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2018 Native CDFI Capital Access Convening

*Bringing Native CDFIs, Funders, and
Investors Together to Bring Capital to
Native Communities*





IMPACT TRACKING 101

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Reflect on the processes you already do

Think about your data collection, data entry, and reporting process

- When do you collect data and where? Paper or electronic?
- What types of data do you currently collect?
- What types of forms do your clients fill out?
- Who enters data? Where? How often?
- Do you do any analysis of your data? Who does that? How?
- How do you measure success?
- How do you report on the data you collect?



What is an Impact Measurement Program?

These are things you probably already do

- IMP is the processes and activities that manage your performance and track progress toward your desired goals and outcomes
- Enables the tracking of outcomes and your successes and challenges
- Data to refine and improve your services to best serve your clients and funders



Why have an Impact Measurement Program?

- Speak clearly to your audience(s) and service area(s)
- Reflect your mission and vision
- Meet funder needs and reporting requirements
- Enable your organization to monitor its performance over time



How do you use an Impact Measurement Program?

You probably already do!



Collect it



Analyze it

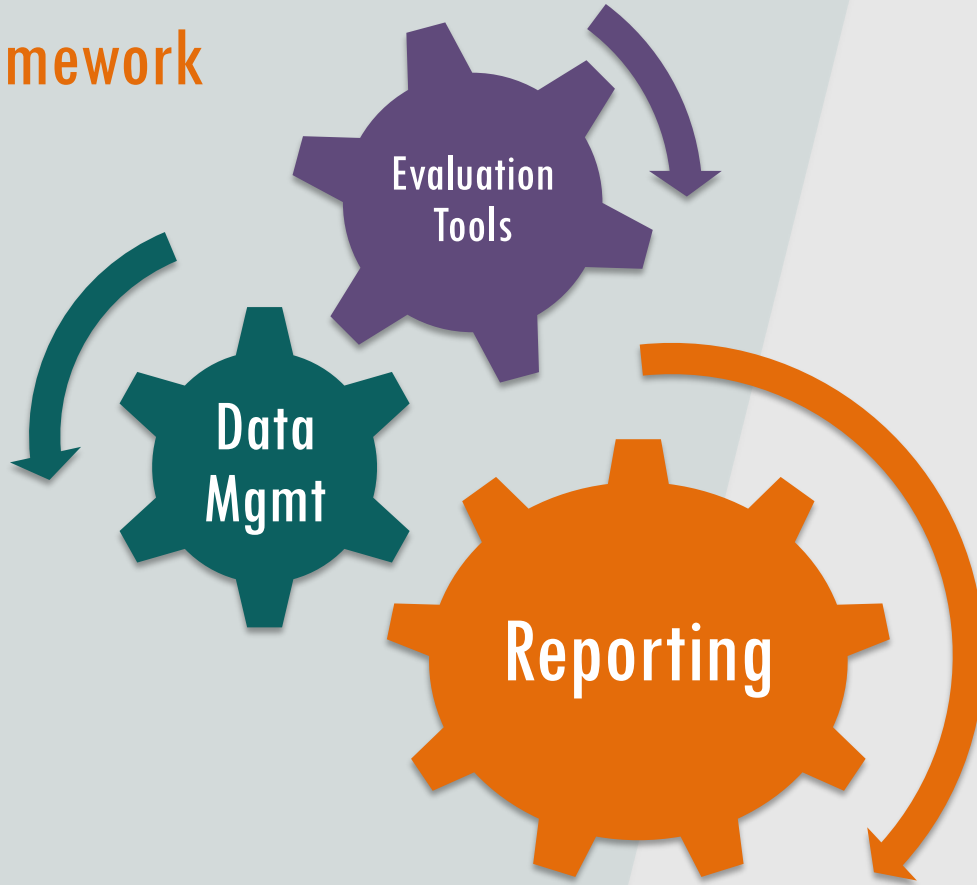


Report it



Components of a Successful IMP

The Framework



Make
reporting
EFFICIENT!



Reflect on what's missing from your current IMP Process?

- What do you need to report on? Are you able to efficiently?
- Are you collecting follow-up information?
- What programs and services are not being tracked to their fullest?
- How can you streamline the data collection process?
- What impacts do you want to see?
- What do you need to know to measure your impact?





Real-Life Examples: Successes and Lessons Learned



Building your IMP

Database Options

- Salesforce
- Outcome Tracker / OTIS
- Excel
- Google

Things to Consider

- Budget
- Time and Staff Capacity
- User-Friendly
 - For Staff AND Clients
- Ease of Reporting

