



# Confirming operational readiness

This checklist reviews essential operational systems and information an organization must understand prior to the first PPI data collection. Managers can use this checklist as both a resource when developing the implementation plan and as a reminder for staff. Confirming operational readiness as the organization moves from the design phase of PPI use is a vital first step for a smooth PPI implementation.

## 1. Review dedication to poverty reduction.

- ▶ How does the organization plan to use the PPI? What are its goals?
- ▶ Is serving the poor written into the mission, objectives or purpose?
- ▶ Are there clearly defined social goals that include poverty outreach?
- ▶ Is there a board member or senior official in charge of or championing poverty outreach?
- ▶ Does the board or senior management require formal social performance reporting?
- ▶ Do funders or stakeholders support work in social performance or social impact?

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## 2. Review the current operational structure as it relates to PPI data collection.

- ▶ Identify the number of:
  - Geographic regions of operation.
  - Clients or customers currently served and an estimate of future outreach.
  - Staff available to assist with PPI implementation.
- ▶ Study the organization chart and highlight key decision makers that need to receive regular updates of PPI implementation. Focus on those who can address implementation issues.
- ▶ Obtain upcoming dates for board meetings and work with senior management to include the PPI on meeting agendas as appropriate.

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### 3. Review the process for collecting PPI data to ensure a smooth, coordinated flow with existing processes that your organization has in place for staff-client interactions.

► Address these questions in the review:

- Is there a person or unit that would regularly provide PPI trainings?
- Do staff visit the clients' homes during the product or service lifecycle? If not, what is the level of interaction or engagement with clients?
- Does the organization conduct regular, e.g., semi-monthly or annual data collection of its clients?
- Is data already collected for the purpose of measuring poverty outreach?
- What is the quality control or internal audit process? How often is it conducted and by whom?
- Are the findings from the audit or quality control reported to senior management?
- Is there a process map for the existing staff-client interaction at each point in the product or service lifecycle? If so, use the map during your review. If not, write down a short description of the process. Pay particular attention to any challenges or opportunities that existing processes may present to PPI data collection and quality control.

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### 4. Maximize opportunities to adapt PPI implementation to existing operational processes that staff and clients may already be familiar with.

- Use existing written procedures as appropriate to help plan PPI implementation. Review the organization's formal documentation procedures on how the organization:
- Develops, pilots, and launches products and services for its target clients; and
  - Manages the impact of introducing new products and services on the organization itself (e.g., human resources, corporate culture).

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### 5. Review the information technology needs and requirements that are specifically related to PPI data collection, processing, analysis, and reporting.

- ▶ Address these questions in your review:
  - What type of management information system (MIS) does the organization use?
  - Is the MIS software easily customizable to include new variables?
  - Does the organization have a system in place to secure its data?
  - Is there a dedicated person or staff performing data entry? How often?
  - What are the regular reports that are created and used by the organization to track its performance? How often are these reports generated? By whom? List the reports in the implementation plan.
  - Who receives regular operational reports?

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### 6. Conduct on-going short training or orientation sessions with appropriate staff on any of the above items.

- ▶ Review an existing operational process (e.g., client-level data collection) to highlight what will and won't change with PPI implementation. For any changes, discuss the reasons why.
- ▶ If you are using Excel as your data analysis software, have one of your staff lead a short "how to" session on PivotTables (see Guide to Using PivotTables in Microsoft® Excel 2007 on [www.povertyindex.org](http://www.povertyindex.org)).

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