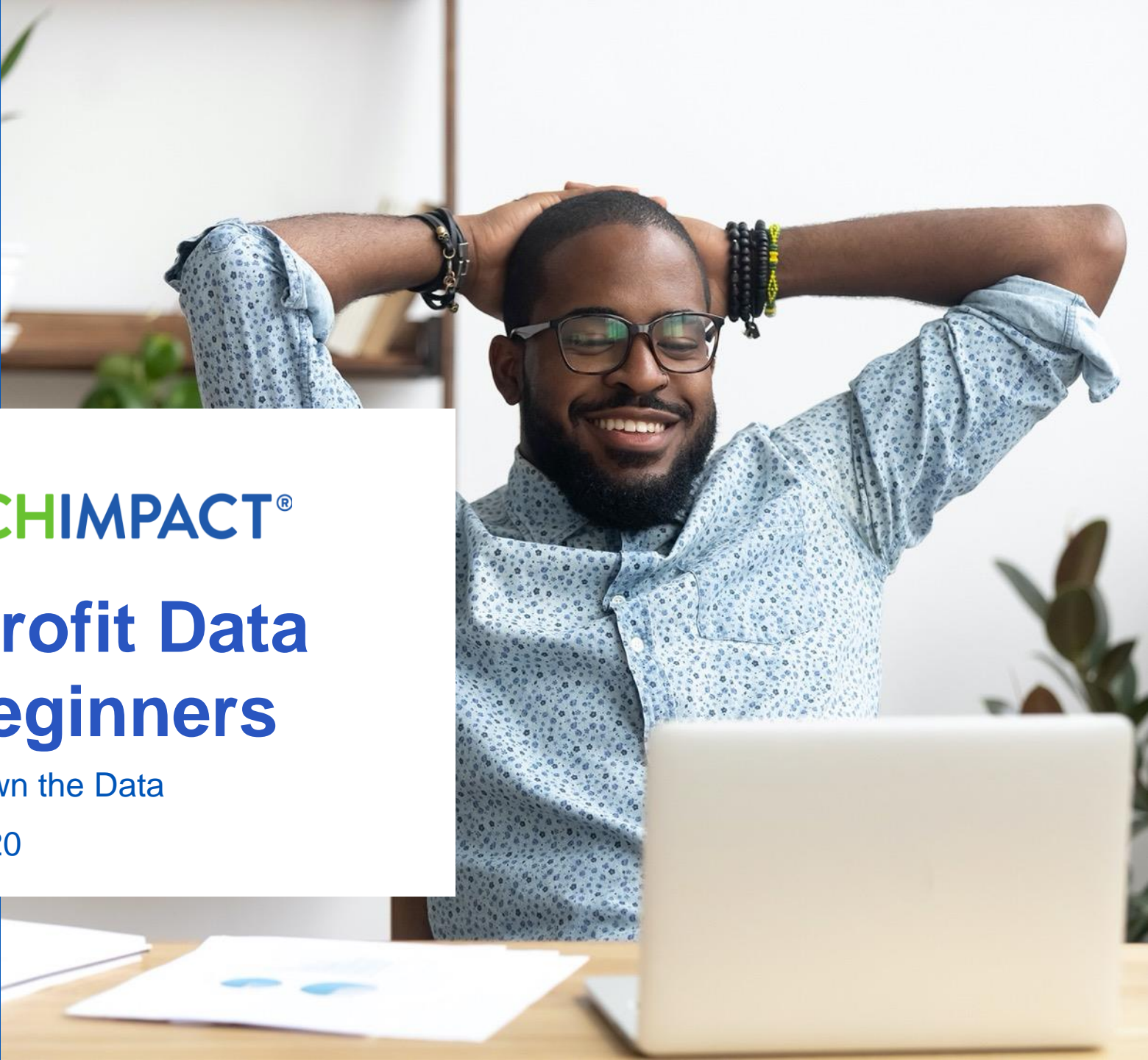




# Nonprofit Data for Beginners

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](http://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](mailto: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](#).

## Nonprofit Beginners

This course  
on the following

- **Thu**  
Que
- **Thu**  
the
- **Thu**  
You





## 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.



# 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







**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





# CONSIDER ORGANIZATIONAL HEALTH DATA

Financial Health

Fundraising Health

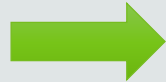
Marketing and  
Communications  
Health

Staff and Board  
Health



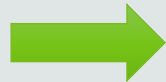
# WHERE DO YOU FIND ORGANIZATIONAL HEALTH DATA?

Finances



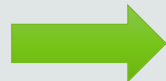
Accounting systems

Fundraising



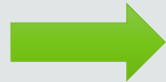
Donor database and  
accounting

Marketing and  
communications



Online systems, Google  
Analytics, etc.

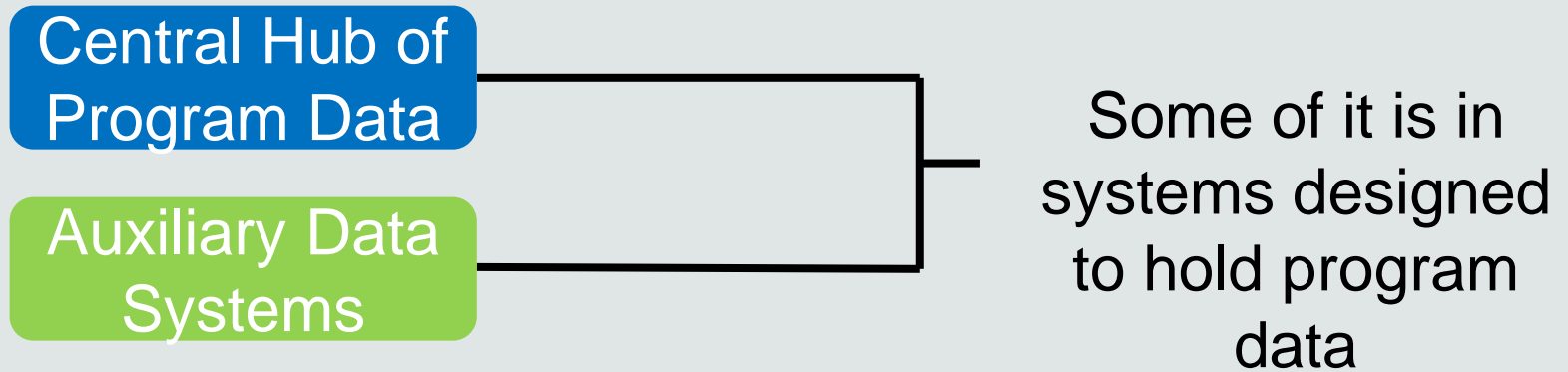
Staff/board health



Human resources  
system, board  
governance work



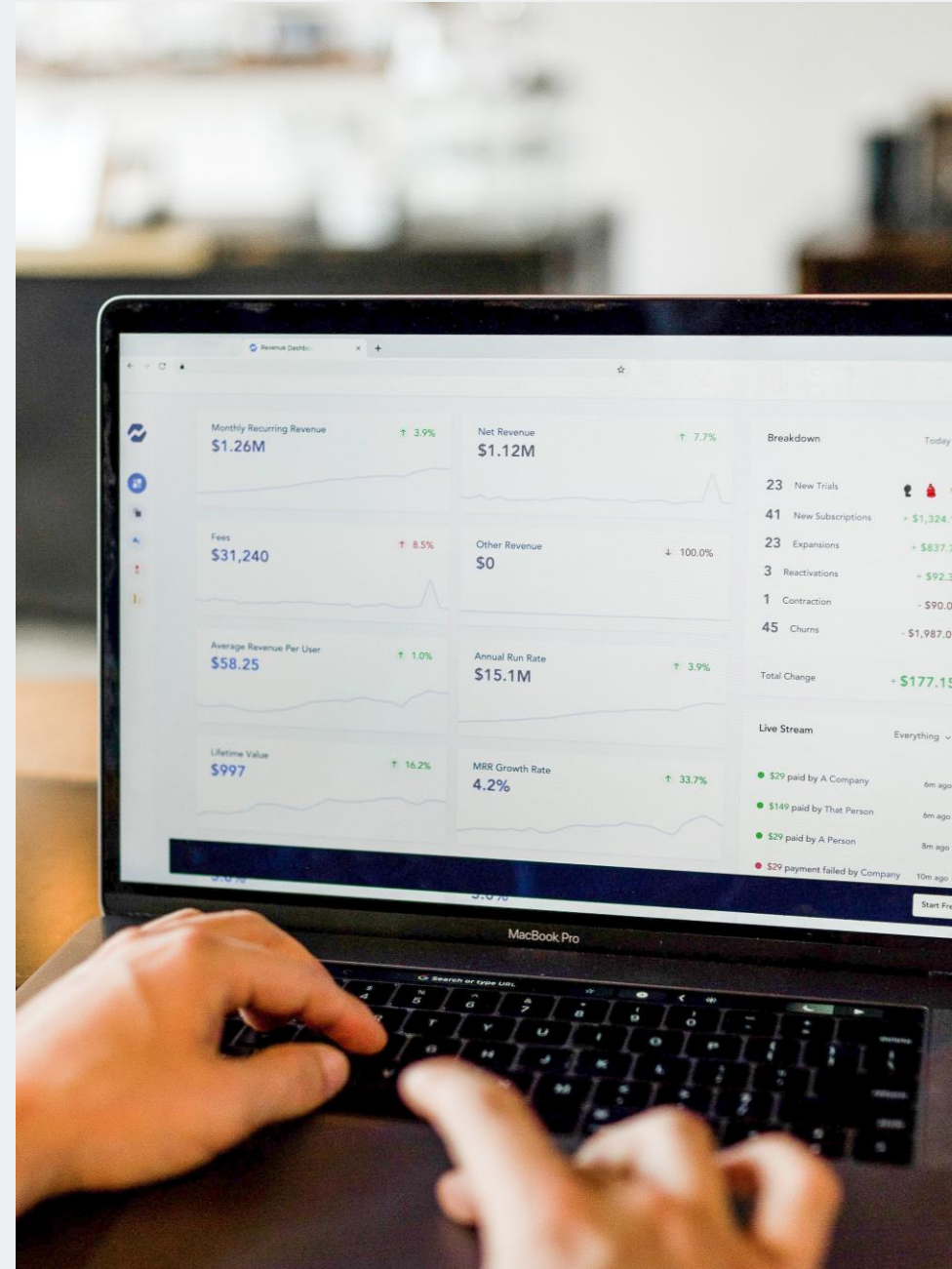
# WHERE DO YOU FIND PROGRAM DATA?





# WHERE DO YOU FIND PROGRAM DATA?

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





# CLIENT/CASE MANAGEMENT

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

### Client Intake Search

-- Add Search Field --  

Name (Client Intake)

First

Middle

Last

Date of Birth (Client Intake)

is on


County (Client Intake)

--Please Select--

Household Name (Household)

Showing 1 - 20 of 77 matching records (0.65 Seconds)

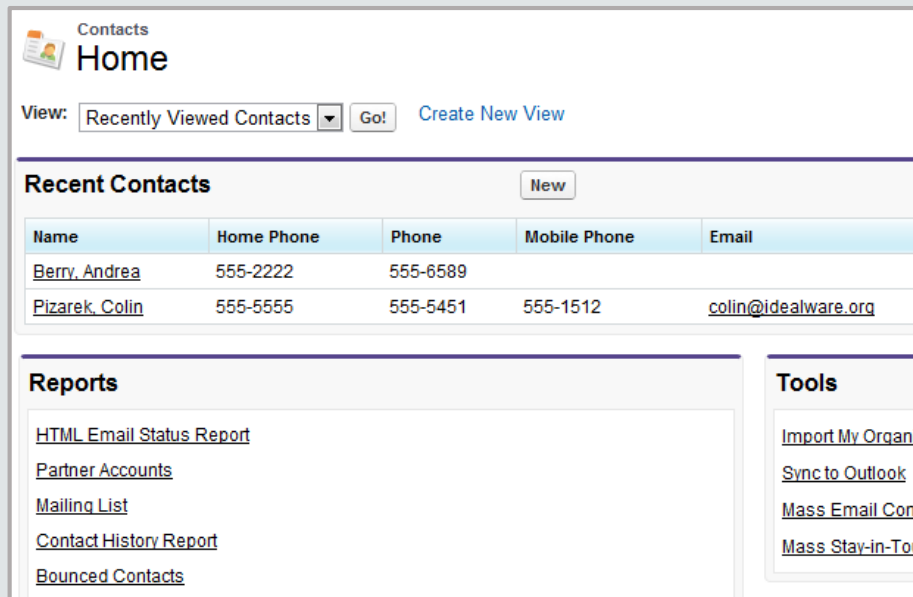
Name (Client Intake) ▲	Date of Birth (Client Intake)	County (Client Intake)	Household Name (Household)
Jim Topple	04/22/1971	Washington County	Topple
Theodore Thompson	01/01/1978	Isanti County	Thompson
Suzanna Thompson	02/04/1978	Isanti County	Thompson
Lucia Thompson	03/05/2008	Isanti County	Thompson
Issac Thompson	03/05/2008	Isanti County	Thompson
Dahlia Thompson	03/05/2008	Isanti County	Thompson

 **TECHIMPACT**®



# CONSTITUENT RELATIONSHIP MANAGEMENT

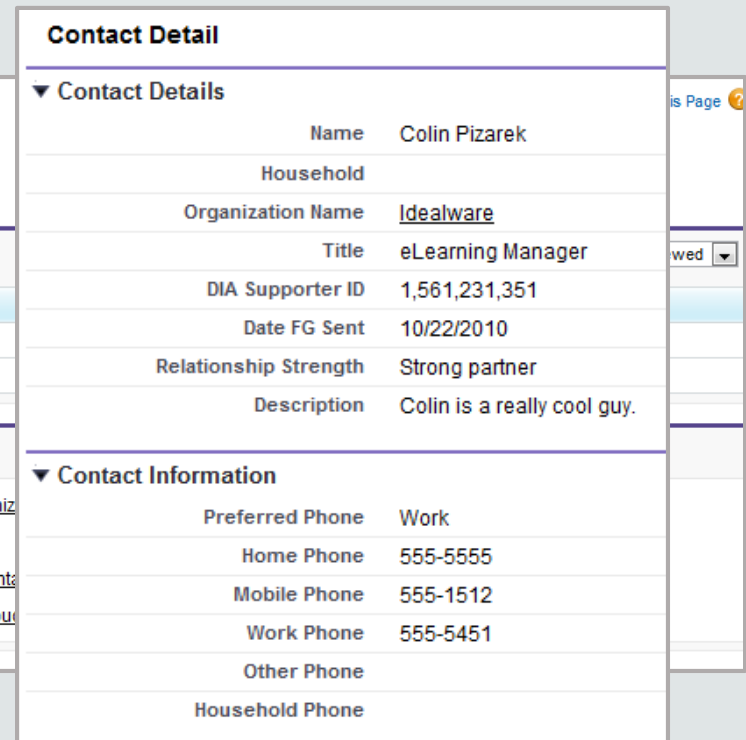
Track data on several different types of constituents in one place.



The screenshot shows the 'Contacts Home' page in Salesforce.org. At the top, there's a 'View:' dropdown set to 'Recently Viewed Contacts' with a 'Go!' button and a 'Create New View' link. Below this is a 'Recent Contacts' section with a 'New' button and a table of contacts. The table has columns for Name, Home Phone, Phone, Mobile Phone, and Email. Two contacts are listed: Berry, Andrea and Pizarek, Colin. Below the table is a 'Reports' section with links to HTML Email Status Report, Partner Accounts, Mailing List, Contact History Report, and Bounced Contacts. To the right of the reports is a 'Tools' section with links to Import My Organization, Sync to Outlook, Mass Email Contact, and Mass Stay-in-Touch.

Name	Home Phone	Phone	Mobile Phone	Email
<a href="#">Berry, Andrea</a>	555-2222	555-6589		
<a href="#">Pizarek, Colin</a>	555-5555	555-5451	555-1512	<a href="mailto:colin@idealware.org">colin@idealware.org</a>

Salesforce.org



The screenshot shows the 'Contact Detail' page for Colin Pizarek. It has two main sections: 'Contact Details' and 'Contact Information'. The 'Contact Details' section includes fields for Name, Household, Organization Name, Title, DIA Supporter ID, Date FG Sent, Relationship Strength, and Description. The 'Contact Information' section includes fields for Preferred Phone, Home Phone, Mobile Phone, Work Phone, Other Phone, and Household Phone.

Contact Detail	
▼ Contact Details	
Name	Colin Pizarek
Household	
Organization Name	<a href="#">Idealware</a>
Title	eLearning Manager
DIA Supporter ID	1,561,231,351
Date FG Sent	10/22/2010
Relationship Strength	Strong partner
Description	Colin is a really cool guy.
▼ Contact Information	
Preferred Phone	Work
Home Phone	555-5555
Mobile Phone	555-1512
Work Phone	555-5451
Other Phone	
Household Phone	



# MEMBERSHIP MANAGEMENT

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

The screenshot displays the Admin Home dashboard of a Membership Management System. The top navigation bar includes links for Admin Home, Website, Components, Database, Forms, Reports, Help Center, View My Site, and Logout. Below the navigation bar, the dashboard is divided into several sections:

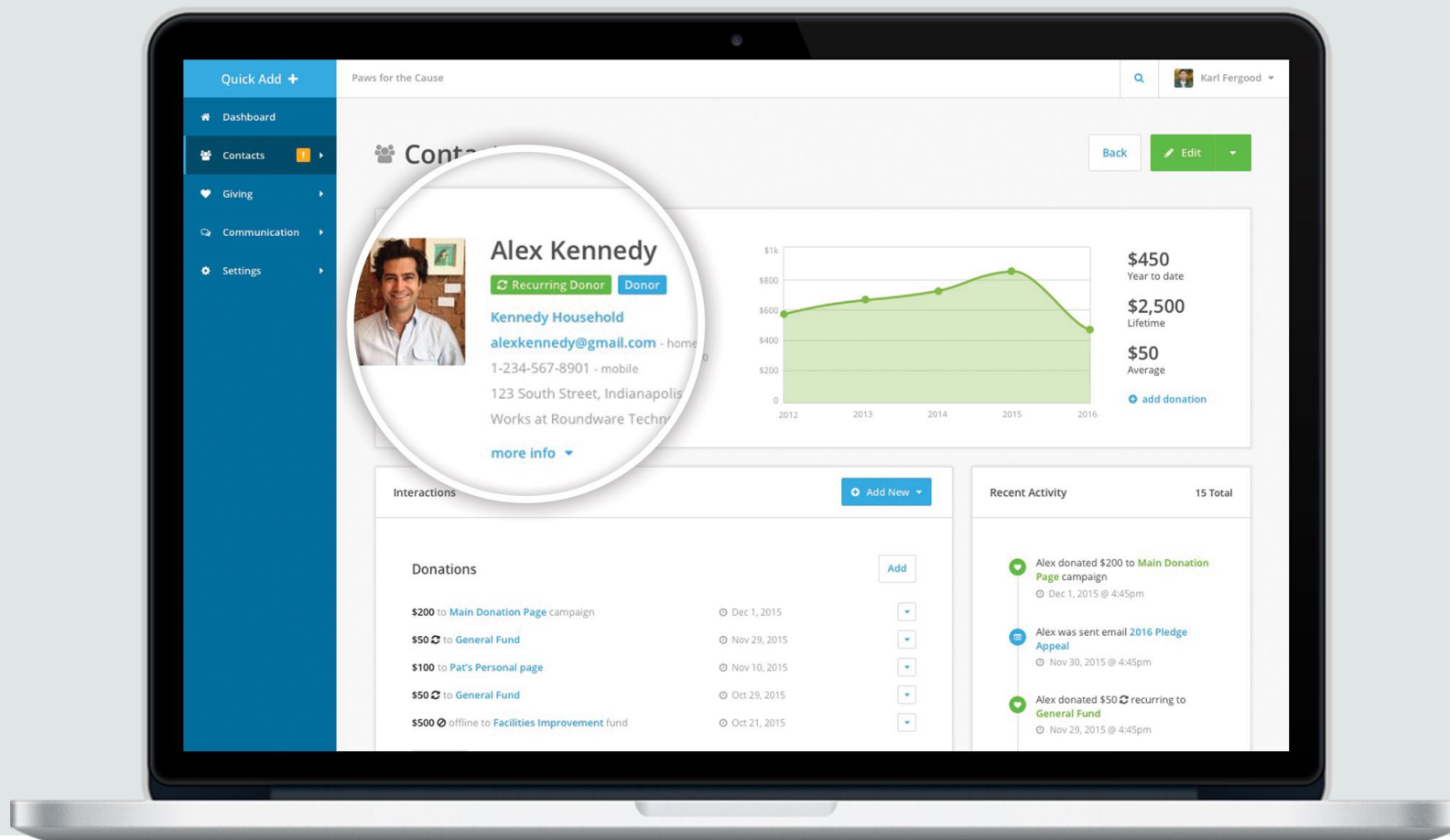
- Shortcuts:** A grid of icons for quick access to various functions: Article Manager, Attribute Management, Form List, General Ledger, Media Manager, Menu Manager, Saved Messages, Advanced Search, Event Calendar, Revenue Account, Mid-Atlantic, List of Articles, Forms, Data Import, Forms, and Have Not Renewed. A "See More" button is located at the bottom right of this section.
- MemberClicks Resources:** A section with icons for MemberClicks Help, MemberClicks Training Videos, MemberClicks University, and VIDEOS.
- Saved Searches and Reports:** A section with a row of circular icons representing different saved searches and reports.
- Admin Home Statistics:** A section with a green header and a sub-header "Admin Home Statistics". It includes a "Manually Refresh" button and a note: "Current Admin Home Statistics are available every five minutes." Below this is a table with the following data:

Profiles	Number	Actions
ASA Profiles	1	<a href="#">View</a> <a href="#">Add</a>
Active Profiles	46	<a href="#">View</a> <a href="#">Add</a>
Admin	1	<a href="#">View</a>
Basic Contact	11	<a href="#">View</a>
Company Member	2	<a href="#">View</a>
Employee Member	5	<a href="#">View</a>
Grace Period Members	0	<a href="#">View</a>
Organizational Member	4	<a href="#">View</a>
Professional Member	21	<a href="#">View</a>
Student Member	2	<a href="#">View</a>
Users With No Group	0	<a href="#">View</a>



# DONOR MANAGEMENT

Track information specifically about donors and fundraising.





# SPECIALIZED CENTRAL HUB SYSTEMS

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

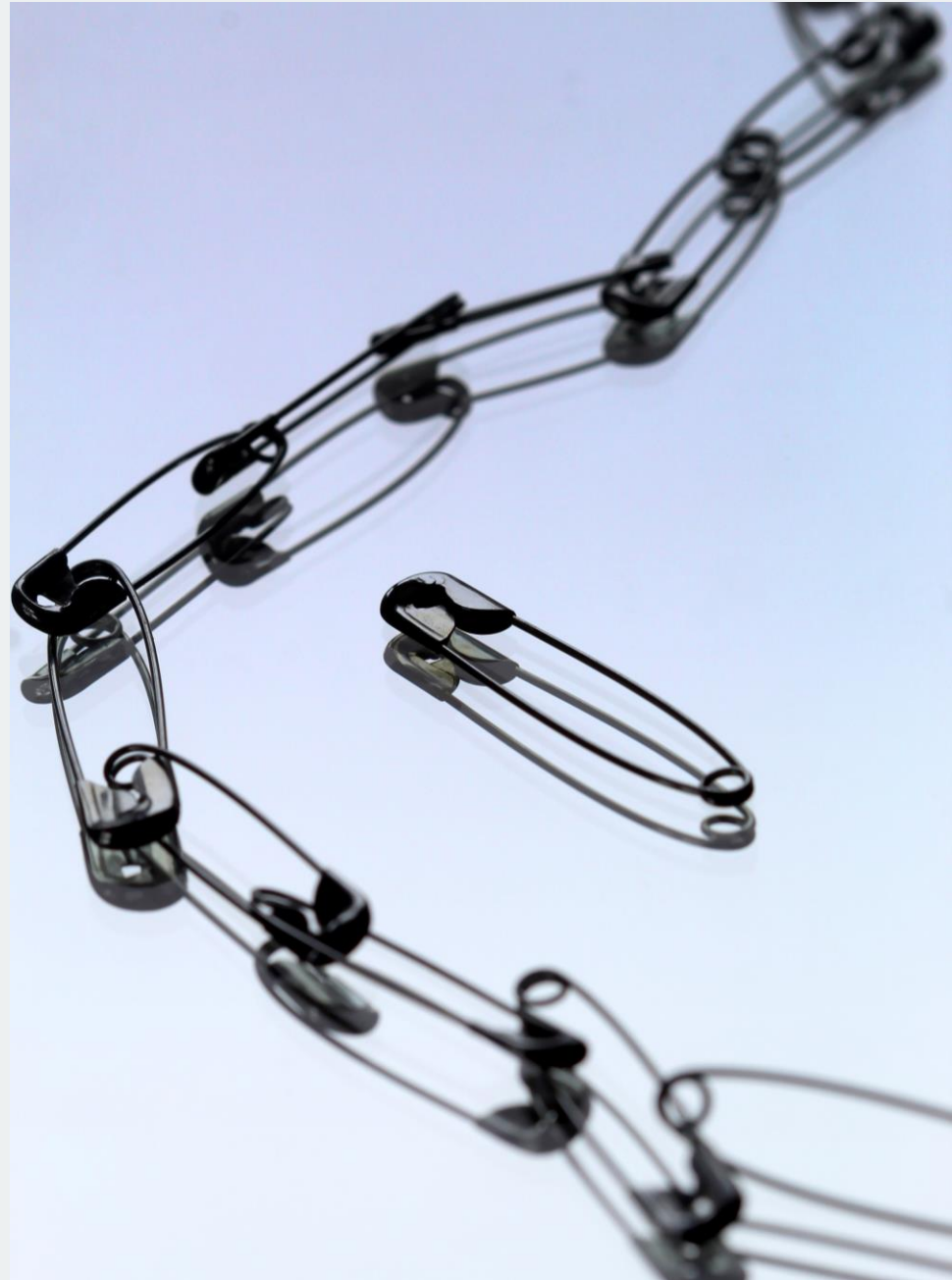


# SchoolWorks



# 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				
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.

An orange rounded square containing the text "Organizational Health Metrics".

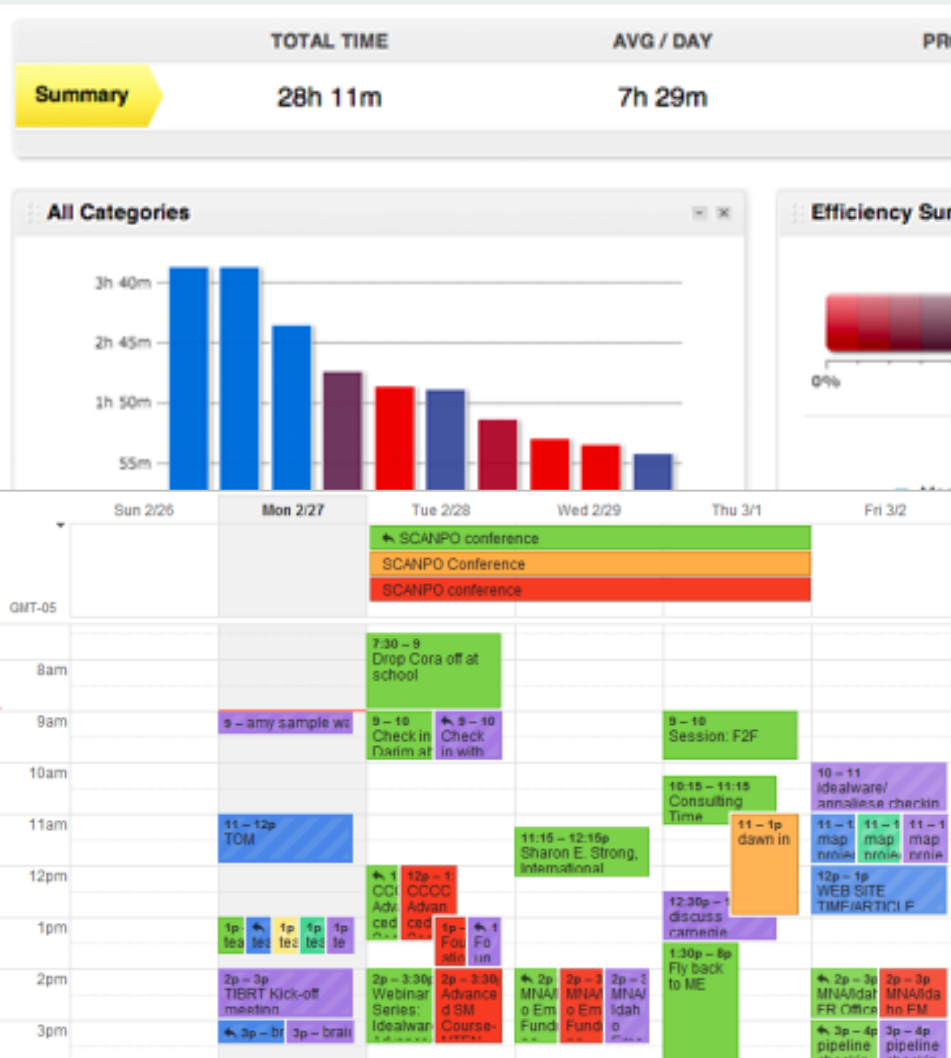
Organizational  
Health Metrics

A green rounded square containing the text "Program Metrics".

Program  
Metrics





# YOUR ADMINISTRATIVE SYSTEMS

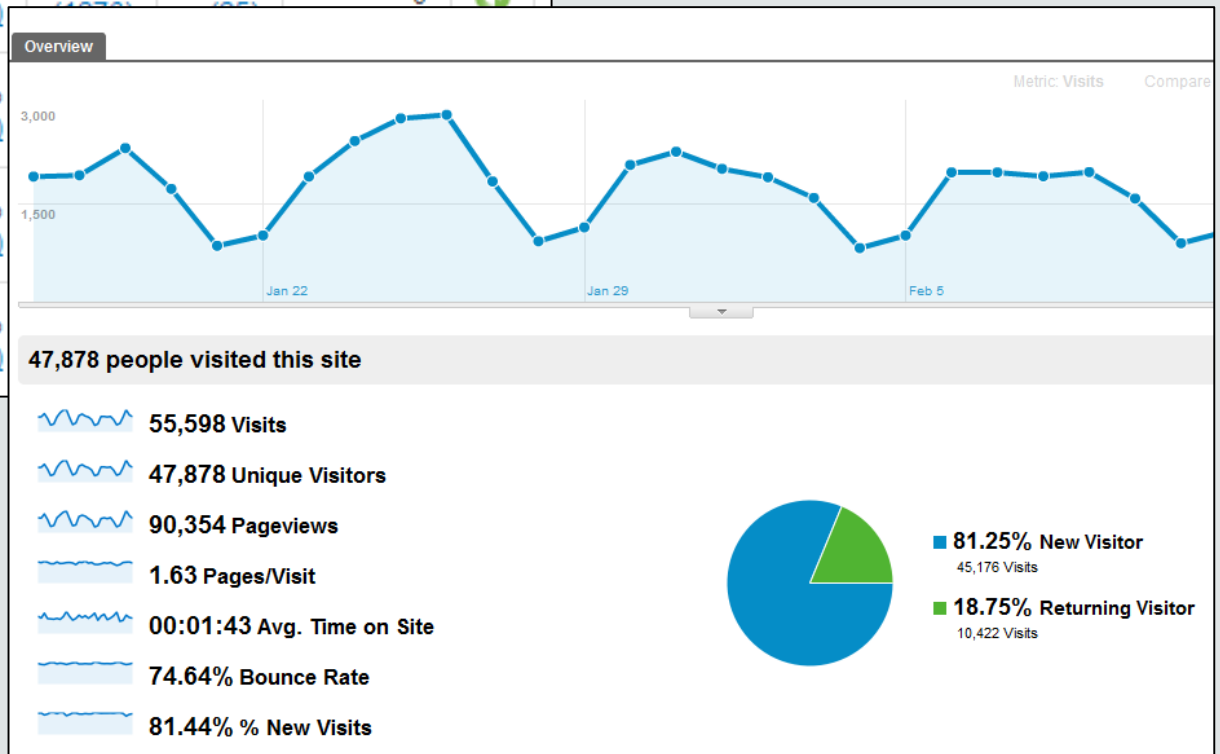


- Count emails.
- Count appointments or meetings.
- Report from your finance system.



# WEB OR EMAIL ANALYTICS

	Sent	Bounces	Spam Reports	Opt-outs	Opens	Clicks	Forwards	
	<a href="#">4583</a>	29.9% (1371)	0	0.1% (3)	27.3% (878)	3.3% (29)	0	
	<a href="#">4589</a>	29.9% (1371)	0	0.1% (6)	39.7% (1373)	2.0% (65)	0	
	<a href="#">4590</a>	30.2% (1388)	0	0.0% (2)				
	<a href="#">4585</a>	30.1% (1378)	0	0.2% (9)				
	<a href="#">4581</a>	30.2% (1383)	0	0.1% (4)				





# SOCIAL MEDIA CHANNELS

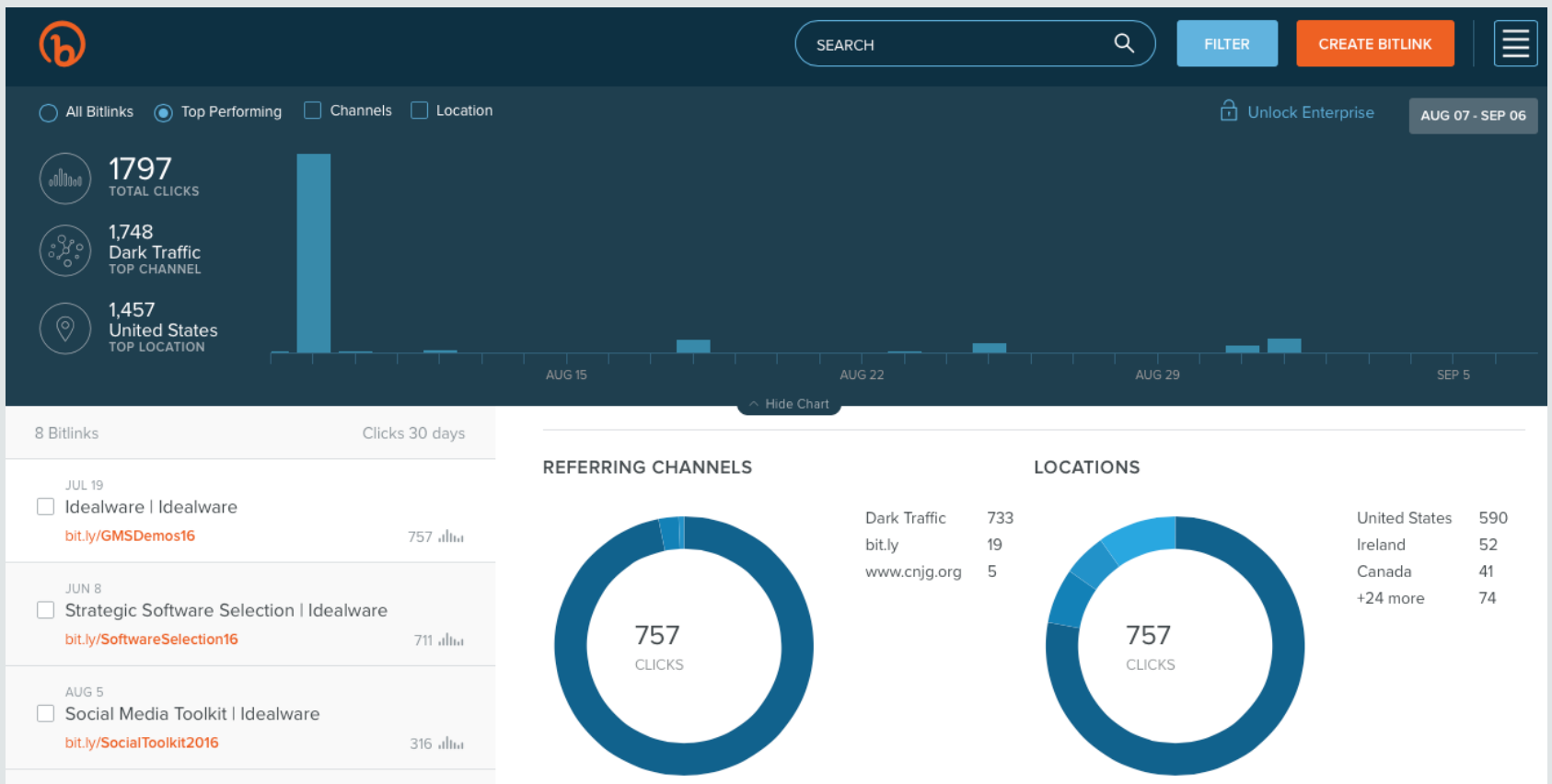
See who's looking at and interacting with your organization on social media.





# SHORTENED LINKS

Track embedded links across all social media channels.





# 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?







# HUNTING IN OTHER PEOPLE'S DATA



# WHAT ARE SOURCES OF PUBLIC DATA?

Brainstorm some answers in  
the question box.





# PARTNER DATA





# ACADEMIC DATA





# INTO THE CHAT

What opportunities for public data jump out at you?







# 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



Surveys

Interviews

Field Notes





# 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
<ul style="list-style-type: none"><li>• Data is online—doesn't need to be entered to be analyzed</li><li>• Quicker to create</li></ul>	<ul style="list-style-type: none"><li>• Much easier to get someone physically present to do</li><li>• Higher response rate—even by mail</li><li>• Easier to use for less tech-savvy</li><li>• Doesn't require internet access</li></ul>





# 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?







# INTERVIEWS

Interviewing is time intensive, but it can be valuable.



# 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







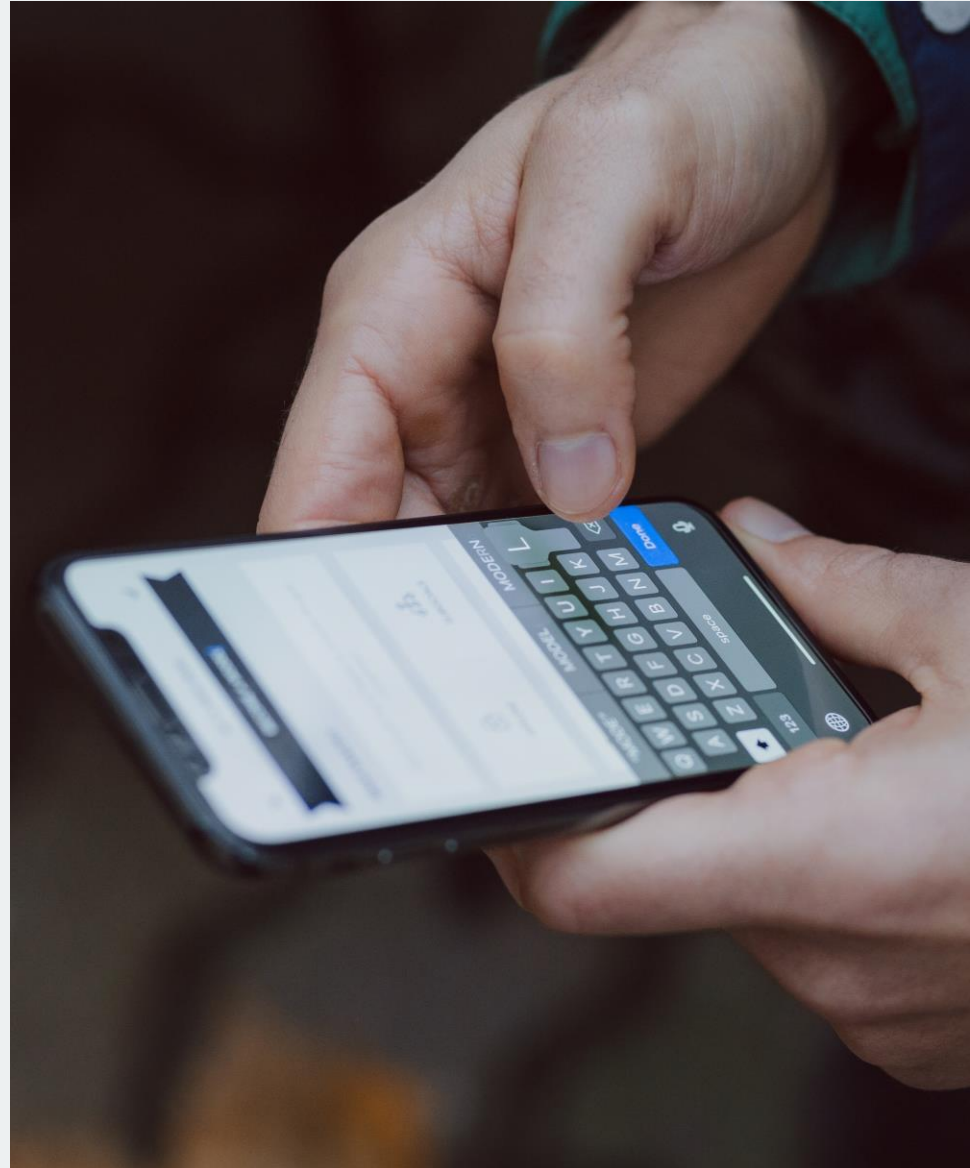
# TRANSLATE NOTES INTO INFORMATION

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.







# 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.







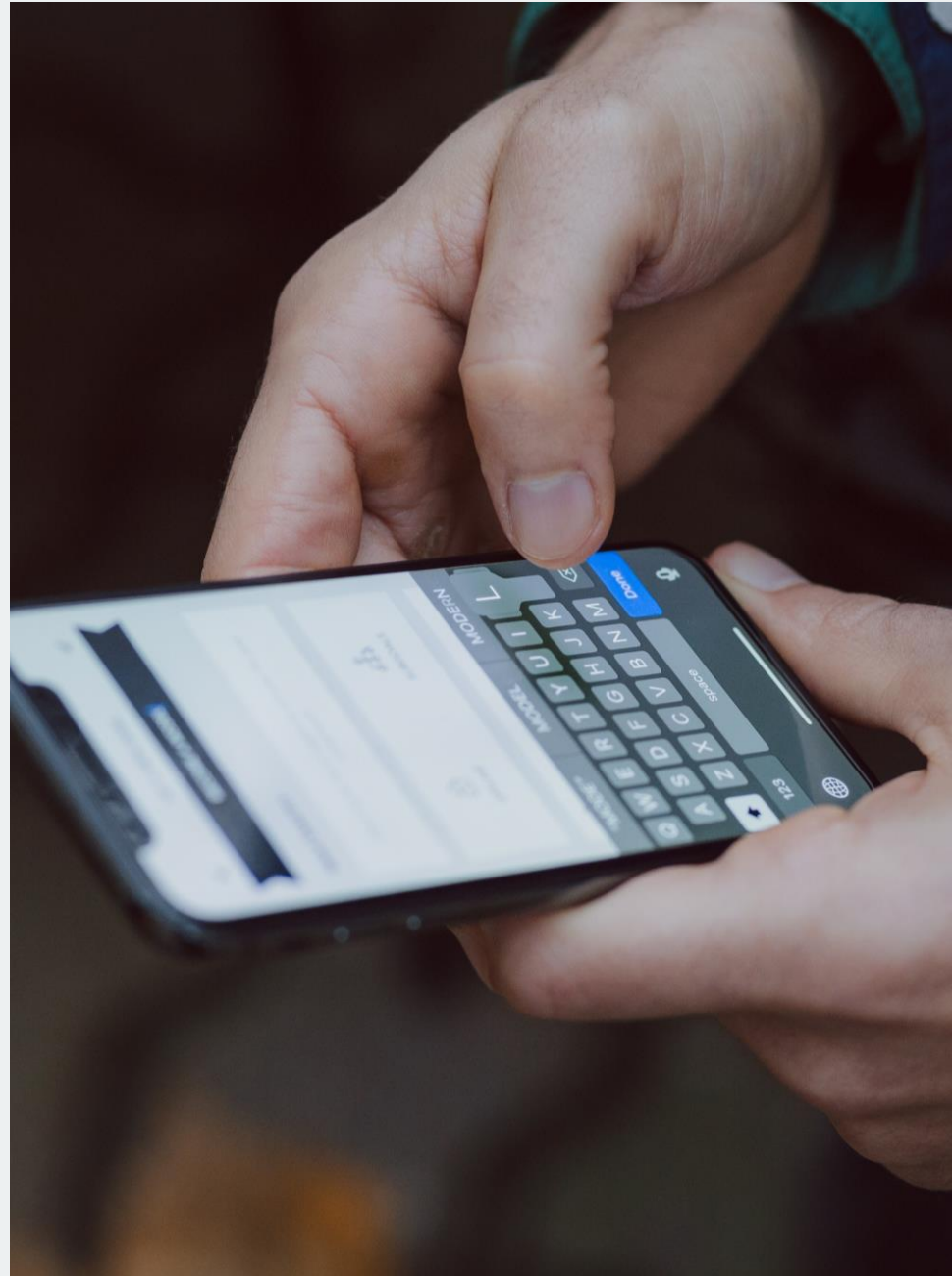
# WHO COLLECTS FIELD DATA?

- 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.





# PICKING THE RIGHT METRICS FOR YOU

posttv

#WOC  
IN  
TECH



# 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?

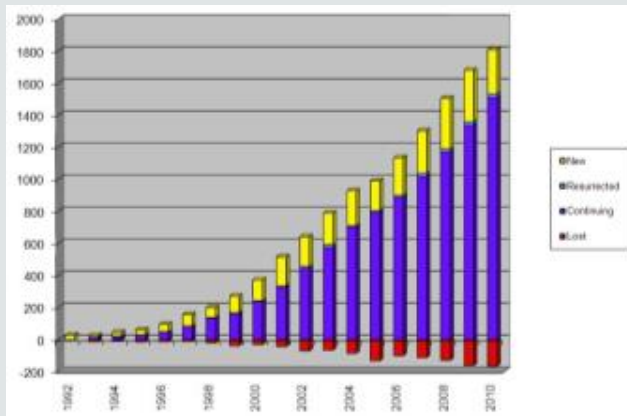




# WHAT DATA DO YOU ALREADY COLLECT?



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%
<b>21,636.69</b>	<b>43,000.00</b>	<b>-21,363.31</b>	<b>50.31788%</b>
6,000.00	17,500.00	-11,500.00	34.28571%
<b>6,000.00</b>	<b>17,500.00</b>	<b>-11,500.00</b>	<b>34.28571%</b>
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	
<b>12,887.00</b>	<b>30,250.00</b>	<b>-17,363.00</b>	<b>42.60165%</b>

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)

Form **8283**  
(Rev. October 1999)

**Noncash Charitable Contributions**  
 Attach to your tax return if you claimed a total deduction of over \$500 for all contributed property.  
 See separate instructions.

OMB No. 1545-0048  
 Attachment Sequence No. 08

Name of the taxpayer  
 Social Security Number  
 Mailing address of your principal residence

Identifying number

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

	(A) Name and address of the donee organization	(B) Description of donated property
1		
A		
B		
C		
D		
E		

**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.

2. If, during the year, you contributed less than the entire interest in the property, complete lines a–c.  
 a. Enter the date of the contribution. (b) Date acquired by donor (c) Date of valuation (d) Fair market value (e) Method used to determine the fair market value

3. If conditions were attached to any contribution listed in Part I, answer questions a–c and attach the required statement (see instructions).

a. Is there a restriction, either temporary or permanent, on the donee's right to use or dispose of the donated property?  
 b. Did you give to anyone (other than the donee organization or another organization participating with the donee organization) in cooperative fundraising the right to the income from the donated property or to the possession of the property, including the right to vote donated securities, to acquire the property by purchase or otherwise, or to designate the person having such income, possession, or right to acquire?  
 c. Is there a restriction limiting the donated property for a particular use?

For Paperwork Reduction Act Notice, see page 4 of separate instructions. Cat No. 8283-1 10-99 Form **8283** (Rev. 10-99)



Survey data?

Public info from your  
state or county?

Data from the field?



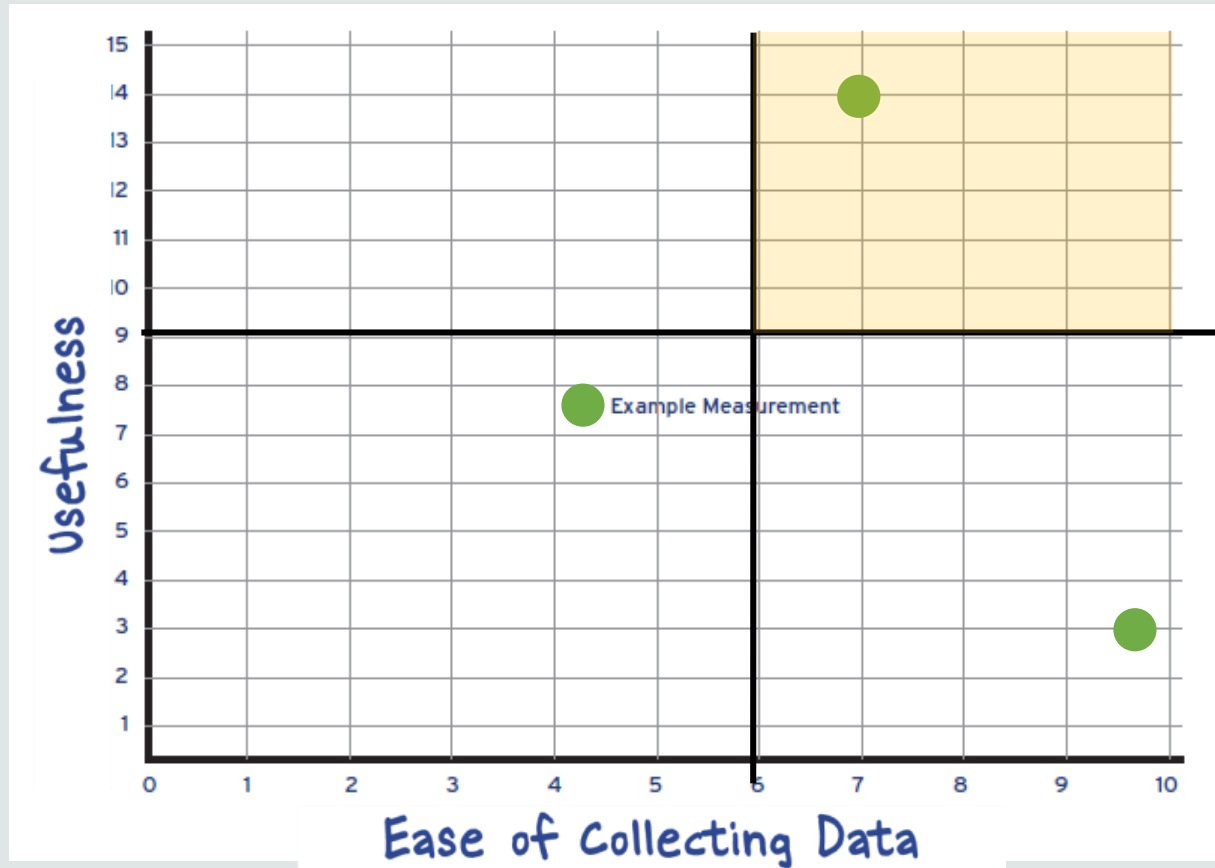
# DON'T WAIT FOR NEW TECHNOLOGY INFRASTRUCTURE

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





# THINK THROUGH THE RIGHT METRICS





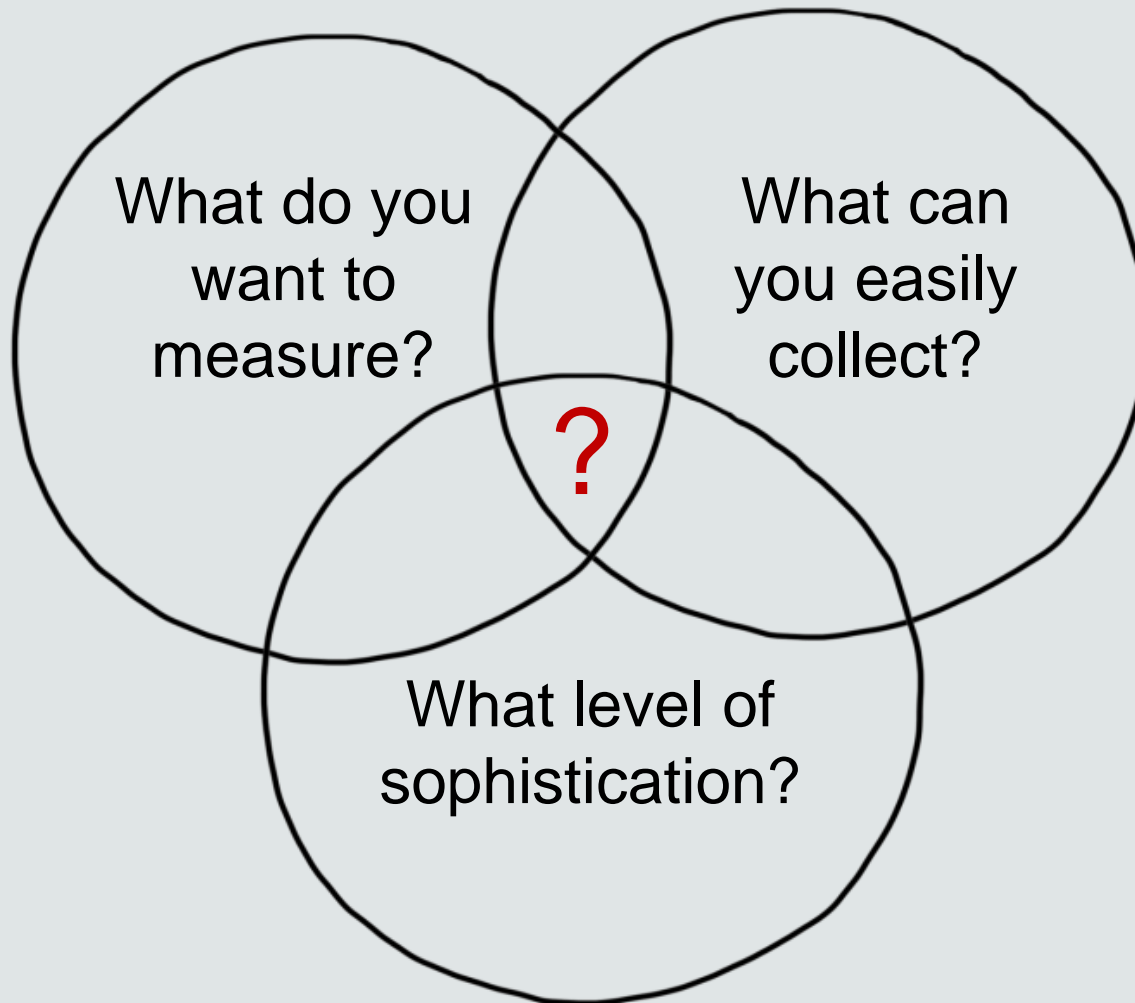
# BALANCING THESE FACTORS MAY NOT BE EASY

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





THANK YOU

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Liora Lebowitz: [liora@techimpact.org](mailto:liora@techimpact.org)

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