

FROM START TO FINISH: BEST PRACTICES FOR PARTICIPANT TRACKING & FOLLOW-UP PEER-TO-PEER CALL

JULY 25, 2023 | 3:00-4:30 PM (EASTERN)



AGENDA



- Welcome & Introductions
- Establish Effective Peer Sharing Strategies
- Importance of Participant Tracking & Follow-Up
- Discussion
 - Best Practices for Participant Tracking
 - Establishing Meaningful Follow-Up Protocols
 - Overcoming Challenges and Barriers
 - Maximizing Impact through Tracking & Follow-Up
- Q&A and Open Discussion
- Tips & Tools
- Poll
- Wrap-Up

WHAT MAKES AN EFFECTIVE VIRTUAL CONVERSATION?



ENGAGE EVERYONE



BE HEARD AND SEEN



ACKNOWLEDGE SPEAKER



MAXIMIZE MICROPHONES



MINIMIZE NOISE



MAXIMIZE VISUAL DISPLAYS

INTRODUCTIONS

HELLO

my name is

Please share in chat:

- Your name, organization, and role.
- Icebreaker: *“If you could have any superpower to help you with your grant project, what would it be and why?”*
- Burning questions about participant tracking and follow-up.

PARTICIPANT TRACKING & FOLLOW-UP



Monitor and evaluate the effectiveness of your programs



Helps build relationships with participants for future engagement



Measures the success of outcomes



Allows grantees to make data-based decisions for future funding opportunities or program planning

IMPORTANCE OF PARTICIPANT TRACKING & FOLLOW-UP



What challenges are you encountering when tracking participant's outcomes? What about during follow-up?



Does anyone have any strategies they are implementing that could address any of these challenges?

PARTICIPANT TRACKING & FOLLOW-UP OVERVIEW

BEST PRACTICES FOR PARTICIPANT TRACKING



Clearly define and document participant information



Regularly update participant records



Ensure that participant data is secure and confidential



Use a centralized database or software to manage participant information



Provide participants with clear instructions on how to update their information



Create written protocols to ensure consistent participant data entry across partners and staff



Regularly communicate with participants about the program and upcoming events



Use participant feedback to improve the program



Explore incentives to encourage communication and updates

ESTABLISHING MEANINGFUL FOLLOW-UP PROTOCOLS



Establishing meaningful follow-up protocols is critical for ensuring successful outcomes for grant-funded programs. Follow-up protocols can help grantees evaluate program effectiveness, collect feedback from participants, and identify areas for improvement. Here are some tips for establishing meaningful follow-up protocols:

- Define your objectives
- Determine the best follow-up method
- Schedule follow-up activities
- Develop follow-up materials
- Review and analyze follow-up data
- Use additional mechanisms for follow-up beyond surveys or calls (ex. Text messaging software)

OVERCOMING CHALLENGES & BARRIERS

While participant tracking and follow-up are essential for successful grant-funded programs, there are several challenges and barriers that grantees may face during these activities. Here are some tips for overcoming these challenges:

- Participant Resistance
 - *be transparent*
- Technology Issues
 - *make sure it's user-friendly*
- Staff Turnover
 - *documented procedures*
- Resource Constraints
 - *align with goals and objectives*
- Time Constraints
 - *efficient processes*



MAXIMIZING IMPACT THROUGH TRACKING & FOLLOW-UP

Maximizing impact through tracking and follow-up is critical for the success of grant-funded programs. This involves setting up a comprehensive system for monitoring participant progress and tracking outcomes.

Here are some tips for maximizing impact through tracking and follow-up:



- Establish Clear Objectives
- Set Up A Tracking System
- Develop Follow-Up Protocols
- Collect & Analyze Data
- Make Data-Driven Decisions



Q&A SESSION & OPEN DISCUSSION

TIPS & TOOLS

TIPS & TOOLS



Here are some tips and tools for successful participant tracking and follow-up:

- Use a Tracking Software
- Keep Contact Information Current
- Schedule Follow-Up Activities
- Be Consistent and Clear
- Use Automated Survey Tools
- Send Reminders
- Establish Tracking Metrics

POLL



On a scale of 1 to 5, with 1 being the lowest and 5 being the highest, how useful was this call for your participant tracking and follow-up efforts?

- 1 - Not at all useful
- 2 - Slightly useful
- 3 - Moderately useful
- 4 - Very useful
- 5 - Extremely useful

RESOURCES

- **Tracking and Engagement PPT**

This resource features a wide variety of strategies, tools, and resources that you can use to track your participants

- **E-Learning on Post-Program Placement and Data Entry - Ensuring and Tracking Participant Success**

In these videos and e-learning training series, you will find helpful information on both ensuring your participants' success in entering the world of work, and in recording that success.



STAFFING ISSUES: FINDING SOLUTIONS THROUGH COLLABORATIVE EFFORTS

AUGUST 22, 2023
PEER-TO-PEER CALL



THANK YOU!