

TOOLKIT & TEMPLATES

Beneficiary **Feedback** Collection Templates

Survey Templates, Consent Forms & Data Collection Tools for NZ and
Australian Not-for-Profit Organisations

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Survey Templates

Consent Forms

Privacy Frameworks

Cultural Responsiveness

Te Reo Maori

Data Management

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A complete toolkit across 12 sections for meaningful beneficiary feedback

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Introduction to Beneficiary Feedback

What it is, who this toolkit is for, and the NZ/AU context



Beneficiary feedback is systematic information gathered from the people your organisation serves about their experiences, needs, and the outcomes they've achieved. It moves beyond satisfaction surveys to capture meaningful insights that can improve services and demonstrate impact.

The Feedback Spectrum

- Experience Feedback** How people experienced your service. "The staff made me feel welcome and respected."
- Satisfaction Feedback** How satisfied people are with services received. "I am satisfied with the support I received."
- Outcome Feedback** What changed as a result of the service. "I now have the skills to manage my finances."
- Suggestion Feedback** Ideas for improvement. "It would help to have evening appointments."
- Complaint Feedback** Concerns or issues raised. "I wasn't informed about changes to my case."

Who This Toolkit Is For

- **Programme managers** wanting to establish feedback systems
- **Service delivery staff** collecting feedback from clients
- **Quality and evaluation staff** designing measurement approaches
- **CEOs and leadership** building feedback into organisational culture
- **Board members** ensuring accountability to those served

The NZ/AU Legal and Cultural Landscape

- ### New Zealand
- Privacy Act 2020 requirements
 - Te Tiriti o Waitangi obligations
 - Te Mana Raraunga (Maori Data Sovereignty)
 - Social Services Accreditation requirements
 - Whanau-centred, strengths-based approaches

- ### Australia
- Privacy Act 1988 and APPs
 - State-specific privacy requirements
 - ACNC governance expectations
 - NDIS Quality and Safeguards requirements
 - Closing the Gap Indigenous data sovereignty

Why Beneficiary Feedback Matters

The case for feedback, common mistakes and ethical principles

Benefits of Systematic Feedback

For Your Organisation

- Understand what's working and what needs improvement
- Identify unmet needs and emerging issues
- Demonstrate impact to funders and stakeholders
- Build trust and credibility with communities
- Create culture of learning and continuous improvement

For Beneficiaries

- Voice is heard and valued
- Contribute to service improvement
- Experience greater agency and empowerment
- Build trust in the organisation
- See services shaped by their needs

Common Mistakes to Avoid

Six Critical Mistakes

1. **Collecting but not acting:** Close the loop — tell people how their feedback was used
2. **Only measuring satisfaction:** Include questions about actual change in people's lives
3. **Making feedback optional:** Systematically collect from all participants, including those who disengage
4. **Ignoring cultural context:** Adapt methods to cultural preferences and languages
5. **Creating power imbalances:** Use independent collection methods where possible
6. **Collecting but not protecting:** Robust privacy protections from collection to disposal

Ethical Principles for Feedback Collection

1. Voluntariness

Participation is always optional. No negative consequences for declining. Consent is informed and ongoing.

2. Safety

Feedback processes don't cause harm. Sensitive topics handled appropriately. Support available if needed.

3. Privacy

Personal information protected. Anonymity options where appropriate. Data only used for stated purposes.

4. Cultural Respect

Methods appropriate for participants. Language and concepts accessible. Indigenous data sovereignty respected.

5. Power Awareness

Power dynamics acknowledged. Independent collection where possible. Honest feedback encouraged and protected.

6. Action Orientation

Feedback used for improvement. Changes communicated back. Participants see their voice matters.

Privacy & Consent Framework

NZ Privacy Act 2020, Australian Privacy Principles & Indigenous data sovereignty



New Zealand Privacy Act 2020

Key Principles for Feedback Collection

Principle 1: Purpose of Collection

- Only collect if you have a lawful purpose connected to your organisation's functions

Principle 3: Collection from Subject

- Individual must be aware of fact, purpose, recipients, rights, and voluntariness

Principle 4: Manner of Collection

- Collection must be lawful, not unfair or unreasonably intrusive

Principle 5: Storage and Security

- Protect against loss, unauthorised access, use, modification, or disclosure

Principle 10: Use of Information

- Only use for the purpose it was collected, unless an exception applies

Australian Privacy Principles (APPs)

Key Requirements for Feedback Context

- **APP 1:** Have a clearly expressed privacy policy
- **APP 3:** Only collect information reasonably necessary for your functions
- **APP 5:** Notify individuals of identity, purpose, access rights and complaint process
- **APP 6:** Only use or disclose for primary purpose, reasonably expected secondary purpose, or with consent
- **APP 11:** Take reasonable steps to protect from misuse; destroy or de-identify when no longer needed

Maori Data Sovereignty — Te Mana Raraunga

Key Principles

- **Rangatiratanga (Authority):** Maori have rights to their own data; work in partnership
- **Whakapapa (Relationships):** Data connects to people, whanau, and whenua
- **Whanaungatanga (Obligations):** Organisations must give back to communities
- **Kotahitanga (Collective benefit):** Data should benefit Maori collectively; avoid deficit narratives
- **Manaakitanga (Reciprocity):** Handle data with respect and care
- **Kaitiakitanga (Guardianship):** Active protection for future generations

Designing Your Feedback Approach

Strategy framework, method selection and response rate strategies



Matching Methods to Context

| CONTEXT | RECOMMENDED METHODS | CONSIDERATIONS |
|--------------------------|---|---------------------------------|
| High literacy population | Written surveys, online forms | Simple language still important |
| Low literacy population | Verbal surveys, phone calls, pictorial | Staff or peer support |
| Young children | Observation, pictorial, play-based | Parent/caregiver input |
| Youth | Digital surveys, social media, peer | Confidentiality from parents |
| Elderly | Phone calls, face-to-face, larger print | Time and patience |
| Culturally diverse | Translated tools, community workers | Cultural advisors |
| Maori | Kanohi ki te kanohi, whanau hui | Maori data sovereignty |
| Disability | Multiple formats, support persons | Individual communication needs |
| Sensitive services | Anonymous options, external collection | Safety and privacy paramount |

Response Rate Strategies

Expected Response Rates

- Exit surveys (paper, in-person): 60–80%
- Mailed surveys: 20–40%
- Online surveys: 20–30%
- Phone follow-up: 30–50%
- Text/SMS surveys: 25–35%

Tips for Better Rates

- Explain purpose clearly — why feedback matters
- Keep surveys short (5–10 minutes ideal)
- Offer multiple methods and incentives (koha)
- Send 1–2 reminders (not more)
- Close the loop — show how feedback was used

Survey Templates by Service Type

Ready-to-adapt surveys for general, youth, whanau, health and employment services



General Service Feedback Survey

GENERAL SERVICE FEEDBACK SURVEY

Your feedback matters. We want to know about your experience so we can improve our services. This survey is voluntary and confidential (5–10 minutes).

Q1. Overall, how satisfied are you with the service you received?

Very satisfied / Satisfied / Neither / Dissatisfied / Very dissatisfied

Q2. How well did the service meet your needs?

Completely / Mostly / Partly / Did not meet my needs

Q3. Were you treated with dignity and respect?

Always / Usually / Sometimes / Rarely or never

Q4. Did staff listen to you and take your views into account?

Always / Usually / Sometimes / Rarely or never

Q5. Did you feel involved in decisions about your support?

Yes, completely / Yes, mostly / A little / Not at all

Q6. As a result of this service, has your situation improved?

Yes, a lot / Yes, a little / Same / Got worse

Q7. Would you recommend this service to others?

Yes, definitely / Yes, probably / Not sure / Probably not / Definitely not

Q8–10. Open feedback: What did we do well? What could we do better? Anything else?

Optional demographics: Gender, Age group, Ethnicity

Youth Services Feedback Survey

YOUTH FEEDBACK SURVEY

Hey! We want to hear from you. Totally optional and anonymous — takes about 5 minutes.

Q1. Overall, what did you think of the service/programme?

Amazing / Good / OK / Not great / Bad

Q2. Did staff make you feel welcome and respected?

Yes, definitely / Mostly / Sometimes / Not really

Q3. Did you feel listened to?

Yes, definitely / Mostly / Sometimes / Not really

Q4. Since being involved, have things got better for you?

Yes, heaps better / Yes, a bit / About the same / Worse

Q5. Would you tell a friend to come here if they needed help?

Definitely / Probably / Maybe / Probably not / Definitely not

Q6-8. What was the best thing? What would make it better? Anything else?

Family/Whanau Services Feedback

Whanau Services Survey — Key Questions

- Did our team treat you and your whanau with respect and manaakitanga (care)?
- Did you feel your cultural needs were understood and respected?
- Were you and your whanau involved in planning and decision-making?
- Did the service respond to your whanau's needs as a whole?
- Since working with our service, has your whanau's situation improved?
- Improvements noticed: relationships, communication, confidence, community connection, children doing better, financial, housing, health

Health & Wellbeing Services Feedback

Health Services Survey — Key Questions

- Did you feel safe while receiving this service?
- Were your cultural and spiritual needs respected?
- Since using this service, how has your overall health or wellbeing changed?
- Do you feel better able to manage your health or wellbeing now?
- How confident are you that you can continue to manage going forward?
- *Note: If any questions are upsetting, support is available. No need to answer.*

Employment & Training Programme Feedback

Employment Programme Survey — Key Questions

- How relevant was the content to your needs?
- As a result of the programme, my confidence/skills have improved: A lot / Somewhat / A little / Not at all
- Skills gained: CV/application, interview, job search, digital, communication, industry-specific, financial literacy
- Do you now have a clearer idea of your career goals?
- Current employment status and whether programme helped

Consent Form Templates

Standard, easy-read, youth and focus group consent forms



Standard Feedback Consent Form

FEEDBACK COLLECTION CONSENT FORM

What we are asking: Your experience of our service, whether it helped you, suggestions for improvement.

How we collect: Written surveys, phone/in-person interviews, focus groups, follow-up contact.

How we use your feedback: Improve services, report to funders (no names), understand what works, plan future services.

How we protect your information: Confidential, names kept separate from comments, reports use combined data, stored securely, authorised staff only, kept for [X] years then destroyed.

Your rights: Completely voluntary, skip any questions, change your mind at any time, no effect on service, can access/correct your information.

Follow-up preference: Phone / Email / Text / No follow-up contact

Name: _____

Signature: _____

Date: _____

Staff witness: _____

Simplified/Easy-Read Consent Form

TELLING US WHAT YOU THINK — CONSENT FORM

What we want to do: Ask you questions about our service. Find out if we helped you. Learn how we can do better.

Your answers are private: We don't tell anyone what you said. We don't use your name. We keep your answers safe.

It's your choice: You don't have to do this. You can stop any time. It won't change the help you get.

Do you want to give us feedback? YES / NO

Can we contact you later? YES (Phone: _____) / NO

Your name: _____

Date: _____

Child/Young Person Consent (with Parent/Guardian)

Two-Part Consent: Young Person + Parent/Guardian

- **Section 1 (Young Person):** Age-appropriate explanation, right to say no, right to skip questions, choose whether parent sees answers
- **Section 2 (Parent/Guardian):** Explanation of what's collected, privacy protections, right to withdraw, contact details
- Young person's answers belong to THEM — respect their privacy preferences

Focus Group/Interview Consent

Focus Group Consent Must Cover

- What is involved (duration, group size, recording)
- Confidentiality limits (cannot guarantee others will keep confidential)
- What participant will receive (koha, refreshments, travel reimbursement)
- Rights: voluntary, can decline any question, can leave without explanation
- Support available if discussion is upsetting
- Participants agree to keep discussions confidential

Culturally Responsive Feedback Tools

Te Reo Maori surveys, visual tools, Pacific languages & whanau hui guides



Te Reo Maori Feedback Survey

HE PATAI WHAKAHOKI KORERO | FEEDBACK SURVEY

1. I te katoa, he pehea to wheako ki to matou ratonga?

Overall, how was your experience with our service?

Pai rawa atu (Excellent) / Pai (Good) / Ahua pai (Okay) / Kaore i pai (Not good) / Kino rawa (Very poor)

2. I whai manaaki koe i nga kaimahi?

Were you shown respect and care by staff?

Ae, i nga wa katoa (Yes, always) / Ae, i te nuinga o te wa (Most of the time) / Etahi wa (Sometimes) / Kao (No)

3. I rongu koe i te haumaruru?

Did you feel safe?

4. I uru koe ki nga whakataua mo to awhina?

Were you involved in decisions about your support?

5. I whakanuia o hiahia ahurea?

Were your cultural needs respected?

6. I ahei koe ki te korero Maori ki nga kaimahi?

Could you speak Te Reo Maori with staff if you wanted?

7-8. Outcomes and recommendation questions (bilingual)

9-11. Open feedback (bilingual): He aha te mea pai rawa atu? Me pehea e pai ake ai? He aha atu ano?

Nga mihi nui ki a koe mo to awhina! Thank you for your feedback!

Pacific Languages Notice

Surveys available in multiple Pacific languages

Samoaan (Gagana Samoa), Tongan (Lea Faka-Tonga), Cook Islands Maori (Te Reo Maori Kuki 'Airani), Niuean (Vagahau Niue), Tokelauan (Te Gagana Tokelau), Fijian (Na Vosa Vakaviti). To request a translated survey or interpreter assistance, contact your organisation.

Whanau Collective Feedback Hui Guide

Whanau Hui Facilitation Checklist

Preparation

- Identify appropriate whanau members to invite
- Check whanau preference for facilitator
- Choose appropriate venue (whanau home, marae, neutral space)
- Arrange koha (food, gift) and prepare kai to share
- Allow minimum 1–1.5 hours

Opening

- Karakia (if appropriate and led by whanau)
- Whakawhanaungatanga — introductions and connections
- Kai together, explain purpose, gain consent

Discussion Topics

- How has your whanau experienced our service?
- Were your tikanga and values respected?
- What has changed? What should we do differently?

Facilitation Tips

- Listen more than you speak; allow silences
- Let whanau lead the direction of korero
- Don't push for information — let it flow naturally

Closing & Post-Hui

- Summarise key themes back to whanau for accuracy check
- Karakia, kai, present koha
- Complete notes within 24 hours; share summary with whanau

Feedback Collection Methods

Comparing paper, online, phone, focus group and other approaches

Method Comparison

| METHOD | STRENGTHS | CHALLENGES | RESPONSE RATE |
|---------------------------|-------------------------------------|--------------------------------------|---------------|
| Paper surveys | Simple, no tech needed, anonymous | Data entry needed, literacy required | 50–80% |
| Online surveys | Efficient, easy analysis, automated | Digital divide, impersonal | 15–30% |
| Phone interviews | Personal, clarification possible | Time-intensive, scheduling | 30–50% |
| Face-to-face | Deep insight, builds relationship | Power dynamics, time | 40–60% |
| Focus groups | Group dynamics, shared perspectives | Confidentiality, dominant voices | N/A |
| Text/SMS | Quick, convenient, high engagement | Very short only | 25–40% |
| Feedback boxes | Anonymous, continuous, simple | Low response, no depth | 5–10% |
| Exit conversations | Immediate, natural, relationship | Power dynamics, not recorded | 70–90% |

Paper Survey Best Practices

Design

- Clear, readable fonts (minimum 12pt)
- High-contrast colours
- Provide enough writing space
- Keep to 1–2 pages where possible
- Multiple language versions available

Collection

- Use sealed drop box for anonymity
- Don't have staff who worked with person collect
- Enter data promptly with consistent coding
- Store paper copies securely
- Destroy after data entry period

Online Survey Best Practices

Platform Options for NZ/AU

- Microsoft Forms (free with 365), Google Forms (free), SurveyMonkey, Typeform, Qualtrics
- Mobile-first design, one question per page for complex surveys, progress indicator
- Confirm data stored in NZ/AU if required; disable IP address collection if anonymous
- Short link or QR code; clear deadline; 1-2 reminders maximum

Focus Group Facilitation

Focus Group Planning

- 6-10 participants ideal; 90-120 minutes duration
- Accessible, private venue with recording equipment (with consent)
- Structure: Opening (10-15 min), Discussion (60-75 min), Closing (10-15 min)
- Discussion topics: Experience, Outcomes, Improvement suggestions
- Stay neutral, encourage all voices, manage dominant participants, watch non-verbal cues

Data Management & Using Feedback

Secure storage, analysis approaches and closing the feedback loop



Feedback Collection Planning Template

FEEDBACK COLLECTION PLAN

Organisation: _____

Programme/Service: _____

Date: _____

Objectives — Key questions you want to answer:

1. _____

2. _____

3. _____

Target Population:

Who: _____

Estimated number: _____

Special Considerations:

Language needs: _____

Accessibility needs: _____

Cultural considerations: _____

Safety considerations: _____

Consent & Privacy:

- Consent process documented
- Privacy notice prepared
- Data storage plan confirmed
- Cultural protocols addressed

Key Principles for Using Feedback

Close the Loop

- Tell participants how their feedback was used
- Share summary findings (anonymised)
- Show what changed as a result
- Build trust for future feedback

Act on Findings

- Identify key themes and patterns
- Prioritise actionable improvements
- Assign responsibility and timelines
- Report to board and funders

Data Storage Checklist

Secure Feedback Data Management

- Store digital data in encrypted, password-protected systems
- Store physical copies in locked cabinets
- Separate identifying information from feedback responses
- Limit access to authorised staff only
- Set retention period and schedule secure destruction
- Back up data regularly
- Confirm data is stored in NZ/AU (for cloud storage)
- Document all data handling procedures

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This toolkit is provided as a general resource. Always ensure feedback collection complies with applicable privacy legislation and is appropriate for your participants and context.