Recommendations

Topics

- AQS Requirements

- Databases

- Demonstrated Outcomes

Prioritization

Short-Term

Easy to Complete and Low-Impact Tasks

- Written AQS Policies and Procedures
- Demonstrated Outcomes

Long-Term

Difficult to Complete but High-Impact Tasks

- Looking for/Implementing a Database
- Demonstrated Outcomes

AQS Categorization

	Financial	Policy	Procedure	Data Management
Independent	1	29	28	12
Combined	4	18	7	18
Total	**5**	**47**	**35**	**30**

*See Appendix B for a detailed categorization

Policy and Procedure

Easy to Complete but **Low-Impact** and **Time Consuming**

Critical Policies and Procedures

A form of these should exist regardless.

- ◉ Policy regarding the **type of work they do** for funders, organizations, and the public

- ◉ Appoint Individual to **oversee the quality** processes

- ◉ Addition of a **Conflict of Interest** policy

Critical Policies and Procedures

- Written procedure **matching employee skills** to roles

- Policy to identify at least **one person responsible for supervising** staff and volunteers

- Policy to ensure **privacy in meeting** with clients, where required

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Database

Difficult to Implement but **High-Impact**

Example Categories

	Referral From	Referral To	Date/ Meeting #	Attendance	Notes	Next Appointment
Client 1	Ray	N/A	4/15/19 – 2	Yes	Etc.	4/21/19
Client 2	Ex.	Ex.	Ex.	Ex.	Ex.	Ex.
Client 3	Ex.	Ex.	Ex.	Ex.	Ex.	Ex.

Features List

Accessible

Want to get back to helping others? The database must be easy to learn and simple to use.

Secure and Encrypted

It's paramount that client data is secure and encrypted!

Backed Up

When things aren't on paper, it's always good to have a copy somewhere, just in case.

Searchable

Say you want to know how many clients were referred to organization X...

Exportable

Well, organization X might need those client files for your need client.

Access Control

For my eyes only! Permissions are required so volunteers and staff aren't allowed to see the same data.

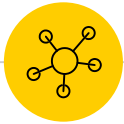## To be successful...

Keep an Open Mind!

Adjustment to any new system can be hectic, annoying, and a number of other things.

Take Copious Notes

To make the most of a database, use it to its full extent!

Continue to Care!

Don't lose sight of impact that you make through human-to-human connections

Demonstrated Outcomes

Key to gaining more funding for Commonside

Database Statistics

- Volunteer Hours x Minimum Wage
- Number of clients helped
- Number of clients turned volunteers
- Number of successful PIP appeals
- Number of PIP granted to clients
- Number of appointments
- Etc.

Case Studies and Stats!

See our other presentation template for short-term ways to demonstrate outcomes and promote Commonside!

Thanks!

See our report for details!