June 12–14
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nativecdficonvening.org

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!

Evaluation Tools

Data Mgmt

Reporting
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