previous month

Analyst: The question's reference period was the previous month.

Turn 4. The stated survey question concerned the preceding month, not conditions today.

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07 / Answers and explanations / continued

F / Rebuild the exchange

1. Rebuild the exchange from "An alarming headline changes the meaning of an old survey". Maya: "A fully qualified historical finding may be too cumbersome for the headline. I would rather remove it and explain the work clearly." Theo: [missing response] Maya: "The appeal also supports an access reform. A colleague thinks our nonpartisan rule means we cannot discuss any policy issue." Which response belongs in the gap?

C. We can retain a strong call to action. State the support being requested and the work it will fund, using verified facts. Urgency should come from the actual need, not a claim we cannot substantiate.

A Not here. This line belongs to turn 2, after Maya says: "Before this appeal goes out, I need the source behind one in three local children is hungry tonight. It is our lead claim, and I cannot trace it from the draft." It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 8, after Maya says: "And we cannot turn a finding from two thousand eighteen into a claim about tonight without current evidence." It addresses that point, not the missing turn in the supplied exchange.

C Correct. This is Theo's response in turn 14. It connects Maya's preceding point with Maya's follow-up. Call to action asks for support clearly without needing an invented or misrepresented current prevalence statistic.

D Not here. This line belongs to turn 10, after Maya says: "Do we know how the eighty people were selected? I do not want to imply that they represent every household in the region." It addresses that point, not the missing turn in the supplied exchange.

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08 / Answers and explanations

A / Read the situation

A1. How much is available for this operating shortfall?

C. \$60,000

The scenario excludes the restricted \$120,000 and identifies the remaining \$60,000 as available after other commitments.

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A2. How long until the stated reserve floor is reached?

B. Two months under the constant-outflow assumption

Sixty thousand less the twenty-thousand floor leaves forty thousand, covering two months at twenty thousand monthly outflow.

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A3. How should the proposed donation be treated?

B. As unconfirmed, without an assumed receipt date

Neither confirmation nor payment timing exists, so the proposal must not be treated as available cash.

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D / Response choices

D1. Which runway statement is accurate?

D. Three months to exhaustion and two months to the reserve floor under the stated assumption

The usable sixty thousand covers three monthly outflows, while only forty thousand can be used before reaching the floor.

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D2. Which presentation handles the proposed \$50,000 appropriately?

C. Show it as a separate unconfirmed scenario with uncertain timing.

Separate scenario reporting preserves uncertainty about both whether the support will arrive and when.

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08 / Answers and explanations / continued

D3. A colleague needs the term for this meaning: Resources usable for the stated purpose after relevant restrictions and commitments. Which term fits?

D. available funds

A Not here. net cash outflow: Cash paid out minus cash received over a specified period. The usual combination is "forecast net cash outflow".

B Not here. sensitivity analysis: Examination of how a result changes when assumptions change. The usual combination is "run a sensitivity analysis".

C Not here. service continuity: Ability to maintain the relevant service over time. The usual combination is "protect service continuity".

D Correct. available funds: Resources usable for the stated purpose after relevant restrictions and commitments. The usual combination is "identify available funds".

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D4. Rebuild the exchange from "Cash in the account is not all available for the shortfall". Peter: "The current projection assumes that the available balance falls by twenty thousand each month. Does that already allow for normal receipts?" Asha: [missing response] Peter: "Sixty divided by twenty gives three months. We should distinguish that from the board's twenty-thousand lower threshold." Which response belongs in the gap?

A. Yes, it is net cash outflow, not just gross spending. We are assuming it stays at twenty thousand a month. That assumption should remain visible wherever we show the forecast.

A Correct. This is Asha's response in turn 6. It connects Peter's preceding point with Peter's follow-up. Net cash outflow is payments less receipts over the period; the stated twenty-thousand monthly amount drives this simplified projection.

B Not here. This line belongs to turn 4, after Peter says: "Then what amount can we actually use, after accounting for the other obligations already identified?" It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 8, after Peter says: "Sixty divided by twenty gives three months. We should distinguish that from the board's twenty-thousand lower threshold." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 2, after Peter says: "The headline says a hundred eighty thousand in the bank, so people are reading that as nine months at twenty thousand a month. What are we missing?" It addresses that point, not the missing turn in the supplied exchange.

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E / Conversation

1. restricted fund

Turn 2. Restricted fund money is limited to the separate program and cannot cover this operating shortfall under the stated facts.

08 / Answers and explanations / continued

2. available funds

Turn 4. Available funds are the sixty thousand explicitly usable for this shortfall after the stated restrictions and other commitments.

3. net cash outflow

Turn 6. Net cash outflow is payments less receipts over the period; the stated twenty-thousand monthly amount drives this simplified projection.

4. cash runway

Turn 8. Cash runway is three months to exhausting the sixty-thousand available balance, assuming the twenty-thousand monthly net outflow continues.

5. reserve policy

Turn 10. Reserve policy establishes this organization's own threshold; the twenty-thousand floor is not a universal requirement for every nonprofit.

6. prospective gift

Turn 12. A prospective gift is potential support rather than a confirmed promise; this proposal has no commitment or payment date and must remain outside the available-cash base case.

7. cost reduction

Turn 14. Cost reduction needs a start date and service consequences to support a real decision, not only an estimated saving.

8. drawdown

Turn 16. Drawdown uses the relevant available buffer and needs the appropriate authority; it does not permit spending the separate restricted program funds.

9. review trigger

Turn 18. Review trigger specifies when changed receipts, outflows, or thresholds require reconsideration instead of leaving the response undefined.

10. replenishment plan

Turn 20. Replenishment plan explains how a used buffer could be rebuilt, with assumptions identified rather than a guaranteed future donation.

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08 / Answers and explanations / continued

F / Accuracy and scope

F1. What is wrong with relabeling the restricted \$120,000 as operating reserves?

D. An internal label does not remove the stated restriction.

The stated purpose restriction remains in force regardless of the name used in an internal report.

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F2. What makes a cost-reduction option decision-ready?

C. Timing, expected savings, service effects, authority, and a review trigger

The board needs the operational consequences and decision conditions as well as the estimated financial benefit.

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F / Guided speaking

1. \$60,000

Chair: Cash available for this shortfall is \$60,000.

Turn 1. The ninety-thousand restricted amount is excluded, leaving sixty thousand available after commitments.

2. \$15,000

Officer: Monthly net outflow is \$15,000.

Turn 2. The scenario states this constant monthly assumption for the simplified projection.

3. four months

Chair: Time to exhaust the available cash is four months.

Turn 3. Sixty thousand divided by fifteen thousand gives four months to exhaustion under the assumption.

4. two months

Officer: Time to reach the reserve floor is two months.

Turn 4. Sixty thousand less the thirty-thousand floor leaves thirty thousand, covering two monthly outflows.

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08 / Answers and explanations / continued

F / Rebuild the exchange

1. Rebuild the exchange from "Cash in the account is not all available for the shortfall". Peter: "We need options that explain more than a number. A reduction could take time to implement or affect services differently." Asha: [missing response] Peter: "Another option may involve using part of the buffer under an approved plan. We would need to explain the authority and recovery path." Which response belongs in the gap?

D. A cost reduction should show when savings begin, the effect on services, and any relevant commitments. An immediate-looking saving is misleading if the outflow changes only after several months.

A Not here. This line belongs to turn 4, after Peter says: "Then what amount can we actually use, after accounting for the other obligations already identified?" It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 2, after Peter says: "The headline says a hundred eighty thousand in the bank, so people are reading that as nine months at twenty thousand a month. What are we missing?" It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 8, after Peter says: "Sixty divided by twenty gives three months. We should distinguish that from the board's twenty-thousand lower threshold." It addresses that point, not the missing turn in the supplied exchange.

D Correct. This is Asha's response in turn 14. It connects Peter's preceding point with Peter's follow-up. Cost reduction needs a start date and service consequences to support a real decision, not only an estimated saving.

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Review 1 / Explanations

Cumulative review

1. A colleague needs the term for this meaning: An explanation of how actions are expected to produce change in a context. Which term fits?

B. theory of change

A Not here. participant: A person taking part in a program activity. The usual combination is "count participants".

B Correct. theory of change: An explanation of how actions are expected to produce change in a context. The usual combination is "test the theory of change".

C Not here. outcome: A change experienced by the people or systems a program seeks to support. The usual combination is "measure outcomes".

D Not here. indicator: A defined measure used to track a relevant condition or result. The usual combination is "select an indicator".

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2. A colleague needs the term for this meaning: Movement of an allocation between budget categories or activities. Which term fits?

C. budget transfer

A Not here. restricted grant: Funding limited to specified uses or conditions. The usual combination is "review the restricted grant".

B Not here. reporting obligation: A requirement to provide specified information to the funder. The usual combination is "meet reporting obligations".

C Correct. budget transfer: Movement of an allocation between budget categories or activities. The usual combination is "request a budget transfer".

D Not here. commitment: An action creating an obligation or promise to use resources. The usual combination is "avoid an unauthorized commitment".

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Review 1 / Explanations / continued

3. Rebuild the exchange from "Attendance is an achievement, not a lasting outcome". Nina: "Some participants have told us that suitable jobs are difficult to find locally. That could affect the route even if their applications improve." Joel: [missing response] Nina: "We also use lasting and sustained as if they have an obvious meaning. We have not agreed a period." Which response belongs in the gap?

A. Job availability is an enabling condition to examine. We should not imply that the workshop controls every labor-market factor or that a participant is responsible for every barrier they encounter.

A Correct. This is Joel's response in turn 10. It connects Nina's preceding point with Nina's follow-up. Enabling condition is a circumstance that helps the proposed pathway work; workshop attendance does not establish its presence.

B Not here. This line belongs to turn 2, after Nina says: "I can sign off the two hundred participants, but not proving lasting employment improvement. That phrase has crept into the donor update without any employment follow-up behind it." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 20, after Nina says: "The donor can then see both the achievement and the remaining work, without assuming the program has already demonstrated its long-term effect." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 6, after Nina says: "Our idea is that better application skills lead to better applications and eventually to employment that lasts." It addresses that point, not the missing turn in the supplied exchange.

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Review 1 / Explanations / continued

4. Rebuild the exchange from "Mission fit does not change the grant agreement".

Amir: "I will tell them that the variation is being requested, not that the donor has approved it. We can also check other funding options." **Leah:** [missing response]

Amir: "Once the decision arrives, I will update the activity plan and the reporting arrangements to match the approved position." Which response belongs in the gap?

A. That is the right status. Any alternative permitted expenditure needs its own review under the relevant source. We should not solve one restricted-funding problem by assuming another pot has no conditions.

A Correct. This is Leah's response in turn 18. It connects Amir's preceding point with Amir's follow-up. Another funding source has its own terms, which also need checking before use.

B Not here. This line belongs to turn 10, after Amir says: "Then I should prepare a request for three thousand and explain why we want to change the activity." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 16, after Amir says: "They are asking for a deposit today to hold the supplies. I have not agreed. Does a small reservation payment still count as committing the grant?" It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 4, after Amir says: "The donor contact said the idea was worthwhile when I mentioned it last week. I took that as a positive sign." It addresses that point, not the missing turn in the supplied exchange.

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Review 2 / Explanations

Cumulative review

1. A colleague needs the term for this meaning: Systematic assessment of an intervention and its results or value. Which term fits?

D. evaluation

A Not here. counterfactual: The unobserved or estimated result without the intervention. The usual combination is "assess the counterfactual".

B Not here. triangulation: Comparison of different sources or methods to examine a finding. The usual combination is "use triangulation".

C Not here. mean score: The arithmetic average of scores in a defined group. The usual combination is "calculate the mean score".

D Correct. evaluation: Systematic assessment of an intervention and its results or value. The usual combination is "commission an evaluation".

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2. A colleague needs the term for this meaning: An arrangement reserving transport for stated requirements. Which term fits?

C. transport booking

A Not here. action owner: The person responsible for a specified next step. The usual combination is "name the action owner".

B Not here. field visit: An organized visit to a program location. The usual combination is "coordinate a field visit".

C Correct. transport booking: An arrangement reserving transport for stated requirements. The usual combination is "amend the transport booking".

D Not here. dependency: A condition another activity relies on. The usual combination is "identify a scheduling dependency".

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Review 2 / Explanations / continued

3. Rebuild the exchange from "Mission fit does not change the grant agreement".

Amir: "Then I should prepare a request for three thousand and explain why we want to change the activity." **Leah:** [missing response] **Amir:** "We would need to explain whether fewer reading sessions or fewer materials would result. I should not leave the original promise untouched on paper." Which response belongs in the gap?

C. Yes, a specific variation request. Include the amount, proposed work, timing, and the effect on the reading-program commitments, so the donor can assess the actual change rather than a vague idea.

A Not here. This line belongs to turn 16, after Amir says: "They are asking for a deposit today to hold the supplies. I have not agreed. Does a small reservation payment still count as committing the grant?" It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 18, after Amir says: "I will tell them that the variation is being requested, not that the donor has approved it. We can also check other funding options." It addresses that point, not the missing turn in the supplied exchange.

C Correct. This is Leah's response in turn 10. It connects Amir's preceding point with Amir's follow-up. The request seeks an authorized change; submitting it does not itself approve the transfer.

D Not here. This line belongs to turn 4, after Amir says: "The donor contact said the idea was worthwhile when I mentioned it last week. I took that as a positive sign." It addresses that point, not the missing turn in the supplied exchange.

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Review 2 / Explanations / continued

4. Rebuild the exchange from "A partner changes the visit, but the community has not agreed". Nadia: "Once the community responds and you have the transport position, the coordinator can assess the complete picture rather than two separate assumptions." Ben: [missing response] Nadia: "I will tell the partner that their availability is noted, but community confirmation and transport checks are still pending." Which response belongs in the gap?

A. Then we can update the itinerary from the recorded decision. Everyone should receive the same date, meeting details, and responsibilities, including any remaining conditions that affect the visit.

A Correct. This is Ben's response in turn 18. It connects Nadia's preceding point with Nadia's follow-up. Itinerary sets out the agreed visit details; it should reflect the recorded decision rather than a provisional calendar change.

B Not here. This line belongs to turn 14, after Nadia says: "I will update the coordinator by sixteen hundred local time after contacting the community. If I have not received a response, I will say that clearly." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 12, after Nadia says: "When can you give the coordinator that information? The partner is waiting for a response, and we need a realistic next update." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 2, after Nadia says: "RiverLink's partner can move from the tenth to the twelfth. They have sent a revised calendar invite, but I have not checked that date with the community yet." It addresses that point, not the missing turn in the supplied exchange.

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Review 3 / Explanations

Cumulative review

1. A colleague needs the term for this meaning: A person's communication of information about an experience or event. Which term fits?

A. disclosure

A Correct. disclosure: A person's communication of information about an experience or event. The usual combination is "receive a disclosure".

B Not here. designated lead: The person assigned responsibility for a defined safeguarding function. The usual combination is "contact the designated lead".

C Not here. factual record: An account separating known facts, sources, and uncertainties. The usual combination is "create a factual record".

D Not here. professional boundary: A limit defining appropriate conduct in a work relationship. The usual combination is "maintain professional boundaries".

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2. A colleague needs the term for this meaning: Demonstrated ability to perform a task appropriately. Which term fits?

B. competence

A Not here. escalation route: The designated path for an issue needing another level of responsibility. The usual combination is "use the escalation route".

B Correct. competence: Demonstrated ability to perform a task appropriately. The usual combination is "assess competence".

C Not here. refresher training: Further training to maintain or update relevant knowledge and skills. The usual combination is "schedule refresher training".

D Not here. role description: A statement of duties, responsibilities, and limits. The usual combination is "review the role description".

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Review 3 / Explanations / continued

3. Rebuild the exchange from "A partner changes the visit, but the community has not agreed". Nadia: "There could be an extra charge. We should know that before telling the partner that the revised arrangements are settled." Ben: [missing response] Nadia: "When can you give the coordinator that information? The partner is waiting for a response, and we need a realistic next update." Which response belongs in the gap?

B. I will check the change fee and any other relevant terms. Neither of us can approve additional spending, so I will identify what needs to go to the authorized approver.

A Not here. This line belongs to turn 14, after Nadia says: "I will update the coordinator by sixteen hundred local time after contacting the community. If I have not received a response, I will say that clearly." It addresses that point, not the missing turn in the supplied exchange.

B Correct. This is Ben's response in turn 10. It connects Nadia's preceding point with Nadia's follow-up. Change fee is a possible cost of altering the reservation; it needs verification and the relevant spending approval.

C Not here. This line belongs to turn 2, after Nadia says: "RiverLink's partner can move from the tenth to the twelfth. They have sent a revised calendar invite, but I have not checked that date with the community yet." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 12, after Nadia says: "When can you give the coordinator that information? The partner is waiting for a response, and we need a realistic next update." It addresses that point, not the missing turn in the supplied exchange.

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Review 3 / Explanations / continued

4. Rebuild the exchange from "An enthusiastic offer is not a driving authorization".

Luis: "For today, I will stay with packing and stock counting. Please tell me if there is another task within my current role that would help." **Grace:** [missing response]

Luis: "Once another driver is confirmed, I can help the team prepare the correctly labeled packages for collection." Which response belongs in the gap?

B. I will confirm the task allocation for this shift. That lets us use your help effectively while the transport lead handles the replacement arrangement and any necessary schedule change.

A Not here. This line belongs to turn 14, after Luis says: "If I complete the training, would that mean I can start driving on the next shift?" It addresses that point, not the missing turn in the supplied exchange.

B Correct. This is Grace's response in turn 18. It connects Luis's preceding point with Luis's follow-up. Task allocation keeps Luis working within his approved duties while transport cover is arranged.

C Not here. This line belongs to turn 8, after Luis says: "Is there a list you can check, or does the decision depend on who happens to be coordinating the shift?" It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 2, after Luis says: "We are short a driver, and the boxes are nearly ready. I have driven vans before. Could I cover this delivery, or do you need to check my role first?" It addresses that point, not the missing turn in the supplied exchange.

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Review 4 / Explanations

Cumulative review

1. A colleague needs the term for this meaning: A request for financial or other support. Which term fits?

C. fundraising appeal

A Not here. policy position: An organization's stated view on a public issue or proposed measure. The usual combination is "explain the policy position".

B Not here. extrapolation: Extending a finding beyond the observations or population measured. The usual combination is "avoid unsupported extrapolation".

C Correct. fundraising appeal: A request for financial or other support. The usual combination is "prepare a fundraising appeal".

D Not here. self-selection: Entry into a sample through people's own decision to participate. The usual combination is "disclose self-selection".

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2. A colleague needs the term for this meaning: Money held in the stated accounts at a point in time. Which term fits?

A. cash balance

A Correct. cash balance: Money held in the stated accounts at a point in time. The usual combination is "reconcile the cash balance".

B Not here. commitment: An obligation or planned use relevant to available resources. The usual combination is "account for existing commitments".

C Not here. board paper: A document presenting information or a decision for a governing board. The usual combination is "prepare a board paper".

D Not here. pledge: A promise of future support, with its conditions and payment terms specified; not merely an expression of interest. The usual combination is "verify a donor pledge".

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Review 4 / Explanations / continued

3. Rebuild the exchange from "An enthusiastic offer is not a driving authorization".

Luis: "Then who can arrange another driver? I can finish the packing while you find out." **Grace:** [missing response] **Luis:** "I would like to help with driving in future. Could we make that part of my role instead of having this problem again?" Which response belongs in the gap?

D. I will contact the transport lead for authorized cover. We may need to revise the delivery arrangement, but urgency does not give either of us permission to bypass the requirement.

A Not here. This line belongs to turn 4, after Luis says: "I understand that it is outside my usual tasks, but I have plenty of ordinary driving experience. Is that not enough for a short trip?" It addresses that point, not the missing turn in the supplied exchange.

B Not here. This line belongs to turn 6, after Luis says: "I see. I was trying to keep the delivery moving, not put you on the spot. What can I do now that will actually help?" It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 2, after Luis says: "We are short a driver, and the boxes are nearly ready. I have driven vans before. Could I cover this delivery, or do you need to check my role first?" It addresses that point, not the missing turn in the supplied exchange.

D Correct. This is Grace's response in turn 10. It connects Luis's preceding point with Luis's follow-up. The transport lead is responsible for arranging authorized cover; Luis cannot approve himself.

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4. Rebuild the exchange from "Cash in the account is not all available for the shortfall". Peter: "Let us include a point at which the board revisits the plan if receipts are late or the outflow is higher." **Asha:** [missing response] **Peter:** "I will ask for a paper showing the available amount, two-month threshold, three-month exhaustion point, and the consequences of each authorized option." Which response belongs in the gap?

A. Set a clear review trigger, alongside the next decision date. That turns the forecast into a monitored plan rather than a single reassuring number presented without conditions.

A Correct. This is Asha's response in turn 18. It connects Peter's preceding point with Peter's follow-up. Review trigger specifies when changed receipts, outflows, or thresholds require reconsideration instead of leaving the response undefined.

B Not here. This line belongs to turn 10, after Peter says: "So the floor is a decision threshold under our policy, not a claim that every organization needs the same amount in reserve." It addresses that point, not the missing turn in the supplied exchange.

C Not here. This line belongs to turn 20, after Peter says: "I will ask for a paper showing the available amount, two-month threshold, three-month exhaustion point, and the consequences of each authorized option." It addresses that point, not the missing turn in the supplied exchange.

D Not here. This line belongs to turn 2, after Peter says: "The headline says a hundred eighty thousand in the bank, so people are reading that as nine months at twenty thousand a month. What are we missing?" It addresses that point, not the missing turn in the supplied exchange.

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Additional case 1 / Explanations

Extended conversation

1. match funding

Turn 2. Match funding adds a sponsor contribution according to agreed terms; this offer matches eligible public gifts dollar for dollar only within its stated limit and window.

2. matching cap

Turn 4. The matching cap is the sponsor's maximum additional contribution, here 8,000; it is not a cap on public gifts or on the combined total.

3. eligibility reconciliation

Turn 6. The eligibility reconciliation checks public transactions against the matching agreement; the exercise explicitly confirms all 10,000 qualifies before applying the 8,000 cap.

4. cash received

Turn 8. Cash received is money that has actually arrived; the public's 10,000 has been received, but the sponsor's confirmed 8,000 remains unpaid.

5. donor message

Turn 11. The donor message must reflect the exhausted matching allocation; further gifts remain welcome, but the current agreement cannot support a promise that new gifts will also be doubled.

6. campaign window

Turn 15. The campaign window sets the period for the matching offer, but remaining time does not create additional sponsor capacity after the stated cap has been exhausted.

[Return to the conversation, page 105](#)

Transfer exchange

1. 5

Fundraiser: The sponsor match is capped at \$5 thousand.

Turn 1. The agreement limits the additional sponsor contribution to five thousand despite higher eligible public gifts.

Additional case 1 / Explanations / continued

2. 11.2

Officer: Combined confirmed support is \$11.2 thousand.

Turn 2. Six thousand two hundred plus the five-thousand match totals eleven thousand two hundred.

3. 6.2

Fundraiser: Cash actually received is \$6.2 thousand.

Turn 3. Only the public gifts have arrived; the confirmed sponsor contribution is still unpaid.

4. zero

Officer: Further match capacity under this agreement is zero.

Turn 4. The full five-thousand matching allocation has been used, leaving no capacity for additional matches.

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Additional case 2 / Explanations

Extended conversation

1. direct costs

Turn 2. Direct costs in this exercise are 48,000 staff plus 12,000 materials, totaling 60,000; the separately allocated support cost has not been included in that total.

2. allocation basis

Turn 4. The allocation basis is the documented method assigning a share of common support to this project; it should reflect the actual method, not a label chosen merely to fit a cap.

3. indirect-cost allowance

Turn 6. The indirect-cost allowance is ten percent of the stipulated 60,000 direct-cost base, or 6,000; the cap does not mean the actual shared costs disappear.

4. funding gap

Turn 8. The funding gap is 69,000 full cost minus 66,000 offered funding, or 3,000; no other source has been approved in the supplied facts.

5. full-cost recovery

Turn 11. Full-cost recovery means obtaining funding for the direct and appropriately allocated support costs of the work; funding only the direct lines does not achieve it here.

6. co-funding

Turn 14. Co-funding is a contribution from another permitted source alongside this grant; here it is only an option and must not be described as secured before authorization.

[Return to the conversation, page 110](#)

Transfer exchange

1. 5

Director: The indirect-cost allowance is \$5 thousand.

Turn 1. Twelve and a half percent of forty thousand equals five thousand, not 12.5 percent of the eventual total.

Additional case 2 / Explanations / continued

2. 45

Officer: The offered grant totals \$45 thousand.

Turn 2. Forty thousand direct costs plus five thousand allowed indirect costs gives forty-five thousand.

3. 47

Director: The project's full cost is \$47 thousand.

Turn 3. Forty thousand direct costs plus the seven-thousand actual allocation totals forty-seven thousand.

4. 2

Officer: The unfunded difference is \$2 thousand.

Turn 4. Forty-seven thousand in full cost minus forty-five thousand offered leaves two thousand without an approved funding source.

[Return to the conversation, page 113](#)

Additional case 3 / Explanations

Extended conversation

1. consent record

Turn 2. The consent record specifies the participant's agreed use and exclusions; it covers a first-name-only written report story and expressly excludes the campaign's portrait and advertising use.

2. scope of permission

Turn 4. The scope of permission identifies exactly which material, identity details, audience, and channel are agreed; keeping one permitted use does not authorize the excluded uses.

3. publication hold

Turn 6. A publication hold stops the draft from being released while the misuse is corrected; it is an immediate control, not a promise that an already published item has been recalled.

4. informed choice

Turn 8. Informed choice means deciding with an understanding of the proposed use and the ability to decline it; here Rina accepts a specific report use while refusing different campaign uses.

5. anonymization

Turn 10. Anonymization concerns whether a person can be identified; removing a surname while retaining a recognizable portrait does not make Rina anonymous or authorize the excluded use.

6. withdrawal process

Turn 14. The withdrawal process records and acts on a change of permission under applicable policy and law; it must distinguish stopping controllable future uses from recalling copies already distributed.

[Return to the conversation, page 115](#)

Transfer exchange

1. newsletter

Officer: The permitted publication is the member newsletter.

Turn 1. The consent covers that specific newsletter, not every communication produced by the organization.

Additional case 3 / Explanations / continued

2. quote

Leo: The permitted material is a written quote.

Turn 2. Leo agrees to the written quote, while the portrait is expressly excluded.

3. stopped

Officer: The queued social post must be stopped.

Turn 3. Its channel and recognizable portrait both exceed the stated permission, so it cannot proceed as drafted.

4. services

Leo: Declining this publicity does not affect my services.

Turn 4. The fictional policy explicitly separates service access from willingness to provide publicity permission.

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Find a phrase by purpose

Mission, Theory of Change, and Program Design

Recognize the achievement: Two hundred distinct participants attended this quarter.

Name the evidence: That figure comes from checked registration records.

Limit the claim: It measures participation, not lasting employment.

[Full phrase bank, page 7](#)

Grant Proposals and Donor Restrictions

Acknowledge the need: The food-outreach idea addresses a real program concern.

Identify the restriction: N14 currently funds reading sessions and approved reading materials.

State the balance: Six thousand dollars remains unspent.

[Full phrase bank, page 18](#)

Monitoring, Evaluation, and Learning

State the measured group: Sixty participants completed both tests.

State the result: Their mean score increased from forty to fifty-eight.

Use the correct unit: The observed increase is eighteen score points.

[Full phrase bank, page 31](#)

Field Operations and Partner Coordination

Name the original arrangement: The visit and transport were arranged for the tenth.

Identify the proposed change: The partner is asking to move the visit to the twelfth.

Limit the confirmation: Only the partner's team has confirmed that date.

[Full phrase bank, page 42](#)

Find a phrase by purpose / continued

Safeguarding and Incident Reporting

Welcome the report: Thank you for bringing this concern to me.

Check immediate safety: Is anyone in immediate danger or in need of urgent assistance?

Clarify the source: Did you witness the interaction, or are you describing what you were told?

[Full phrase bank, page 54](#)

Volunteer Management and Training

Recognize the offer: Thank you for offering to cover the delivery.

State the current role: Your approved duties are packing and stock counting.

Separate experience from permission: Your driving experience does not establish authorization for this van.

[Full phrase bank, page 67](#)

Advocacy, Public Messaging, and Neutrality

Pause publication: This headline needs an evidence check before release.

Trace the figure: What is the original source for one in three?

Name the population: The survey involved eighty self-selected adult respondents.

[Full phrase bank, page 81](#)

Board Reporting and Sustainability

Separate the categories: Of the cash balance, one hundred twenty thousand is restricted to another program.

State the usable amount: Sixty thousand is available for this shortfall after other commitments.

State the assumption: We assume net unrestricted outflow remains twenty thousand a month.

[Full phrase bank, page 93](#)

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References and publication notes

All cases, organizations, figures, and conversations are fictional teaching material, not transcripts. Communication practice does not replace qualified advice or current workplace procedures.

[1] OECD. Glossary of Key Terms in Evaluation and Results-Based Management, second edition (2023).

Background terminology for program pathways and evaluation. Definitions and fictional dialogues are original paraphrases, not a reproduction of the glossary. Source checked 1 October 2026.

https://www.oecd.org/en/publications/glossary-of-key-terms-in-evaluation-and-results-based-management-for-sustainable-development-second-edition_632da462-en-fr-es.html

[2] CHS Alliance, Groupe URD, and Sphere. Core Humanitarian Standard, 2024 edition.

Background on accountable communication, coordination, safe reporting, and competent support. The exercises are original cases, not an adaptation of the standard. Source checked 1 October 2026.

https://www.corehumanitarianstandard.org/_files/ugd/e57c40_f8ca250a7bd04282b4f2e4e810daf5fc.pdf

[3] Charity Commission. Making grants to charities and other organisations.

England-and-Wales guidance on grant purposes, written terms, and monitoring. The invented award controls the exercise; actual permissions require the relevant review. Source checked 1 October 2026.

<https://www.gov.uk/guidance/making-grants-to-charities-and-other-organisations>

[4] Charity Commission. Charity reserves: building resilience (CC19).

England-and-Wales guidance on available reserves and restricted funds. Fictional cash forecasts illustrate communication, not a universal reserve target or spending recommendation. Source checked 1 October 2026.

<https://www.gov.uk/government/publications/charity-reserves-building-resilience-cc19/charities-and-reserves>

Companion course

The website offers the eight-lesson course and related practice. This book can be used independently. No audio access or external account is needed for its exercises.

<https://englishladder.com/efsp-nonprofit-ngo.html>

Make the mission understandable. Keep commitments grounded in evidence.

Eight mission-focused conversations: explain a program pathway, check a proposed grant change, interpret evaluation findings, coordinate a changed field visit, receive a safeguarding concern, maintain volunteer boundaries, verify a fundraising claim, and explain available reserves.

Mission, Theory of Change, and Program Design

Two hundred distinct participants is a verified reach figure in this case. It is not an employment count. Keep the achievement, the measurement period, and the unit intact instead of upgrading participation into a result the records do not contain.

Monitoring, Evaluation, and Learning

The mean rose by 18 points on a 100-point test among the same 60 paired completers. That is not an employment percentage or a result for every enrollee. Missing paired results for 15 of 75 mean 20% lack that comparison.

Grant Proposals and Donor Restrictions

Unspent does not mean unrestricted. The \$6,000 retains the agreement's restrictions, and the proposed transfer is half that balance. The signed N14 terms, not a general view that the new activity is worthwhile, determine the stated approval requirement.

Field Operations and Partner Coordination

The partner is available on 12 October, but the visit is not yet confirmed for that date. Keep availability, community agreement, transport feasibility, and spending authority separate. A message sent or acknowledged does not establish all four.

Make the mission understandable. Keep commitments grounded in evidence. / continued

Phil Stilwell

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