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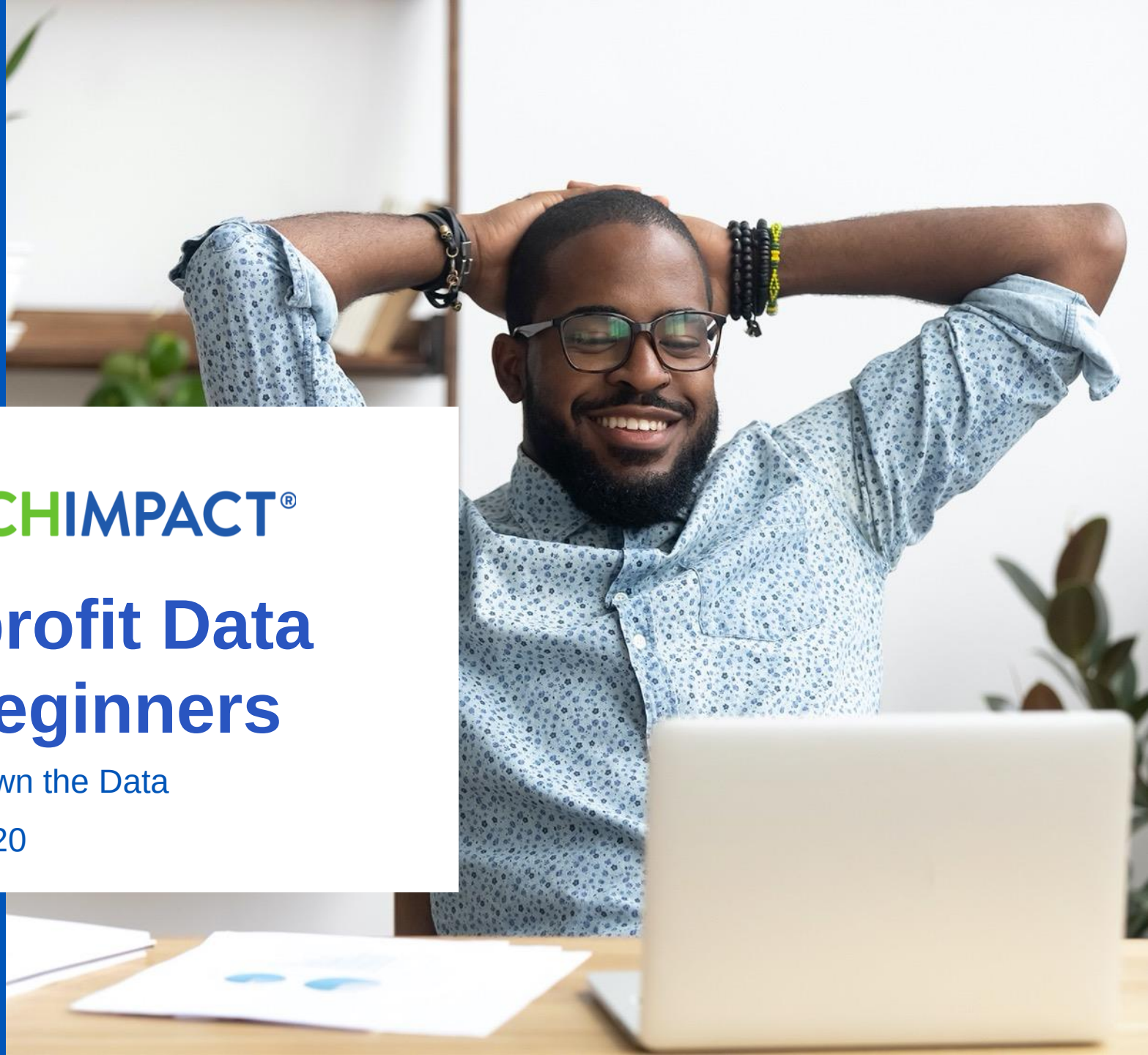
Nonprofit Data for Beginners

Hunting Down the Data

May 14, 2020



ERIC LELAND

Founder and Director of FivePaths

Pronouns: He/His

Eric Leland has spent the last 15 years working with progressive organizations and businesses tackling online and offline technology challenges. Eric is a founding partner of FivePaths (fivepaths.com), a technology firm that brings unparalleled strategic technology consulting, information architecture and web CMS and CRM platform development expertise to each project.

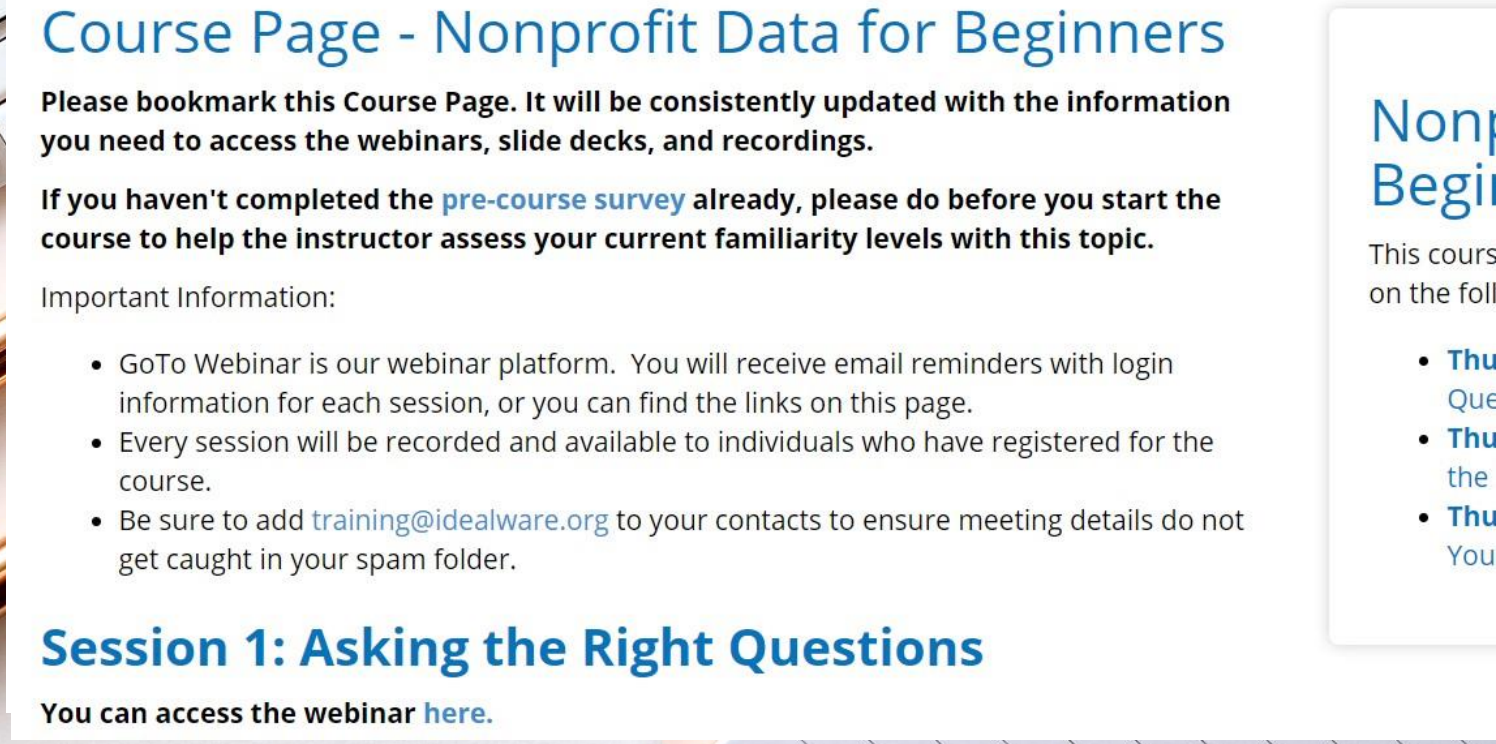
DR. TAJ CARSON

CEO/Founder of Inciter

I work with nonprofits to turn data into valuable and timely information using powerful tools and a flexible framework. I have a Master's degree in Information Visualization from the Maryland Institute College of Art, a certificate in technology entrepreneurship from the University of Maryland-Baltimore County, and a Ph.D. in Sociology from the University of Delaware.

Course Page:

https://offers.techimpact.org/course-page-nonprofit-data-beginners



Course Page - Nonprofit Data for Beginners

Please bookmark this Course Page. It will be consistently updated with the information you need to access the webinars, slide decks, and recordings.

If you haven't completed the pre-course survey already, please do before you start the course to help the instructor assess your current familiarity levels with this topic.

Important Information:

- GoTo Webinar is our webinar platform. You will receive email reminders with login information for each session, or you can find the links on this page.
- Every session will be recorded and available to individuals who have registered for the course.
- Be sure to add training@idealware.org to your contacts to ensure meeting details do not get caught in your spam folder.

Session 1: Asking the Right Questions

You can access the webinar here.

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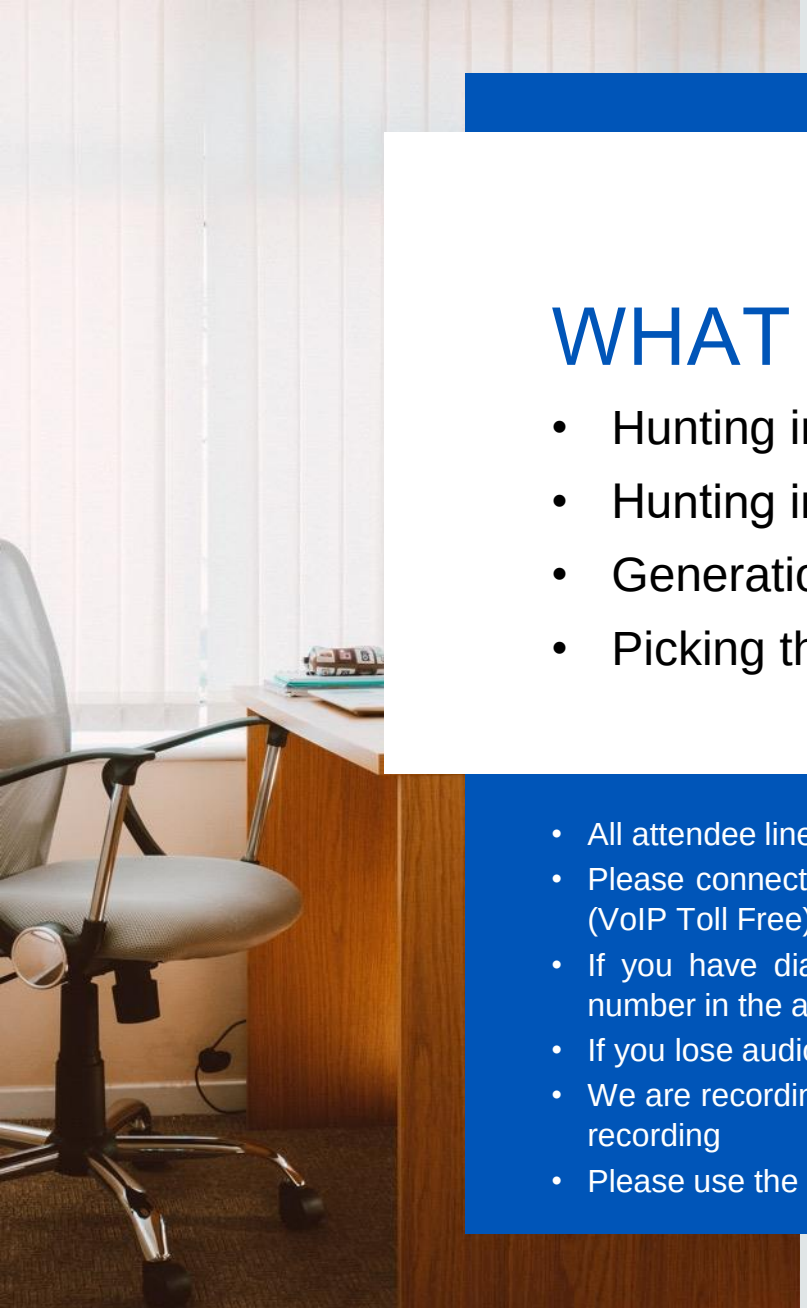

WHAT WE'LL COVER TODAY:

- Hunting in Your Existing Data
- Hunting in Other People's Data
- Generation of Data
- Picking the Right Metrics for You

- All attendee lines will remain muted
- Please connect to audio by dialing in (toll) or by using your computer speakers (VoIP Toll Free).
- If you have dialed in by phone select Telephone and enter your audio PIN number in the audio panel
- If you lose audio, please exit out of the presentation and reconnect
- We are recording today's presentation and you will be sent a link to the webinar recording
- Please use the "Chat Tab" to ask us questions.

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POLL

How much useful data do you already have?

a. A lot of data

b. Some data

c. Very little data

d. I don’t know how much data we have

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DATA IS ALL AROUND YOU

WHAT DO WE MEAN BY DATA?

Data is any observable fact about the world or people, including preferences or subjective perceptions.

YOU NEED DATA TO INFORM YOUR PROGRAMS

For example:

- How many meals were served in a soup kitchen?
- How many students graduated from a program?
- Who showed up for your performance?

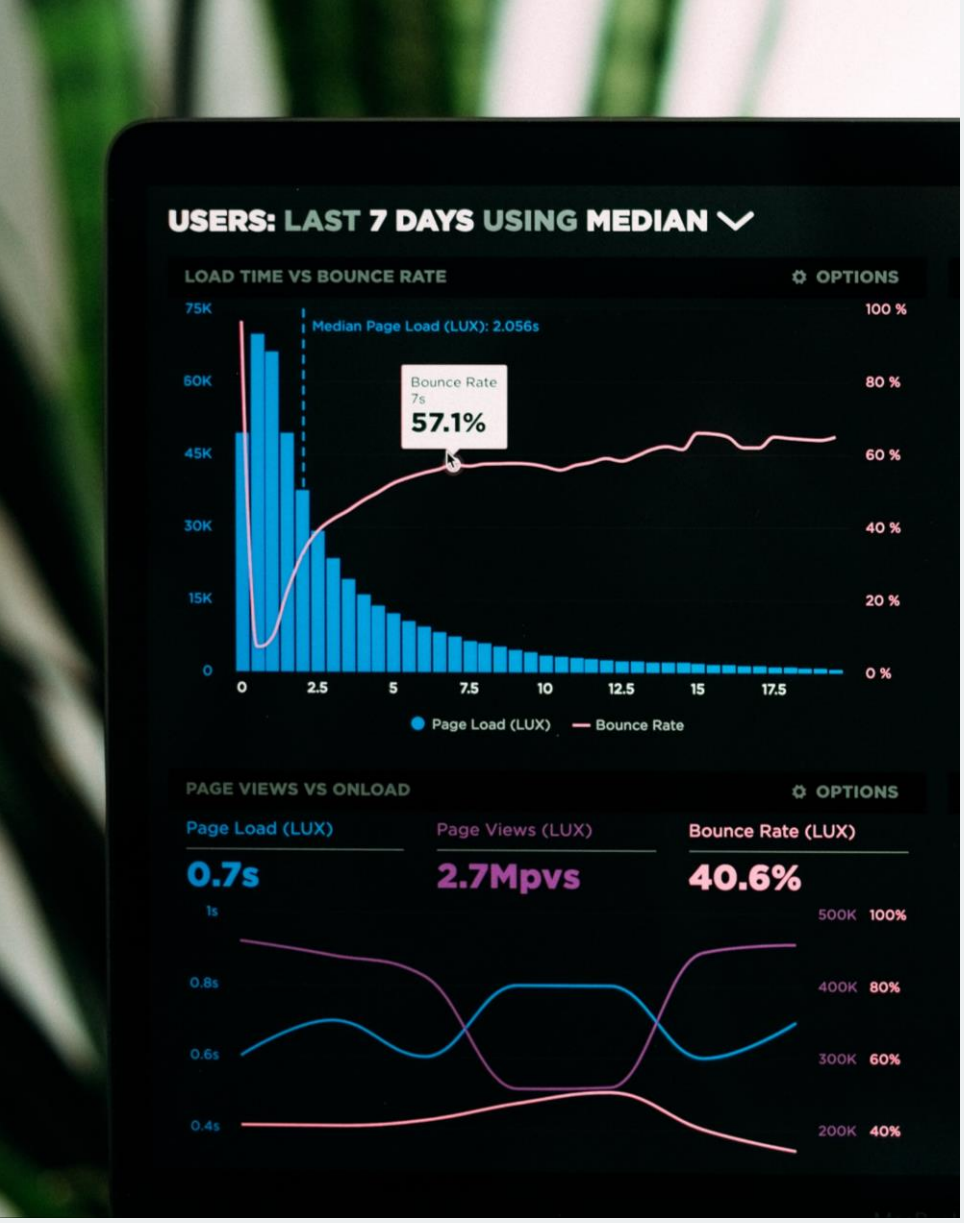
BUT FINDING IT ISN'T ALWAYS STRAIGHTFORWARD

Most organizations have multi-layered missions with relevant data spread out in different places.

THE GOOD NEWS

You’re likely already collecting a lot of useful information. You just have to find it.

HUNTING IN YOUR EXISTING DATA



TWO DIFFERENT TYPES OF DATA METRICS

- Organizational Health Metrics
- Program Metrics

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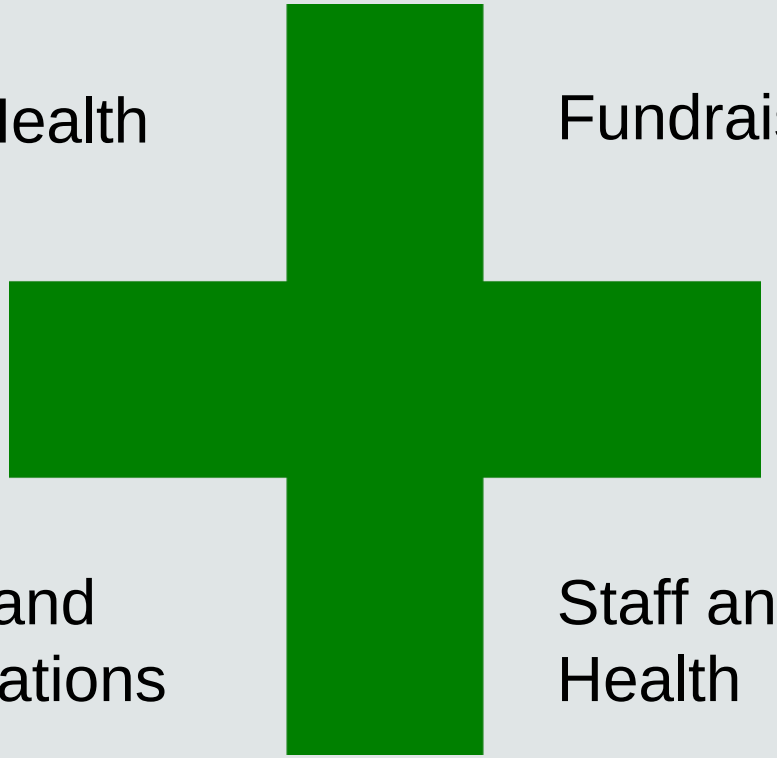
CONSIDER ORGANIZATIONAL HEALTH DATA

Financial Health

Fundraising Health



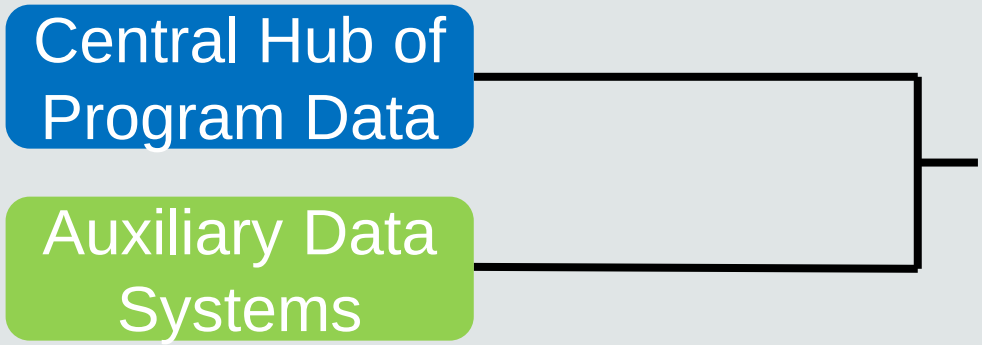
Marketing and Communications Health

Staff and Board Health

WHERE DO YOU FIND ORGANIZATIONAL HEALTH DATA?

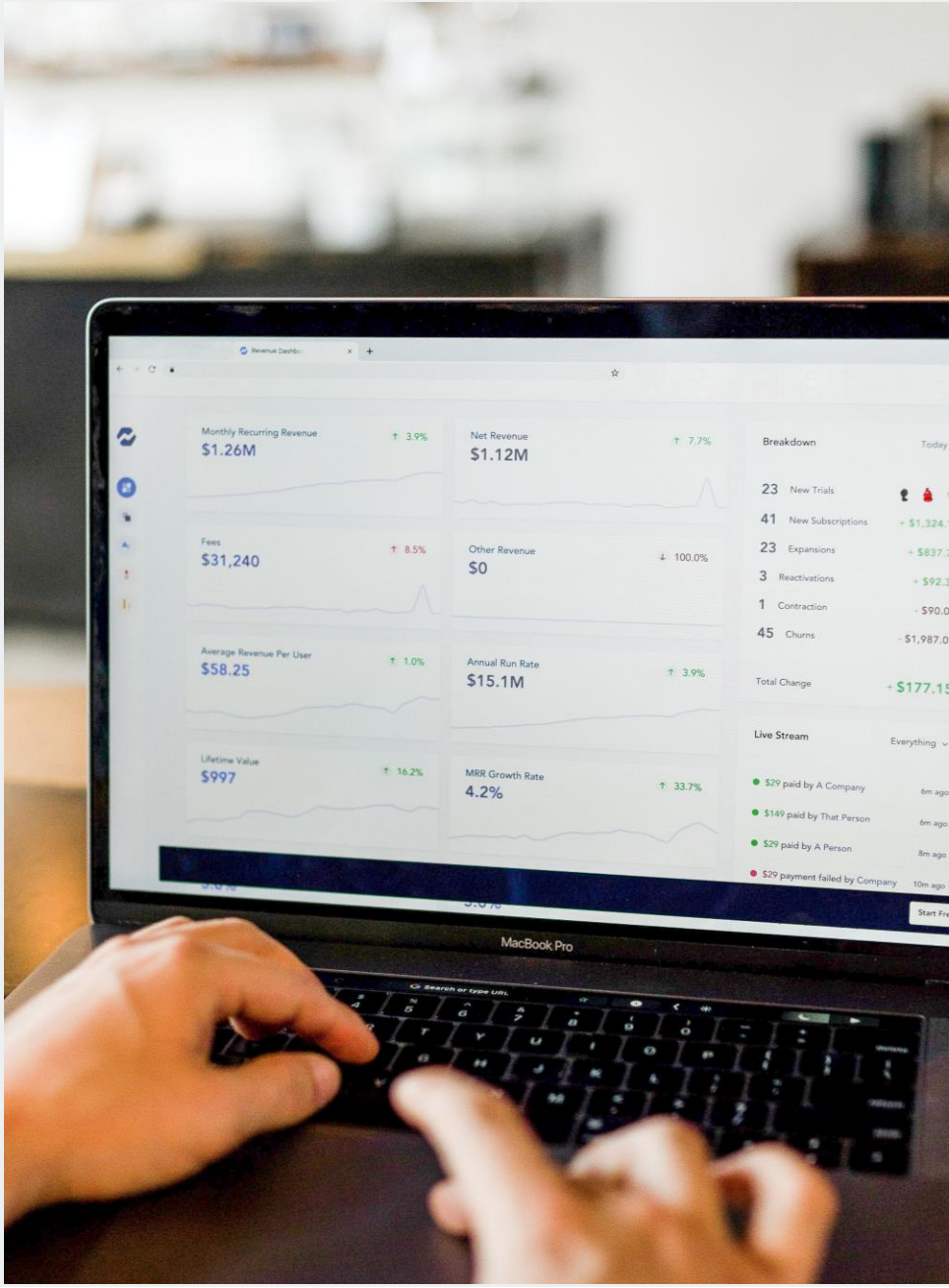
Finances	→	Accounting systems
Fundraising	→	Donor database and accounting
Marketing and communications	→	Online systems, Google Analytics, etc.
Staff/board health	→	Human resources system, board governance work

WHERE DO YOU FIND PROGRAM DATA?



WHERE DO YOU FIND PROGRAM DATA?

Track and report on the majority of your data in one place.



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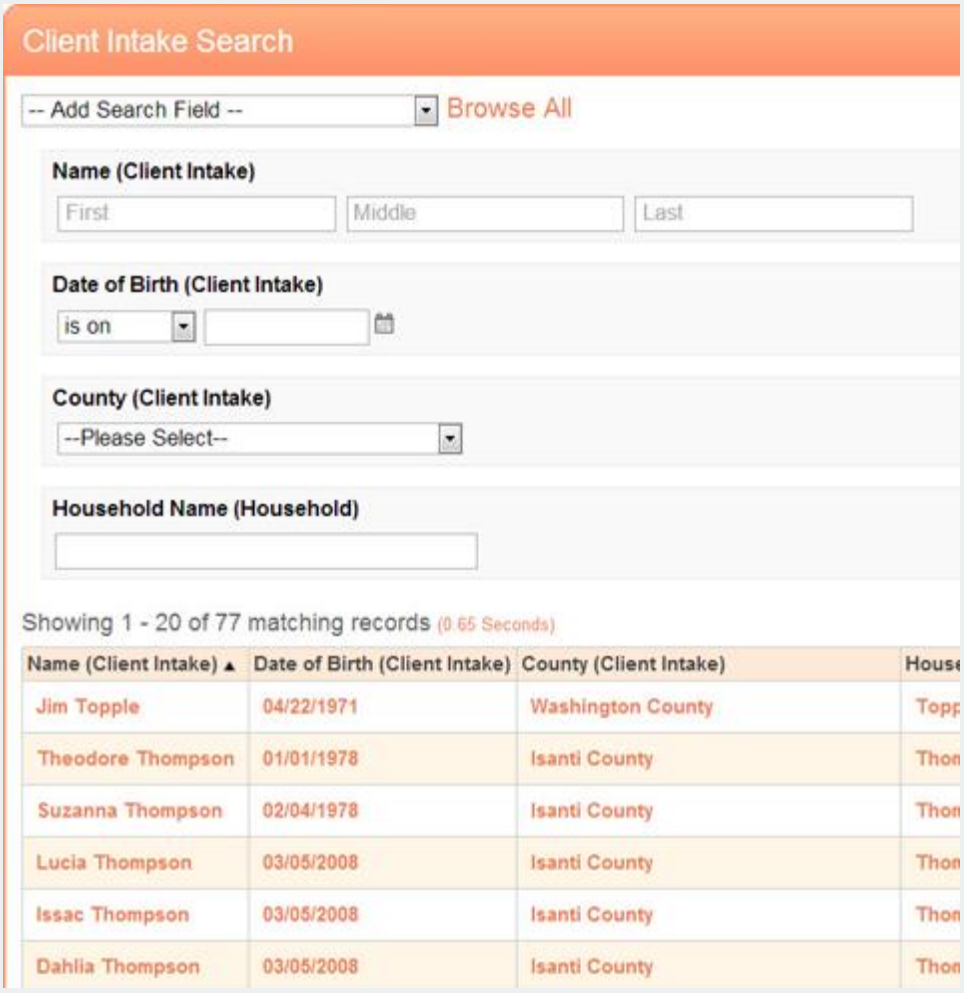
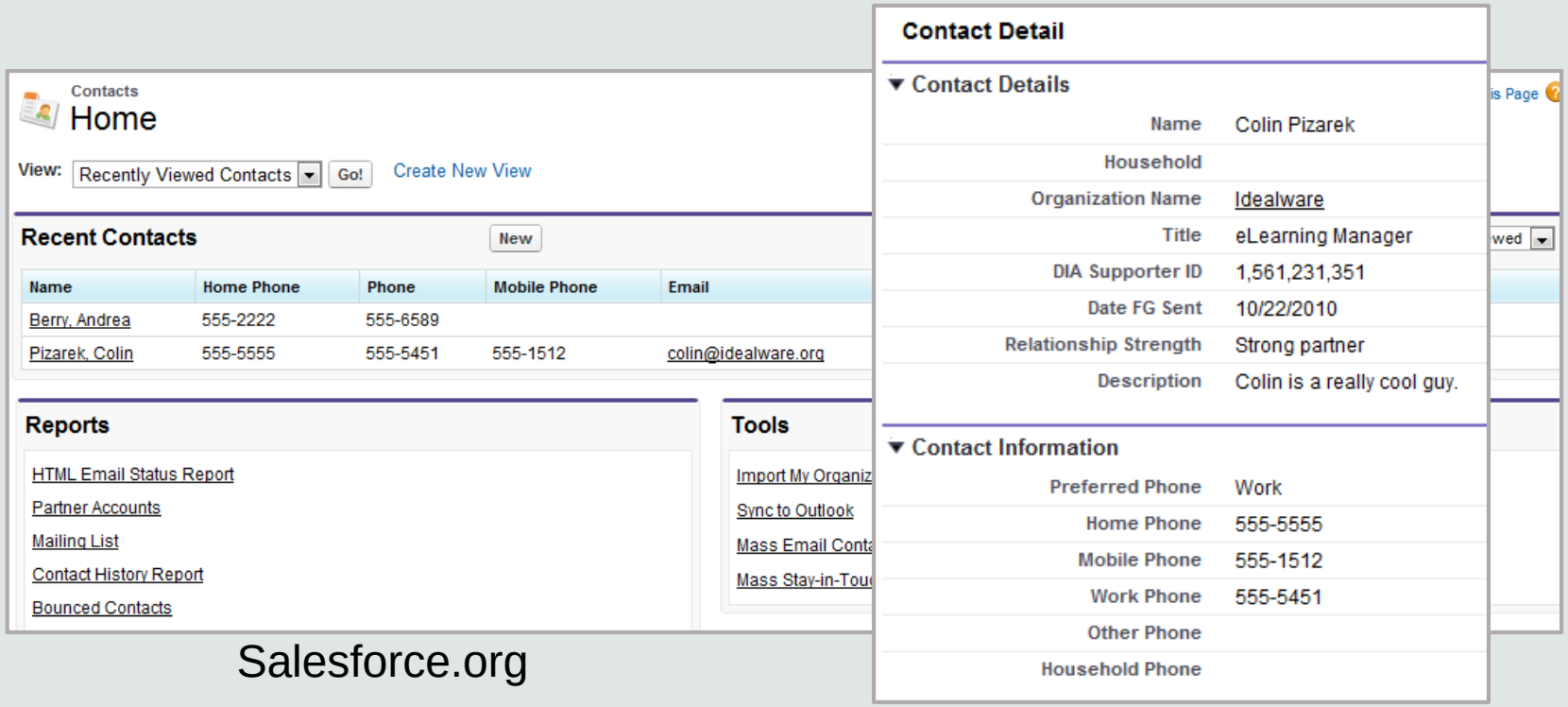
CLIENT/CASE MANAGEMENT



Track data related to specific clients. Some organizations, such as afterschool programs or homeless shelters, may have custom solutions.

CONSTITUENT RELATIONSHIP MANAGEMENT

Track data on several different types of constituents in one place.



Salesforce.org

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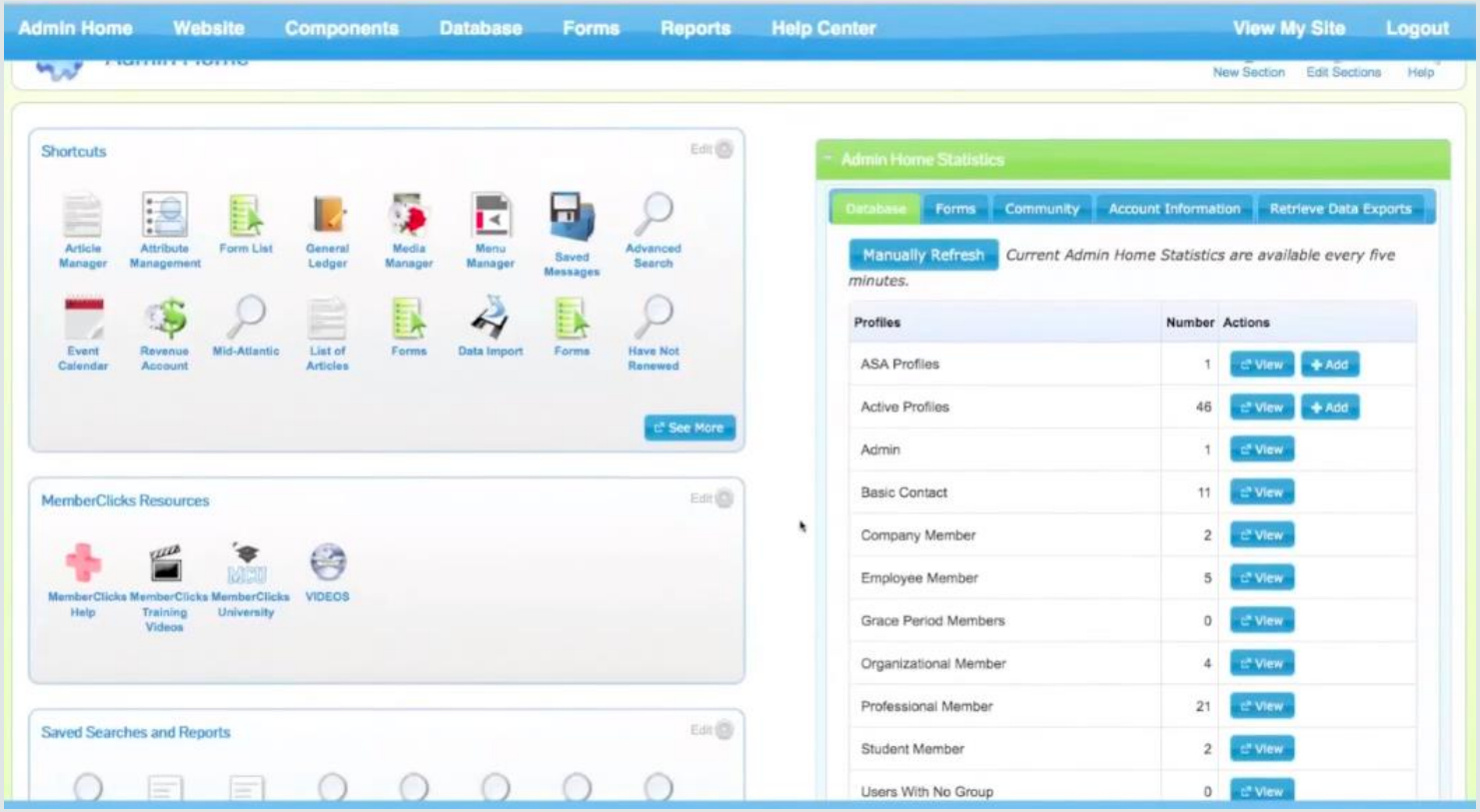
MEMBERSHIP MANAGEMENT

Generally synonymous with association management, membership management systems track organizations and individuals as members.



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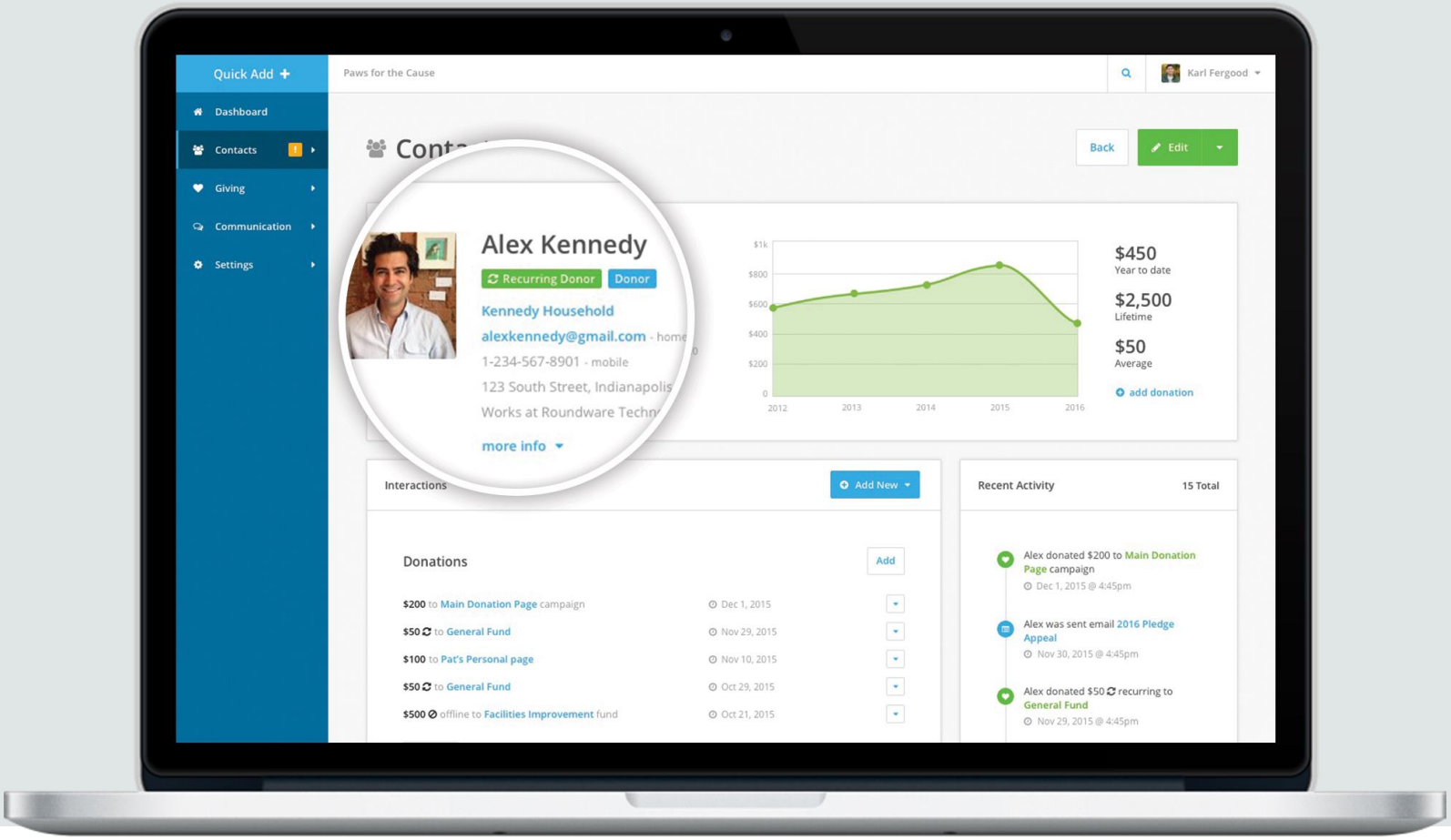
DONOR MANAGEMENT

Track information specifically about donors and fundraising.



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SPECIALIZED CENTRAL HUB SYSTEMS

Library and Collection Management Systems, Legal Case Management Systems, Student Information Systems, and more.

SchoolWorks

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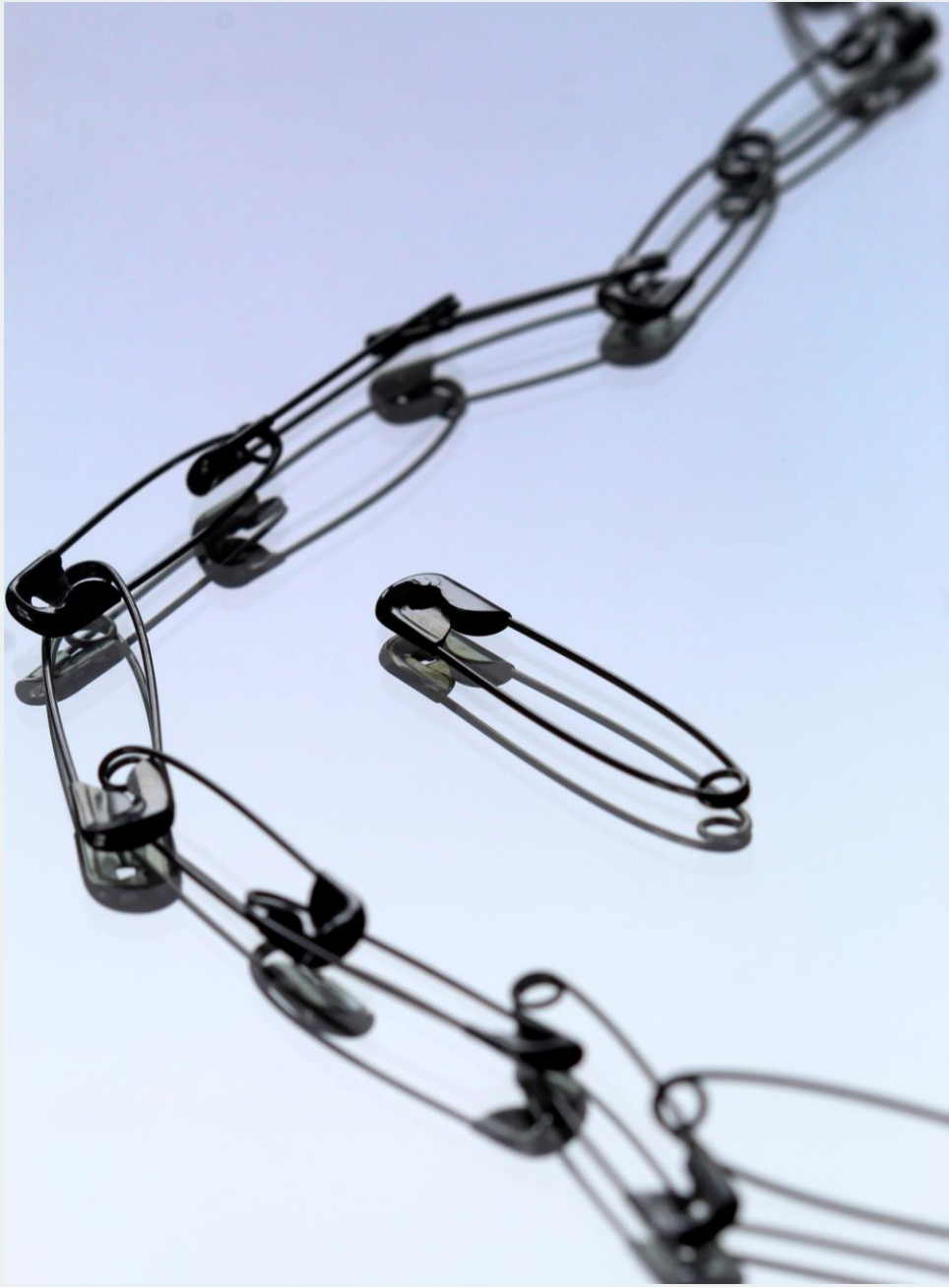
AUXILIARY DATA SYSTEMS

While it's almost always preferable to store all your program data together, there are certain instances where data is too different to store in your central hub.



FOR INSTANCE

- Volunteer Management
- Visitor Management
- Event Registration
- Learning Management
- Electronic Medical Records
- Scientific Data Monitoring

SPREADSHEETS OR CUSTOM SYSTEMS

It’s likely that you have some important data in spreadsheets or custom systems.

Don’t discount these as important sources of data.

Earned			Used		
Sick and Personal Days	Vacation Days	Comp Time	Sick and Personal Days	Vacation Days	Comp Time
				Roll Over Balance:	
15	10				
0	0		0.1		
0	0		1	2	
0	0				
0	0		0.9	1	
0	0				
0	0				
0	0				
0	0				
0	0				
0	0				
0	0				

TWO DIFFERENT TYPES OF PROGRAM METRICS

Some data systems will include data of relevance to both categories, so don’t discount administrative systems when thinking about program data.

Organizational Health Metrics

Program Metrics

YOUR ADMINISTRATIVE SYSTEMS

- Count emails.
- Count appointments or meetings.
- Report from your finance system.

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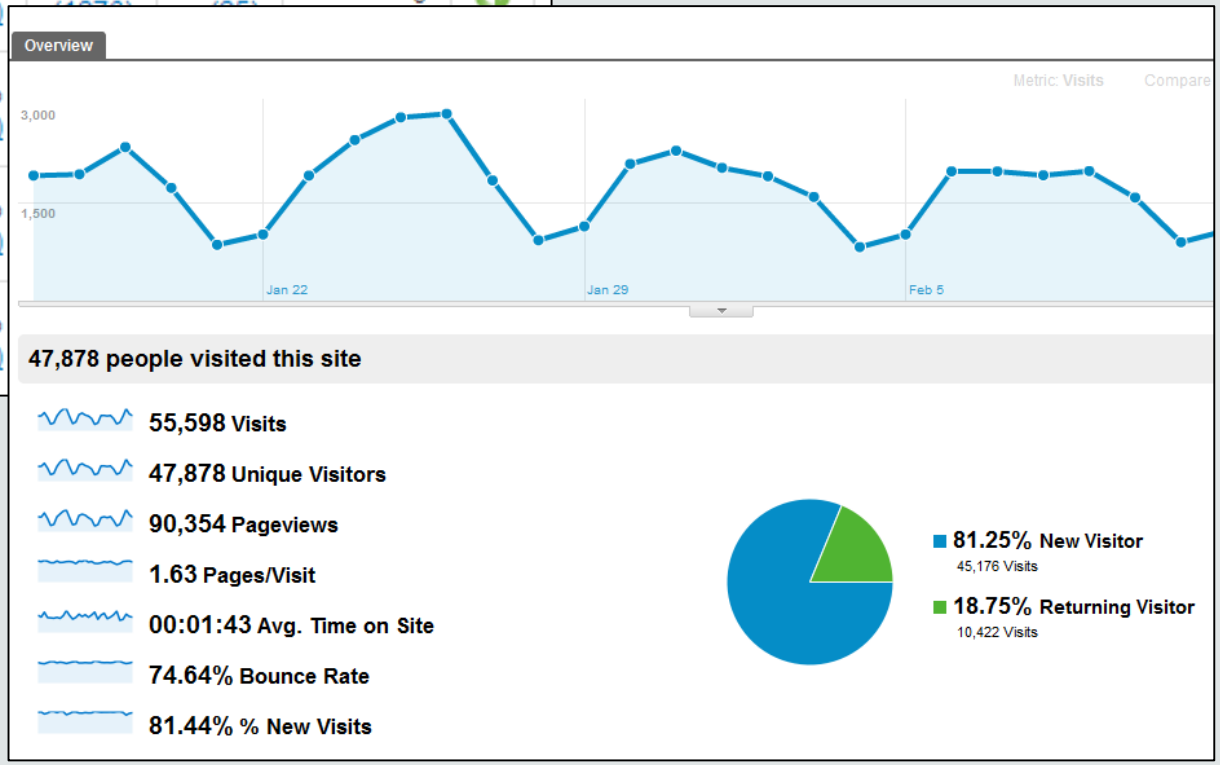
WEB OR EMAIL ANALYTICS

Sent	Bounces	Spam Reports	Opt-outs	Opens	Clicks	Forwards	
4583	29.9% (1371)	0	0.1% (3)	27.3% (878)	3.3% (29)	0	
4589	29.9% (1371)	0	0.1% (6)	39.7%	2.0%	0	
4590	30.2% (1388)	0	0.0% (2)				
4585	30.1% (1378)	0	0.2% (9)				
4581	30.2% (1383)	0	0.1% (4)				



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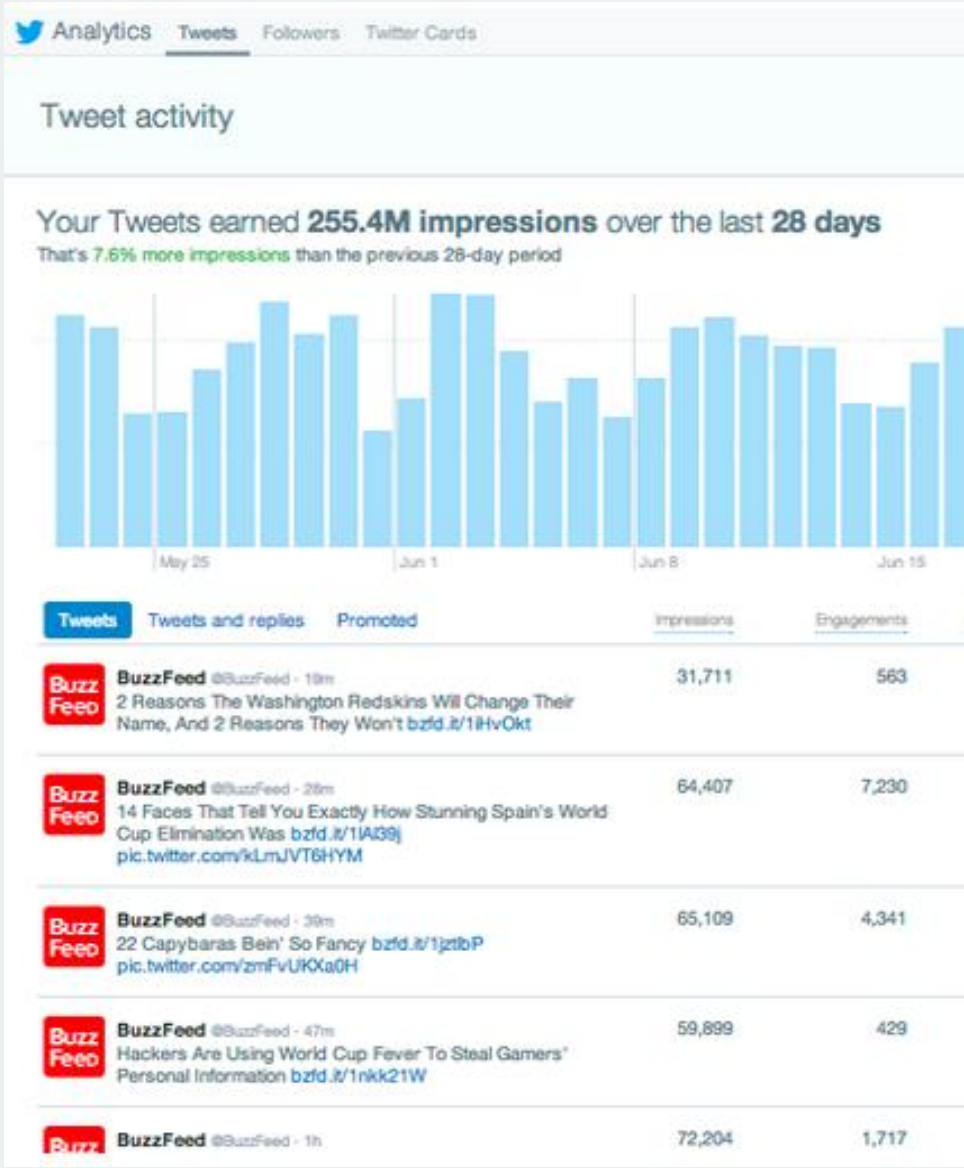
SOCIAL MEDIA CHANNELS

See who’s looking at and interacting with your organization on social media.



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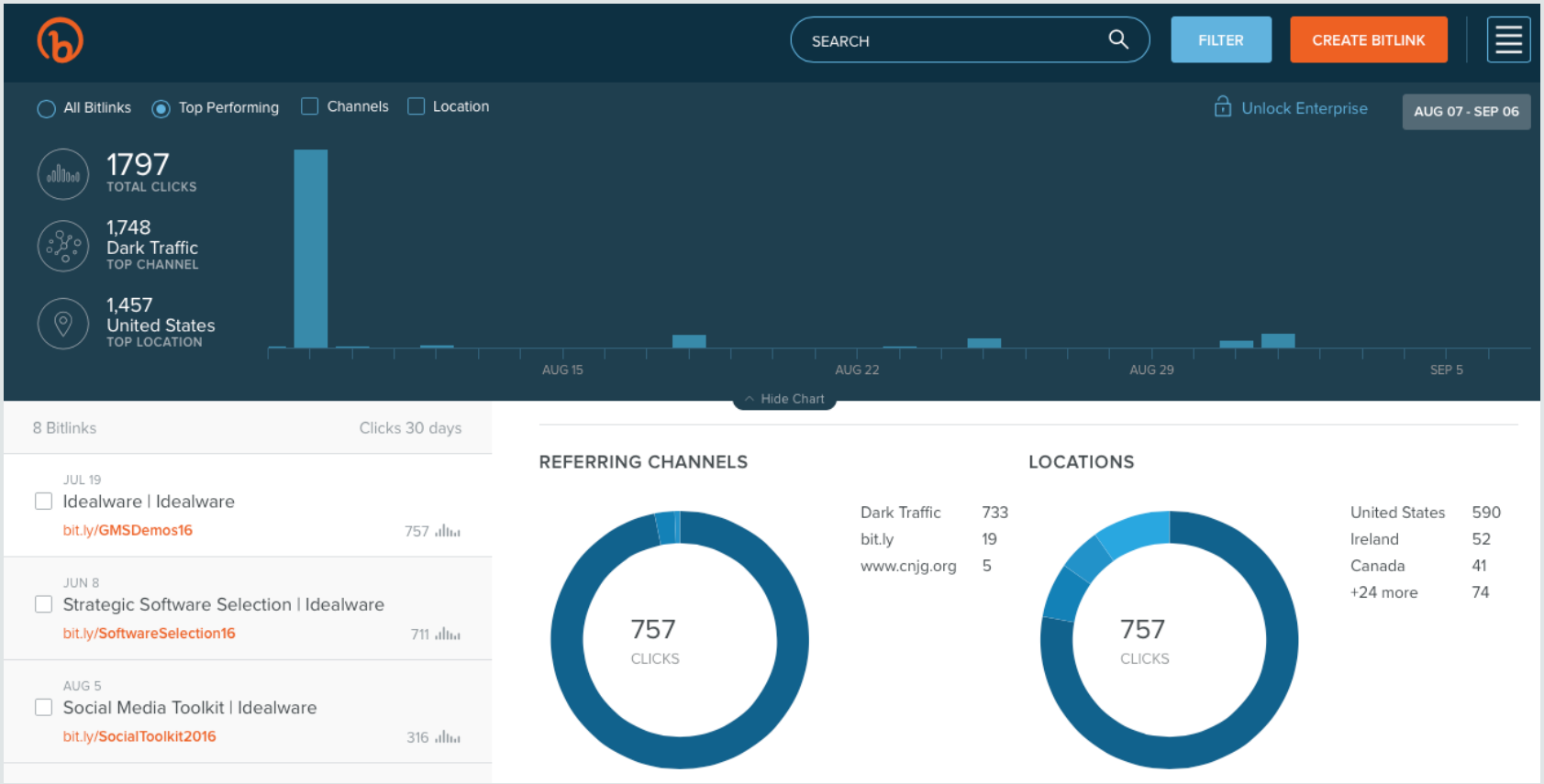
SHORTENED LINKS

Track embedded links across all social media channels.



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YOU MAY NEED TO COUNT!

For example:

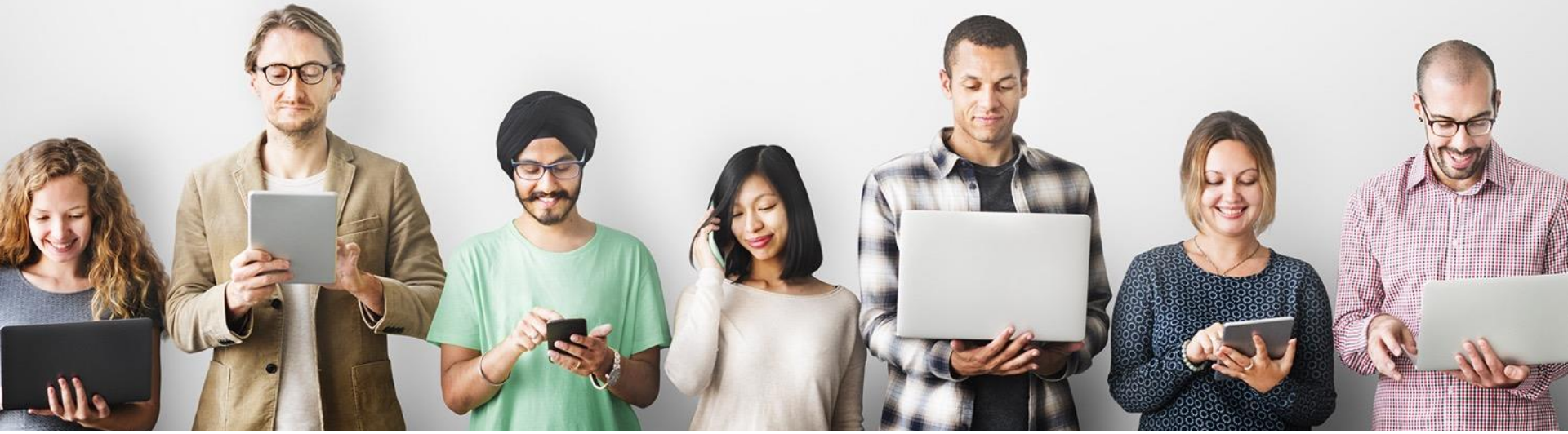
Posts by you vs. posts by your community on your wall.

CREATE A GUIDE TO YOUR EXISTING DATA

- What are your existing data sources?
- What are the basic types of data in each?

INTO THE CHAT

What's the central hub for your program data?



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HUNTING IN OTHER PEOPLE'S DATA

WHAT ARE SOURCES OF PUBLIC DATA?

Brainstorm some answers in the question box.

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PARTNER DATA

M+R Benchmarks 2019

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ACADEMIC DATA

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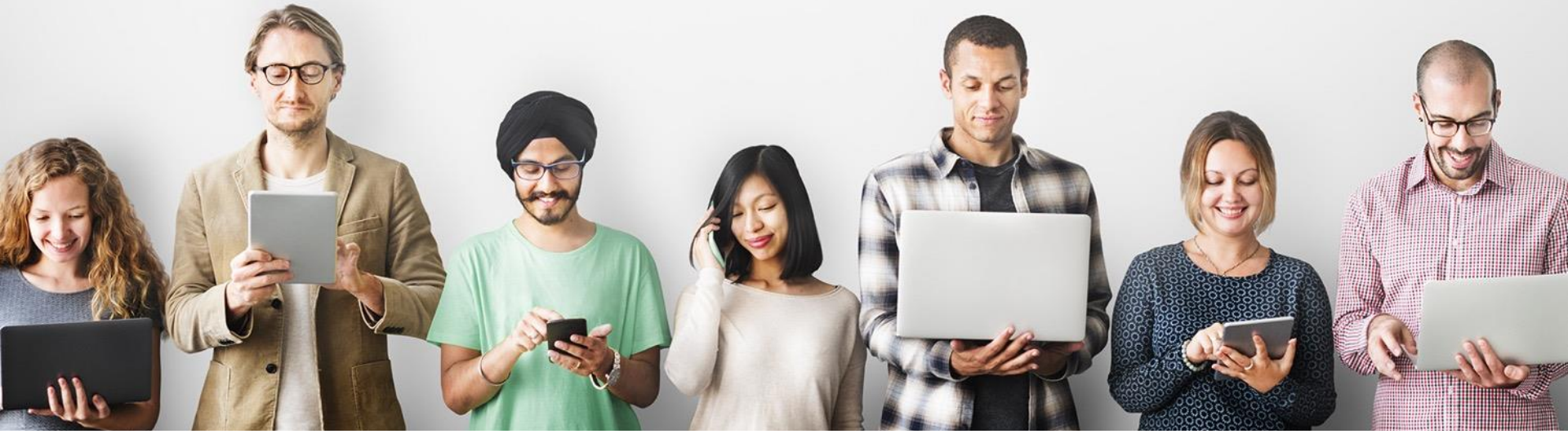
INTO THE CHAT

What opportunities for public data jump out at you?



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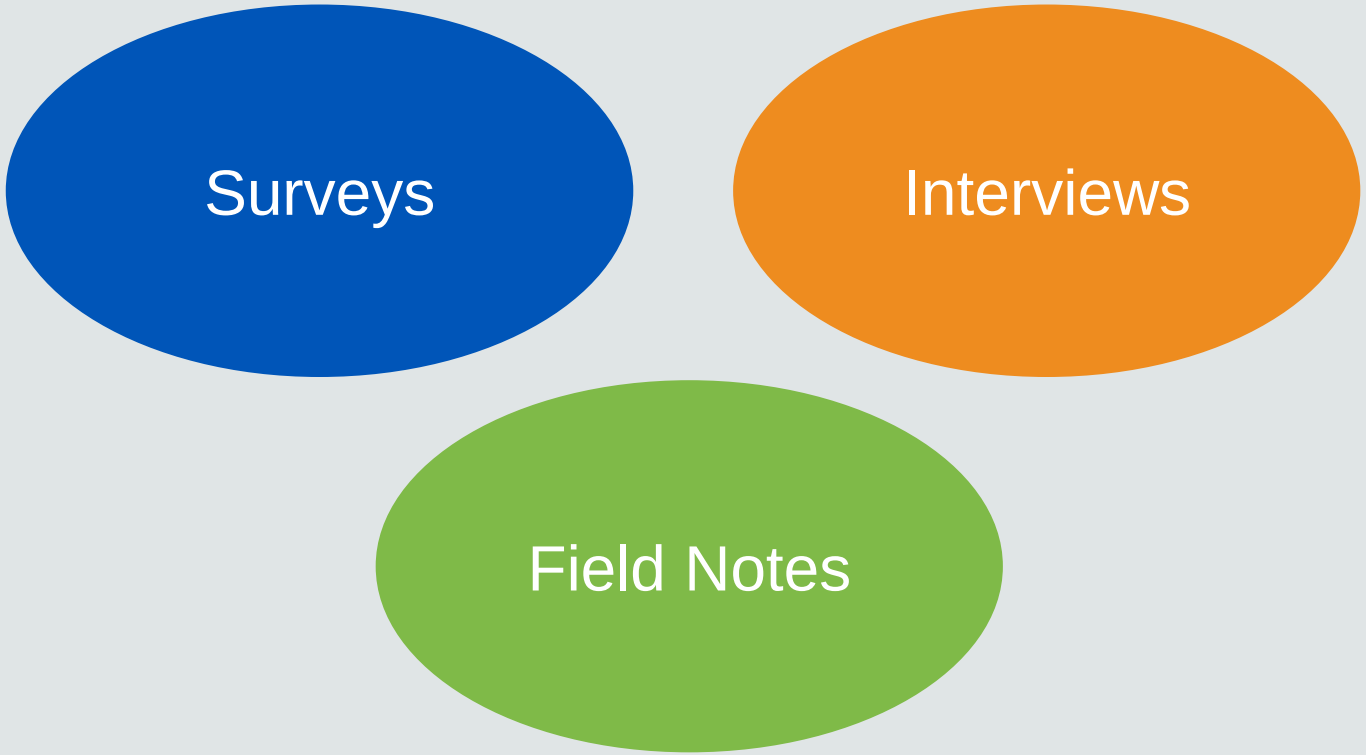
GENERATION OF
DATA

SHOPPING FOR DATA

What can you go out and collect that would add to your program data mix?

THREE CORE WAYS TO COLLECT DATA FROM THE FIELD



THINKING ABOUT SURVEYS

Surveys can help you assess what people think, their satisfaction with your services, or their view of whether your programs helped them.

WHO DO YOU SURVEY?

- Members/Donors
- Constituents
- Program participants or beneficiaries

WRITING AN EFFECTIVE SURVEY

- Keep your goals in mind.
- Keep your questions relevant to the audience.
- Keep it short (5 minutes or less).
- Keep the questions simple and organized.
- Don't ask leading questions.

DO YOU OFFER ANONYMITY?

GET FEEDBACK ON YOUR SURVEY

- Pilot your survey with a few people before you launch it.
- Do they find any question unclear?
- Assume you'll go through several drafts.

WHEN DO YOU SEND YOUR SURVEY?

Ask people to fill out the survey as close to their interaction with you as you can.

ONLINE OR PAPER SURVEY?

Online	Paper
• Data is online—doesn't need to be entered to be analyzed • Quicker to create	• Much easier to get someone physically present to do • Higher response rate—even by mail • Easier to use for less tech-savvy • Doesn't require internet access

SMS SURVEYS

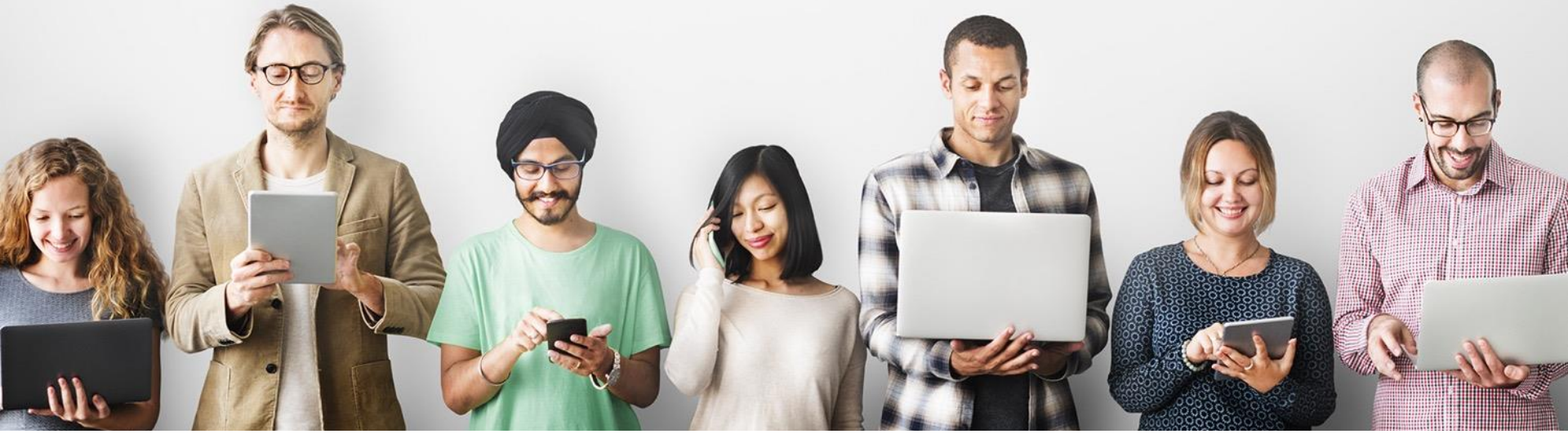
Tools designed to send broadcast texts can set up automated responses with a lot of branch points—for a price.

HOW MANY ARE ENOUGH?

The number of responses, or even the response rate, are not as important as how well the respondents represent what you're measuring.

INTO THE CHAT

Have you done a survey before? What did you learn from the process that will help you with your next survey?



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INTERVIEWS

Interviewing is time intensive, but it can be valuable.

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WHEN SHOULD YOU DO INTERVIEWS?

- When nuance matters.
- When you need to strengthen relationships.
- When you're primarily looking for qualitative data.

GENERATING QUESTIONS

- Keep your goals in mind.
- Keep questions relevant to the audience.
- Keep it to 10 – 20 minutes.
- Keep the questions organized.
- Don’t ask leading questions.

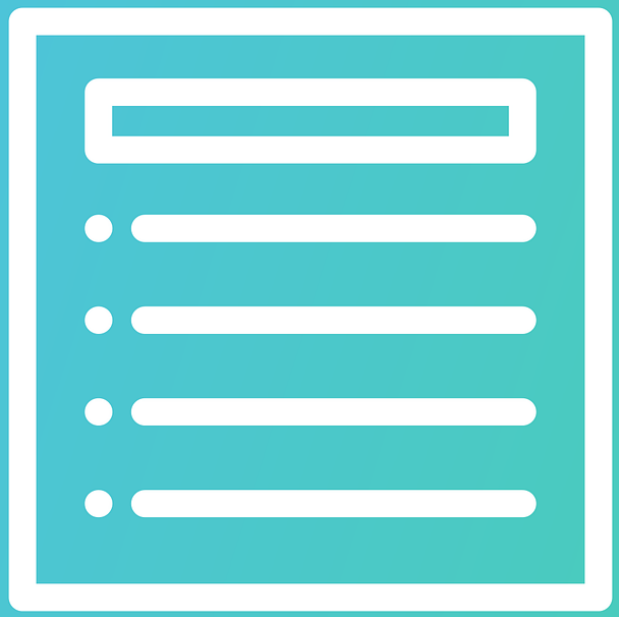
PLANNING THE PROCESS

Recruit 3 – 4 people to roughly match each key demographic.

One interviewee could simply be nuts, but by four people you should start hearing repeated themes.

USE A THIRD PARTY FOR ANONYMOUS SURVEYING

TYPE UP NOTES IN A STANDARDIZED FORMAT

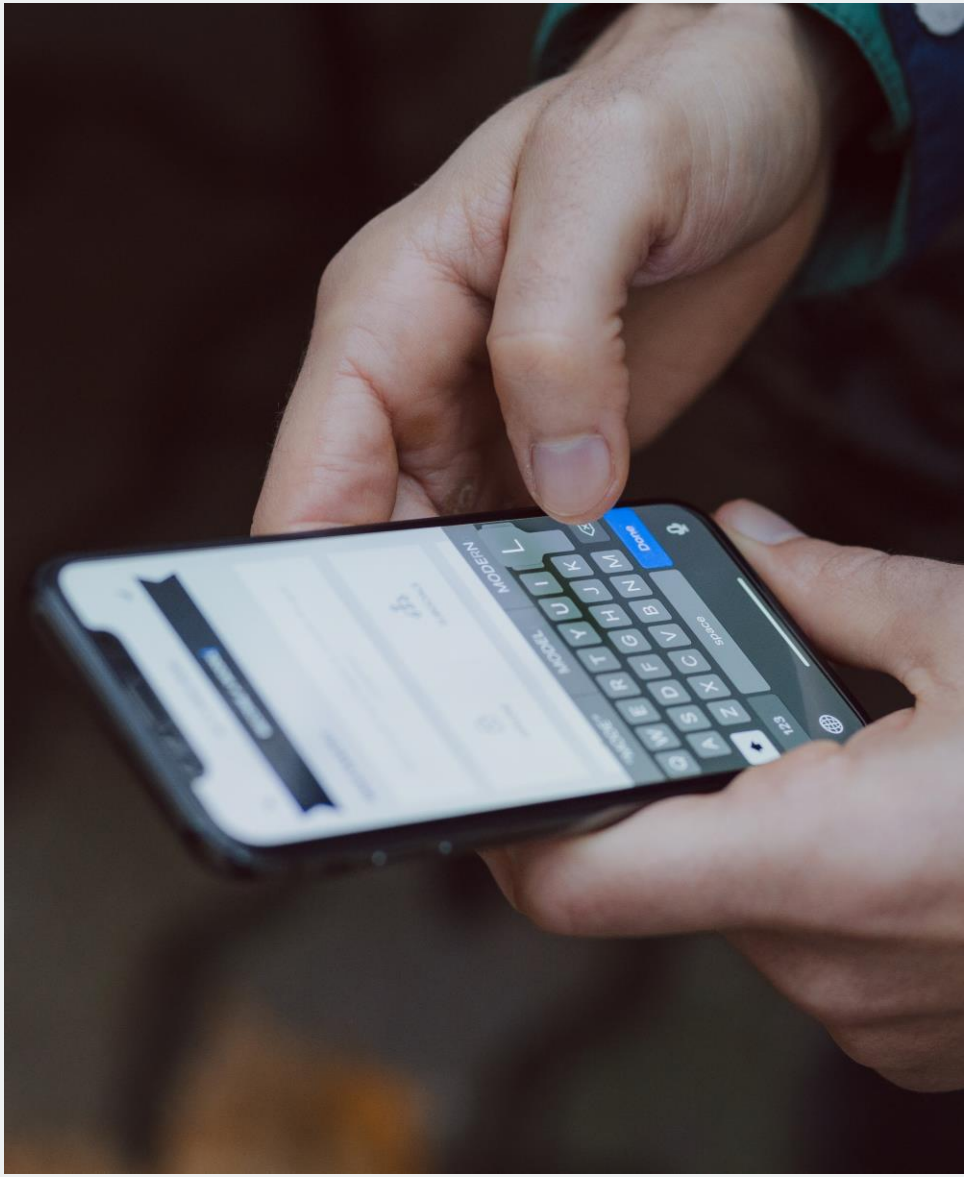


TRANSLATE NOTES INTO INFORMATION

Scanning technologies and word recognition software can help digitize even handwritten notes from an interview.

COLLECTING DATA WITH MOBILE PHONES

Sometimes, you can input interview responses directly using mobile phones.



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NOTES FROM THE FIELD

You can enter factual data about:

- Events (e.g., how many people attended).
- Or the world (e.g., number of pounds of trash collected at a beach cleanup).

LOOK FOR EXISTING WEBSITES OR APPS

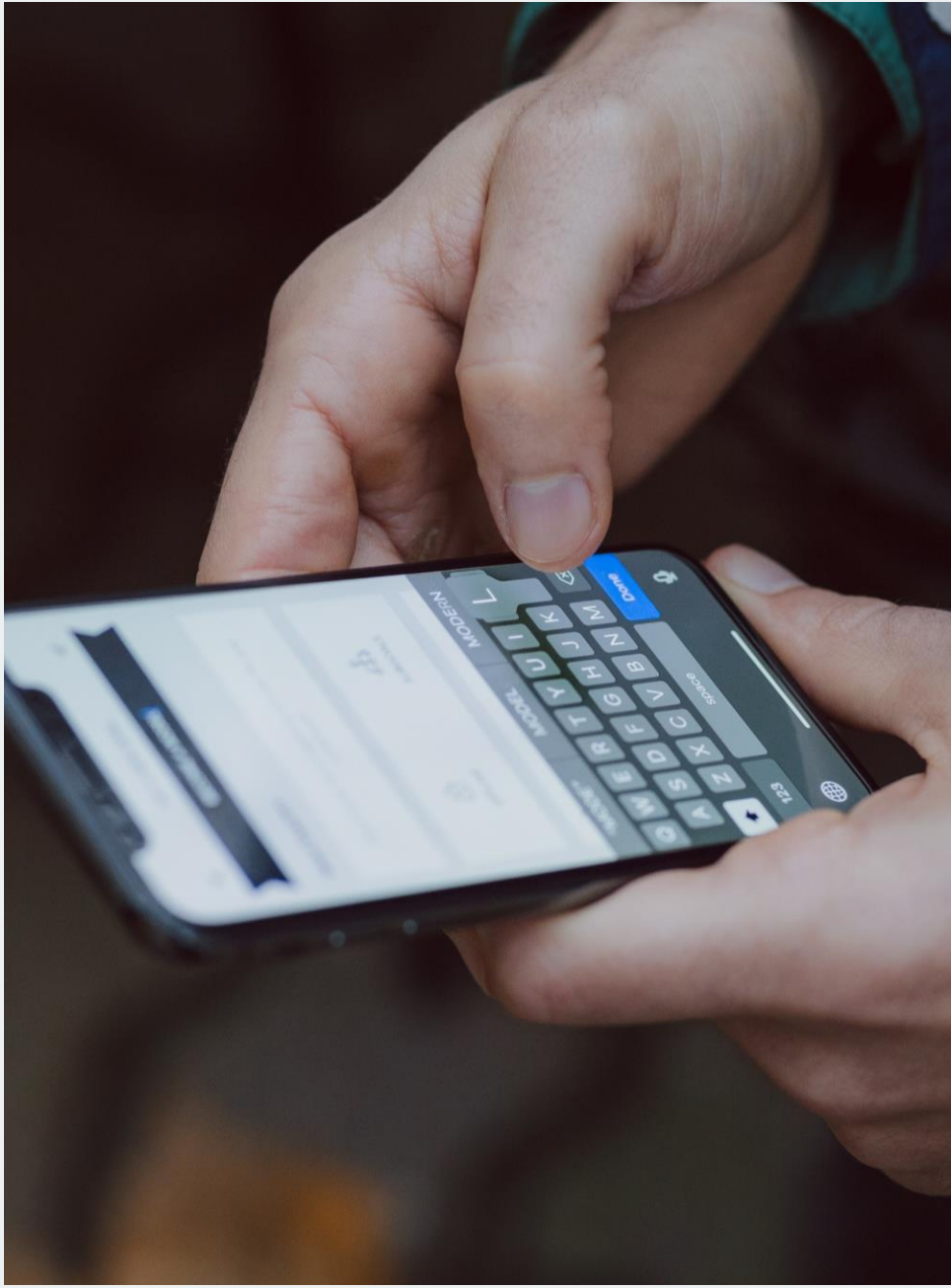
There are a lot of opportunities to repurpose apps for your own needs.

WHO COLLECTS FIELD DATA?

- Staff
- Paid contractors
- Volunteers

COLLECTING VOLUNTEER INFORMATION VIA TEXT OR MOBILE APP

People can report emergencies or incidents via their mobile phones, which can be collected in a database.



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PICKING THE RIGHT METRICS FOR YOU

START WITH WHAT YOU WANT TO ANSWER

What metrics can measure—or provide a proxy for—your fuzzy goal?

Engaging volunteers to **grow** Connecticut's **environmental sector**

ENGAGING VOLUNTEERS

- Track match rate between volunteers and nonprofits over time
- Track number of volunteer hours over time
- Survey volunteer to see how engaged they feel they are

GROW

- Track total income across all target organizations
- Gather how much money they reported raising from individual donors

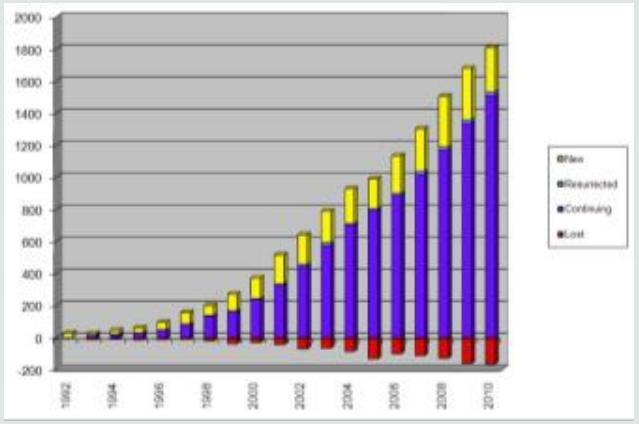
ENVIRONMENTAL SECTOR

- Those in CT who file a 990 reporting themselves as an "environmental" org
- Paid members of our community

WHAT LEVEL OF SOPHISTICATION?

WHAT DATA DO YOU ALREADY COLLECT?

Info on communication reach?



Constituent data?

Total			
Actual	Budget	$ Over Budget	% of Budget
1,371.69	11,100.00	-9,728.31	12.35757%
20,265.00	31,900.00	-11,635.00	63.52665%
21,636.69	**43,000.00**	**-21,363.31**	**50.31788%**
6,000.00	17,500.00	-11,500.00	34.28571%
6,000.00	**17,500.00**	**-11,500.00**	**34.28571%**
10,602.00	18,200.00	-7,598.00	58.25275%
2,285.00	4,050.00	-1,765.00	56.41975%
	8,000.00	-8,000.00	
12,887.00	**30,250.00**	**-17,363.00**	**42.60165%**

Financial data?

WHAT DATA COULD YOU COLLECT?

Strongly Disagree	0.0% (0)
Disagree	0.0% (0)
Agree	**56.0% (14)**
Strongly Agree	44.0% (11)

Survey data?

Form 8283 Noncash Charitable Contributions

Section A—List in this section only items (or groups of similar items) for which you claimed a deduction of $5,000 or less. Also, list certain publicly traded securities even if the deduction is over $5,000 (see instructions).

Part I Information on Donated Property—If you need more space, attach a statement.

Part II Other Information—Complete line 2 if you gave less than an entire interest in property listed in Part I. Complete line 3 if conditions were attached to a contribution listed in Part I.

Public info from your state or county?

Data from the field?

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DON’T WAIT FOR NEW TECHNOLOGY INFRASTRUCTURE

Start with what you can do now and make needed technology improvements over time.

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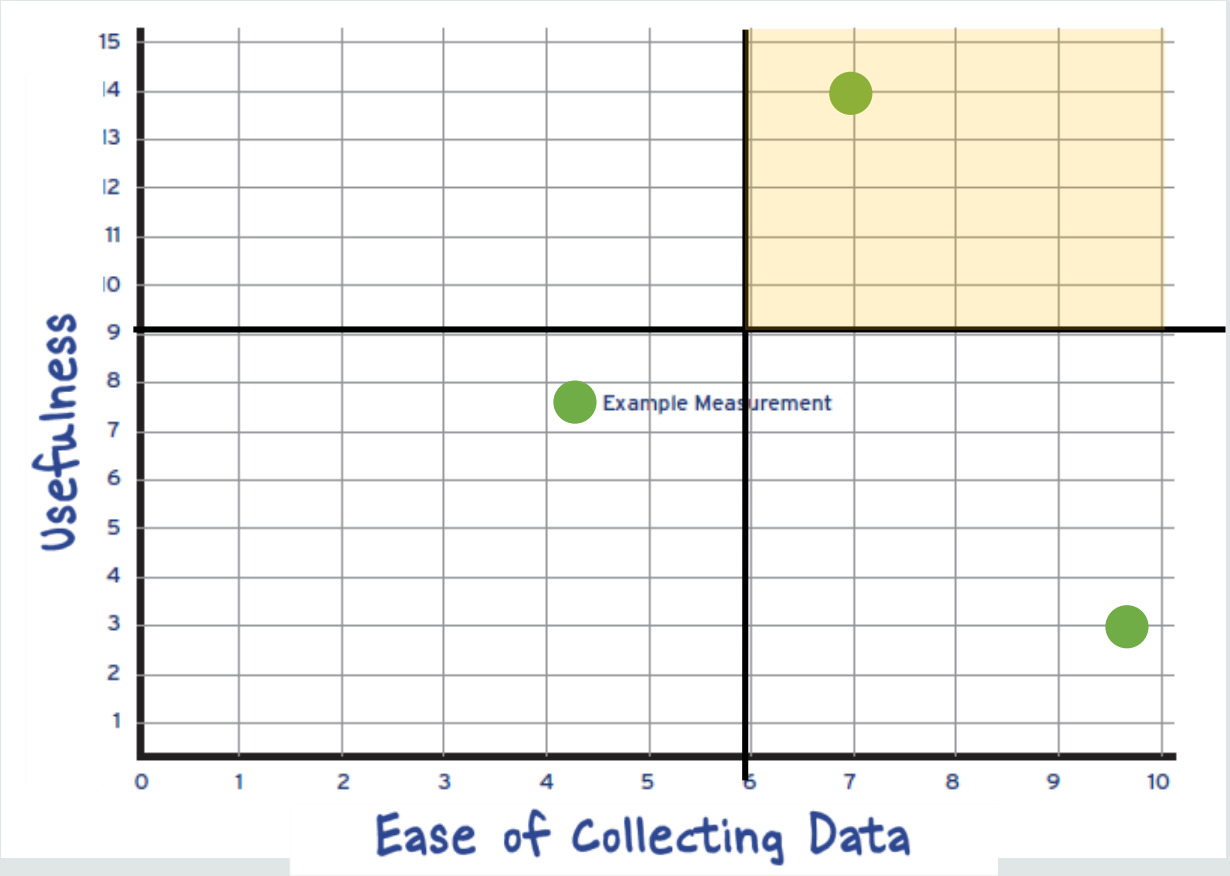
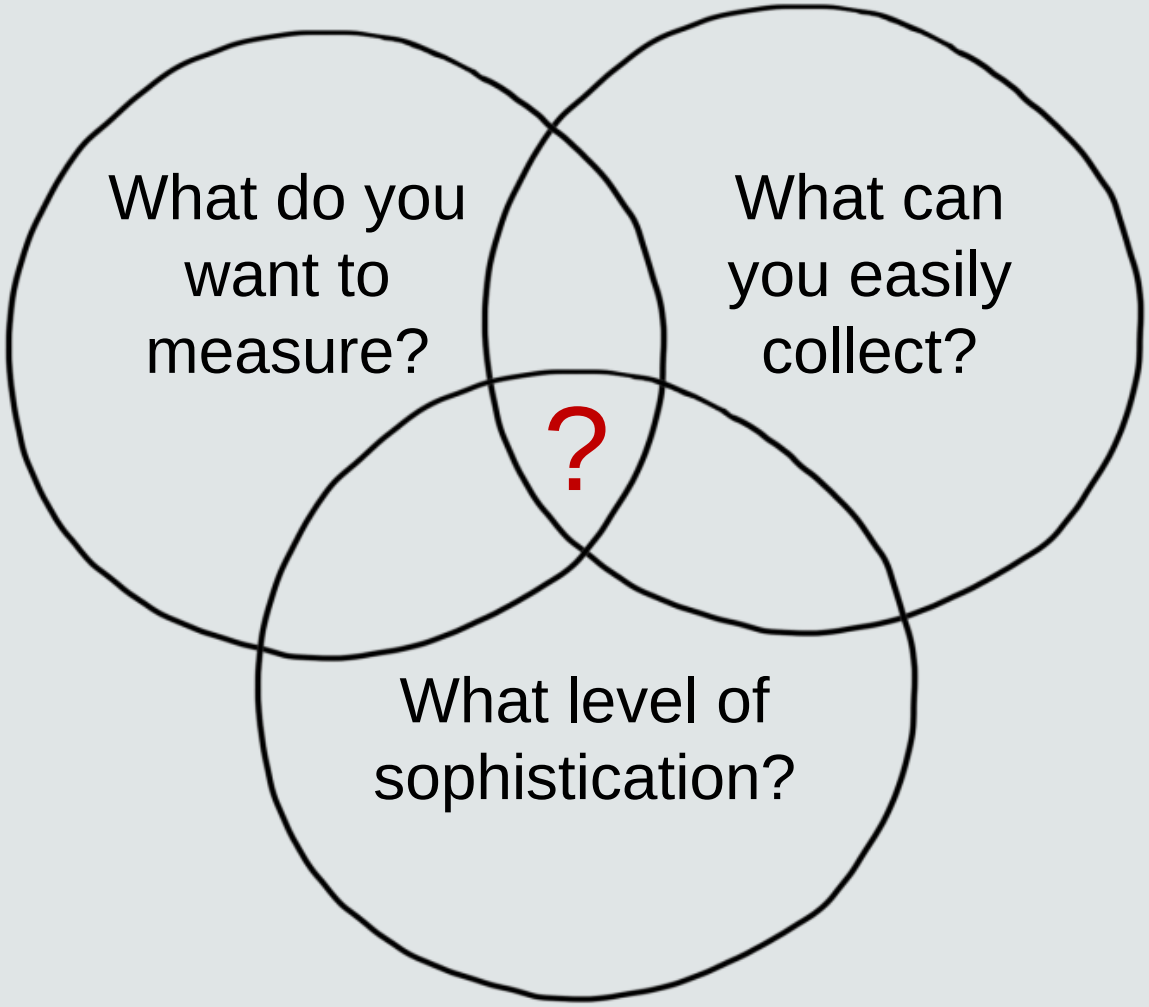
THINK THROUGH THE RIGHT METRICS

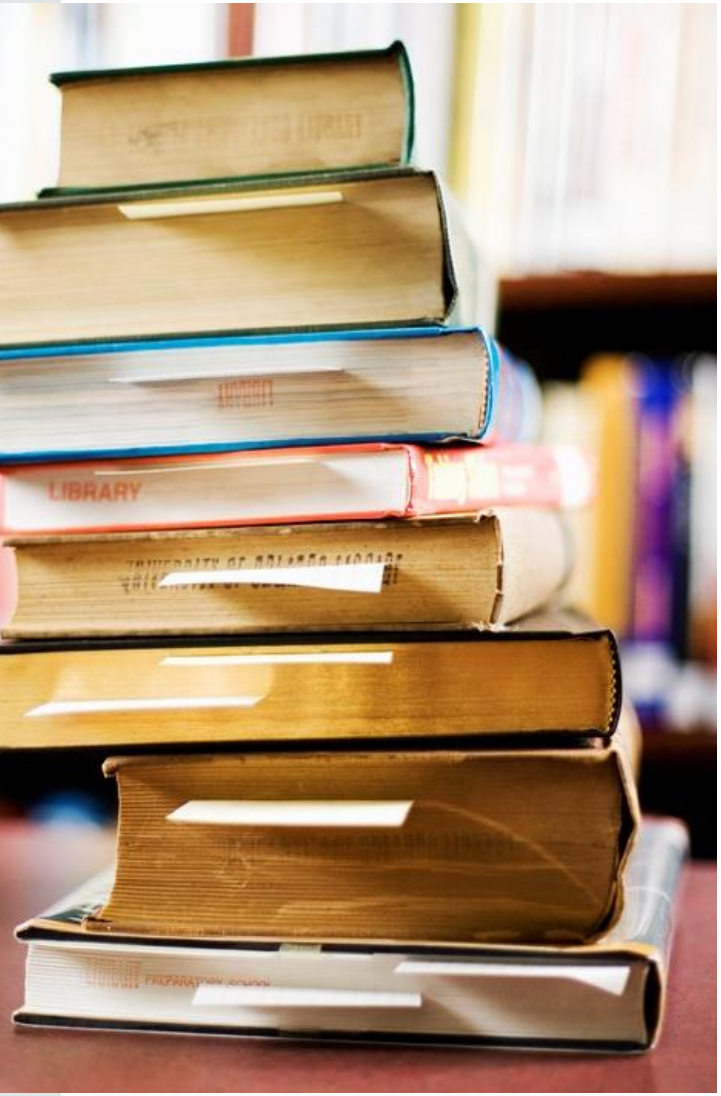


BALANCING THESE FACTORS MAY NOT BE EASY

But it will form an incredibly useful foundation for measuring your mission.

DEFINE ONE OR A COUPLE OF SWEET SPOTS

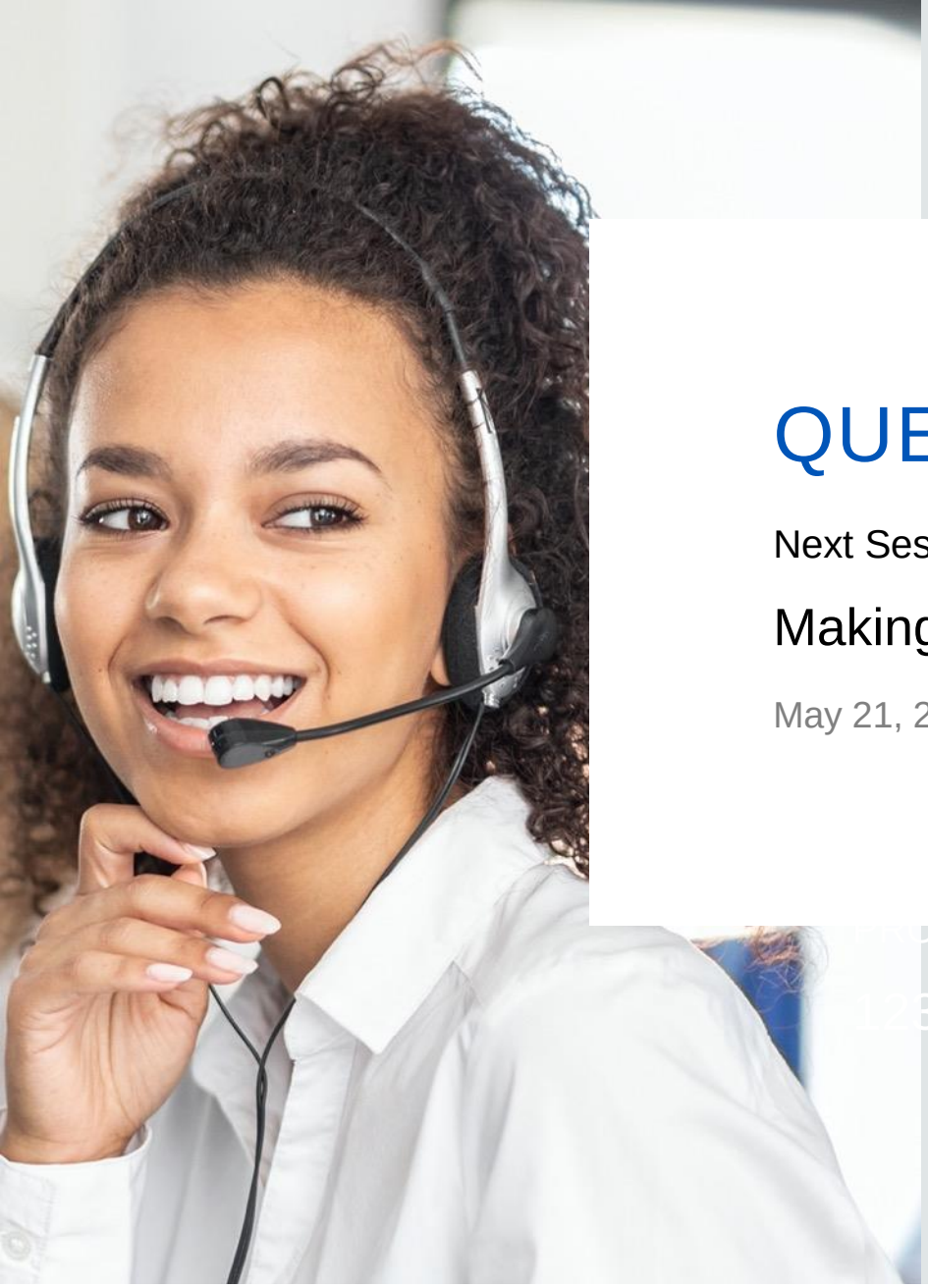




Homework

Think it through:

- What data do you have?
- What could you straightforwardly collect?
- How does it overlap with the desirable proxies and metrics you defined in the last class?



QUESTIONS?

Next Session

Making Use of Your Data

May 21, 2020

PROMO CODE

1234567

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THANK YOU

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