IMPACT TRACKING BEST PRACTICES

01

NCDFIs should understand, develop, and implement an impact matrix system that defines the goals and outcomes they seek to meet in providing services.

02

In developing an impact tracking system, NCDFIs should integrate and streamline systems as much as possible.

03

NCDFIs should evaluate staff capacity and investment in implementing an impact tracking system in order to ensure that it is completely implemented and maintained.

04

Clients should complete forms with a knowledgeable and enthusiastic staff member available to assist in answering questions and ensuring full completion of forms.

05

NCDFIs should utilize a variety of data collection techniques and platforms to meet their clients where they are at in order to provide individualized assistance.

06

NCDFIs should put processes into place that detail the data entry, review, and cleaning processes after data is collected.

07

NCDFIs should maintain back-ups of forms completed by clients.

08

NCDFIs should communicate follow-up expectations with clients early on and should institute strict follow-up procedures and guidelines for staff and clients.

09

NCDFI should meet to review analyzed data (both output and outcome data) in order to evaluate the utility of their forms, the success of their programs, and their progress towards defined goals and outcomes.

10

NCDFIs should record the processes that work best for their impact tracking system so they may be reproduced in the future. These processes should be communicated effectively.

OTIS

OPPORTUNITY THROUGH IMPACTS SYSTEM

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