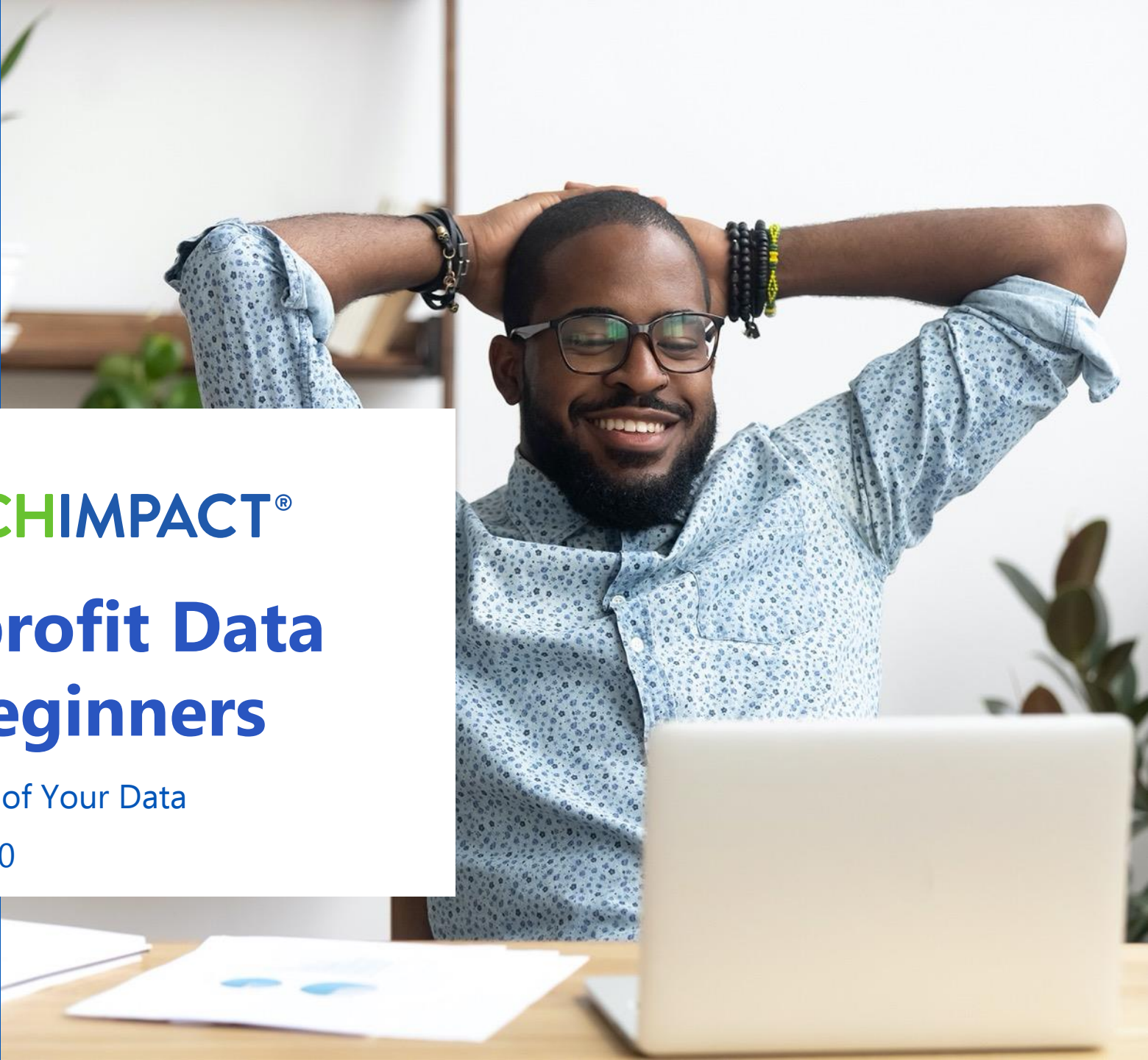




Nonprofit Data for Beginners

Making Use of Your Data

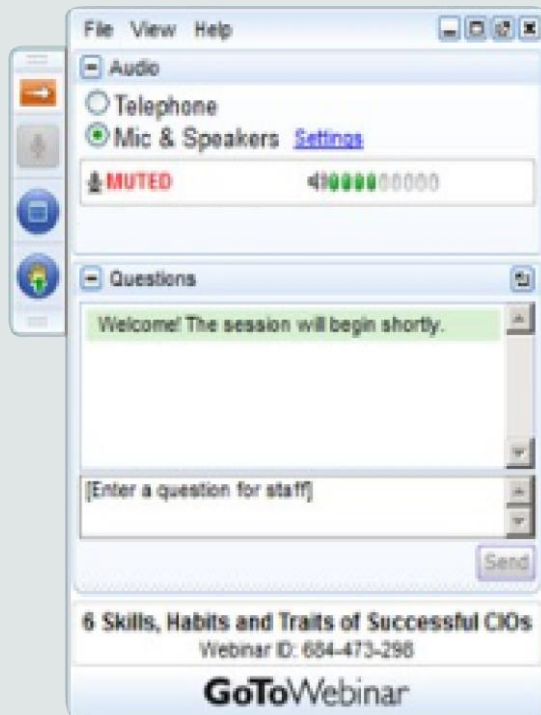
May 21, 2020



INTERFACE GUIDE

If you cannot hear the instructor, go to File->Preference->Audio and check your audio source.

CONTROL PANEL



Control panel options may vary slightly depending on webinar configuration.

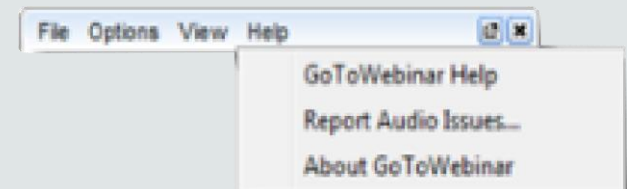
AUDIO PANEL

Use **Settings** to configure and test audio and other preferences.

QUESTION PANEL

Enter questions here

GRAB TAB



TECHNICAL ASSISTANCE

Click **Help** at the top of the Control Panel to access online help and links for Tech Support.

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.

SUSAN CHOE

Executive Director, Ohio Legal Help



I am a lawyer with a background in legal services and setting up large, statewide systems. I've worked in several leadership positions at the Ohio Attorney General's office, including heading up Consumer Protection and Civil Rights. I encourage and challenge my team to use data to inform design and decision making.

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.

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- 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.
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Session 1: Asking the Right Questions

You can access the webinar [here](#).

Nonprofit Beginners

This course
on the following

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



WHAT WE'LL COVER TODAY:

- Becoming Data Focused
- Getting Data in
- How Will Metrics Be Used?
- Create An Action Plan
- Additional Considerations
- College Spring—A Case Study
- Designing a Process for Success

- 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.

A photograph of three people in an office setting. In the foreground, a woman with blonde hair, wearing a blue blazer over a yellow top, is smiling broadly at the camera. Behind her, another woman with dark hair in a bun is looking at a laptop. To the left, a man with a beard is partially visible, looking towards the women. They are all seated at desks with computers. A small potted plant is on the desk in the foreground. The background is dark and out of focus.

BECOMING DATA FOCUSED

INTO THE CHAT

Have you had success hunting down useful data
in the past week?



YOU'RE ON YOUR WAY!

You're already working towards focusing on your data.



KEY WAYS DATA CAN HELP

- To identify tactics to use
- To track implementation
- To track impact
- To serve as a warning system
- To demonstrate success
- To comply with funder or legal requirements

CONSIDER ORGANIZATIONAL HEALTH

Financial
Health

Fundraising
Health

Marketing and
Communications
Health

Staff and Board
Health

THINKING ABOUT PROGRAM METRICS



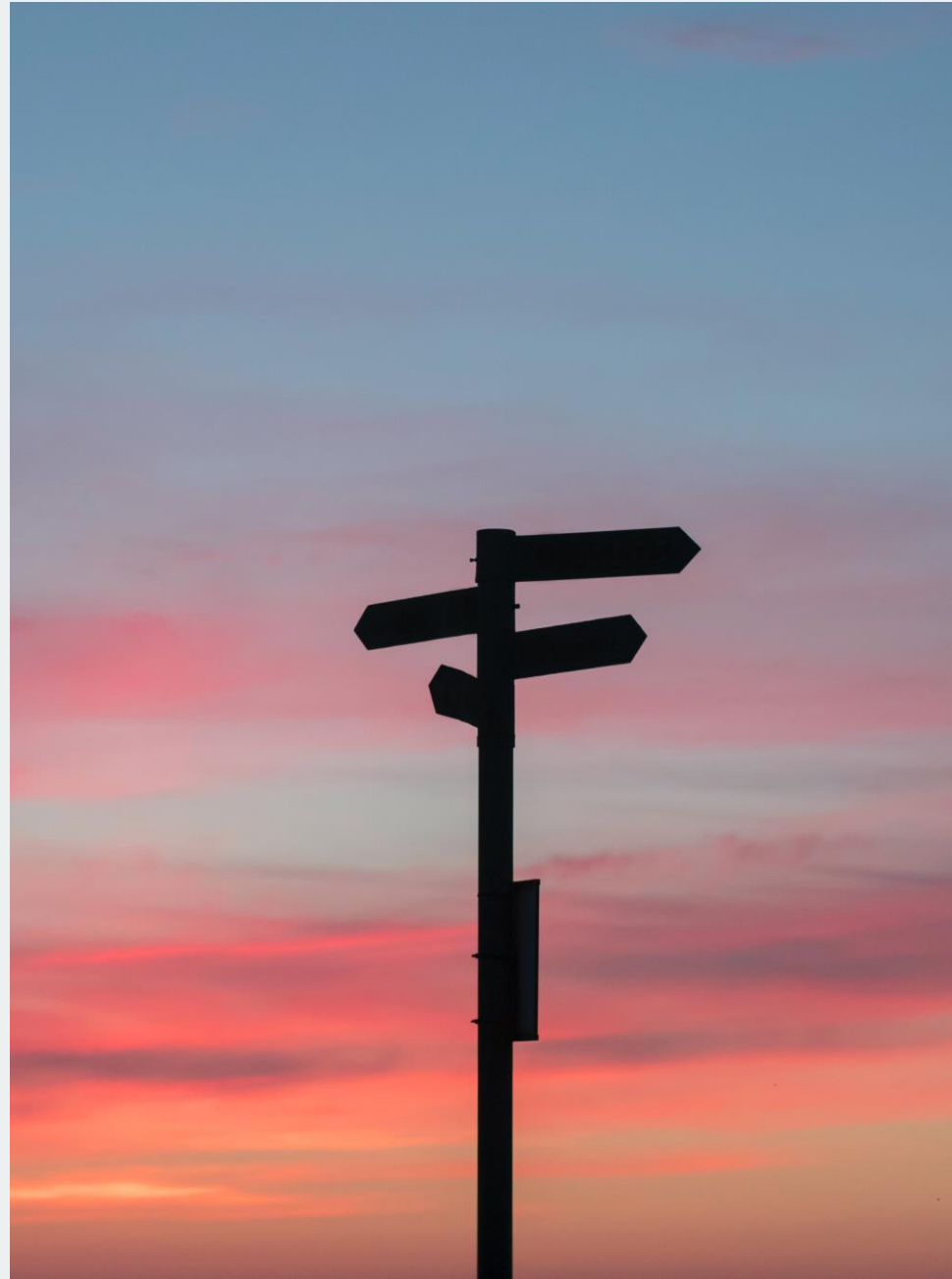


WHERE TO FIND DATA

- In your own data systems
- In other people's data
- By generating new data

WHERE TO NOW?

You'll need to think about how you can use the data to take your organization in the right direction.



WHAT TO THINK ABOUT

How will metrics
be created?

How will metrics
be used?

How will you create a
plan for action?

POLL

Does your organization have a clear plan for establishing and collecting the needed data?

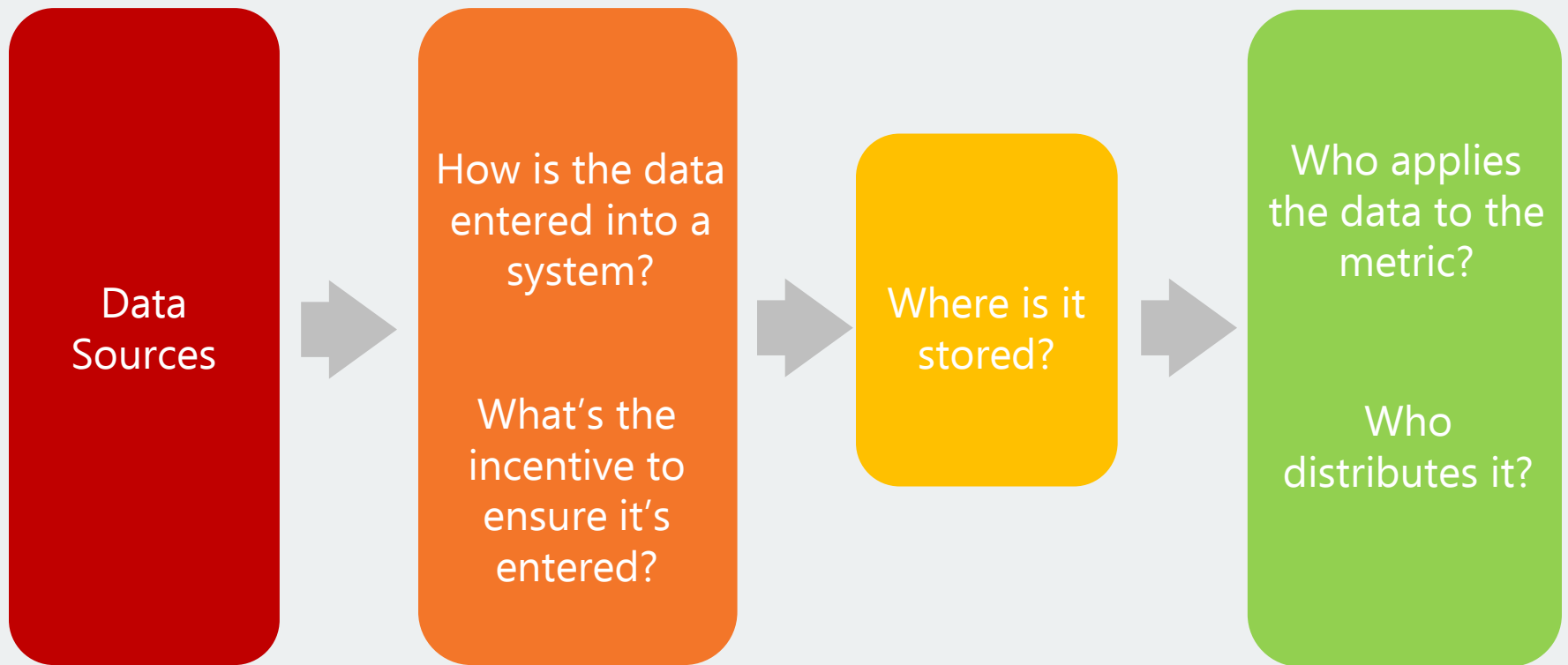
- Yes
- We have a plan, but it's inadequate
- No
- I don't know





GETTING DATA IN

THE CREATION PROCESS



Who's in charge of this whole process?

How will you spot-check to ensure the metric accurately reflects reality?

WHERE IS THE DATA COMING FROM?





HOW IS IT BEING ENTERED?

Make sure you know what data needs to be stored and who is in charge of entering it.

INCENTIVIZE DATA ENTRY

How can you make sure those who enter data are on board?

- Give them reports that are useful to them.
- Understand how it helps provide services.
- Make data visible so everyone can see who's not entering it.





WHERE WILL YOU STORE IT?

Where will the data be stored so you can easily get it out again?

WHO NEEDS ACCESS?

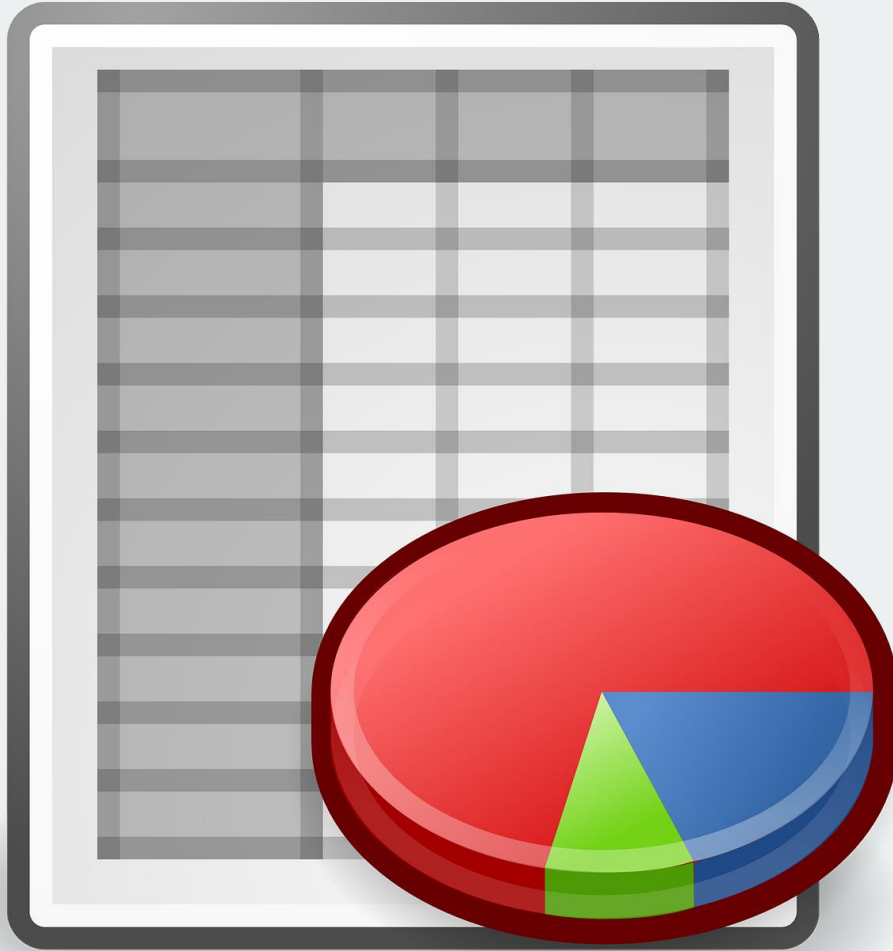
Who will use the data to implement tactics?

Who will be the one to create metrics from the data?



HOW WILL THE DATA BE PRESENTED?

- Within systems
- Ad hoc via spreadsheets
- Using a dashboard



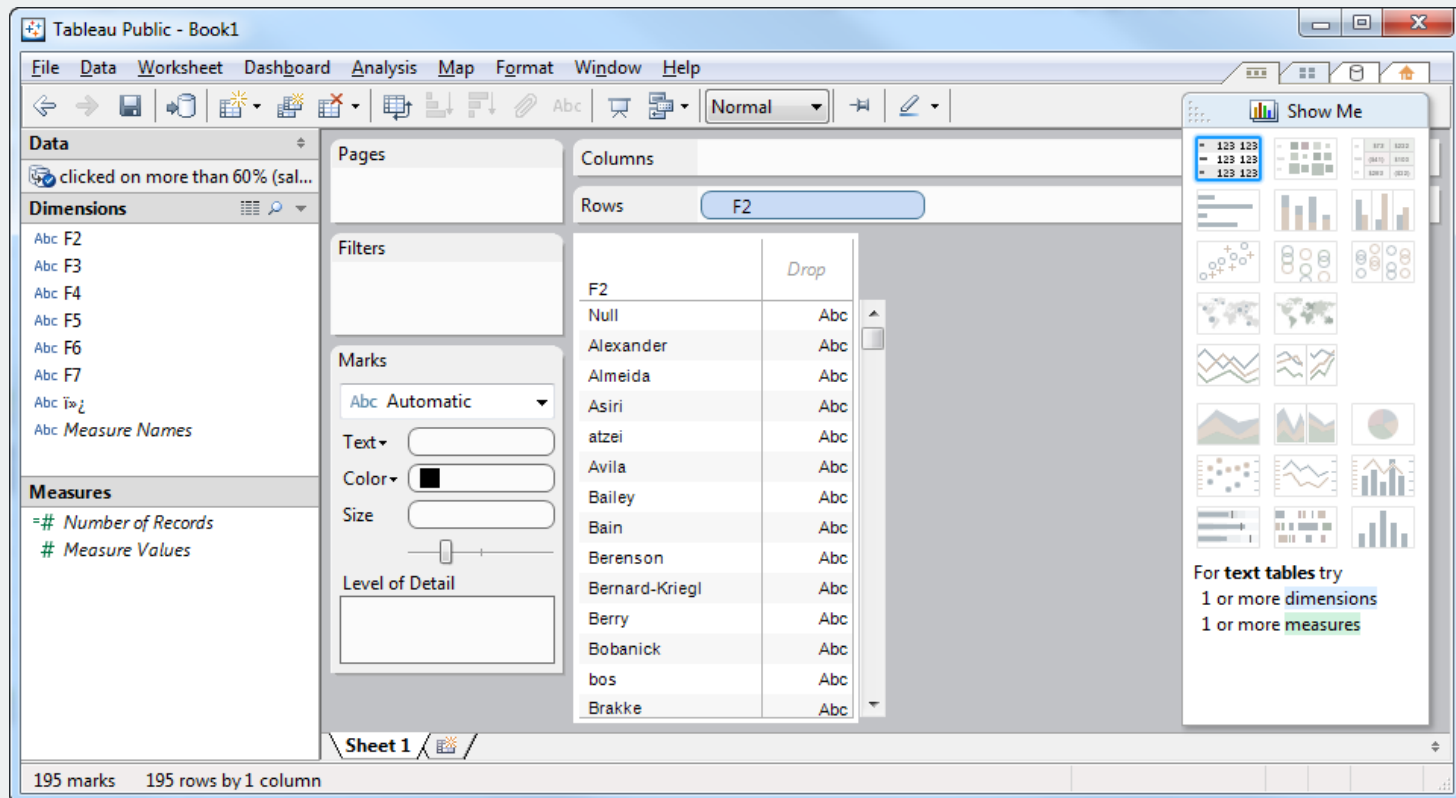
DO YOU NEED A DASHBOARD?

Probably not at first. They can be useful but they're an investment and can be complex to set up.



SPECIFIC DASHBOARD TOOLS

Tools such as Tableau, iDashboards, GoodData and QlikView offer specific dashboard features for those willing to do more technical setup.



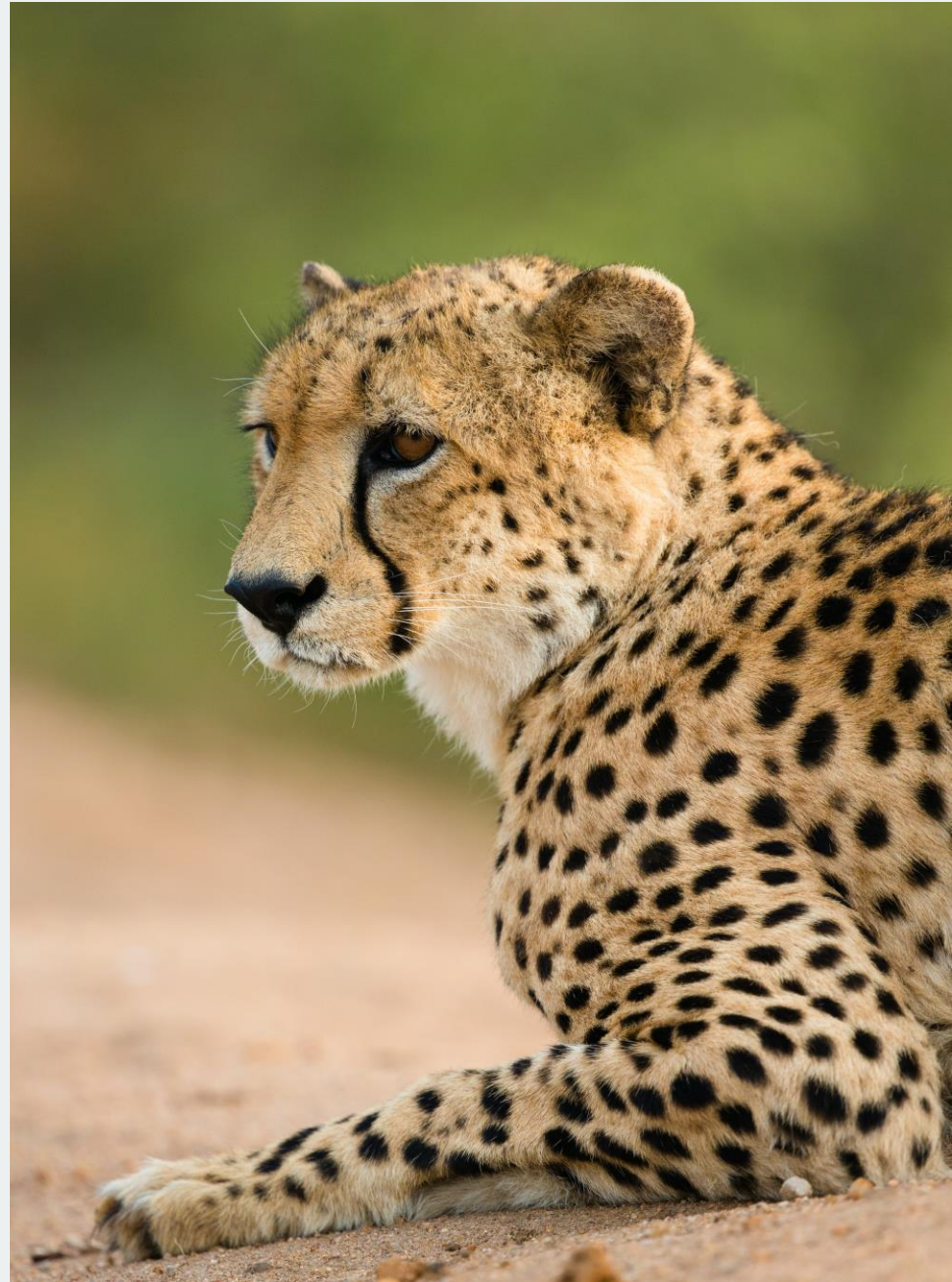


WHO'S IN CHARGE?

One person should be in charge of making sure the whole process moves smoothly.

SPOT CHECK

Someone will need to spot check the data regularly to make sure it accurately reflects reality.





CHECK IN ON THE METRICS

Plan to think about this entire process every six months or year.

- Are you tracking the right data?
- Does each metric accurately reflect what you care about?
- Is collecting the data improving or decreasing data accuracy?

INTO THE CHAT

Which of these steps seems the most challenging?



Numbers Can Be Scary

“

“People who tend to be attracted to the nonprofit sector—they care about the individuals. Especially people drawn to social services. Numbers are very scary to put on individuals. [We need to get] people to understand that data analysis is important—it helps individuals.”


—Focus group participant from a large social service agency



“

“The newer staffers—not necessarily the younger ones—value data more. We have a split with the people who value it based on their comfort level, but it’s getting there.”

-Maria Macaluso, **Women’s Center of Montgomery County**



“Everybody gathers data. Everybody. Even the cooks—we cook for all our centers and transport the meals, so how many ounces of food each child is getting, temperature logs, all that stuff, inventory control.

-Janell Frazier, **Central Texas 4C, Inc.**

CASE STUDY: NEIGHBORS, INC.

Getting staff on board with new data practices.



STRONG INTERNAL CHAMPION

Director of Development is a self-proclaimed “data enthusiast” who is leading the charge to use program data effectively.





DATA TRACKED RIGOROUSLY

- All services received, through all programs, and when people receive them.
- Their address and demographics.
- Who donates food and how much.

NEXT THEY MUST LEARN FROM THE DATA

They have a lot of data—that's great. But they're still working on making that data a key part of decisions and processes.





EVERYONE NEEDS TO GET ON BOARD

They rely on an army of volunteers. Many volunteers can be reluctant to change. They don't always understand how data becomes information.

THEY'RE TRYING TO CONSOLIDATE SYSTEMS

They're tracking donor relationships in Salesforce and client services in Access.

They create a dashboard of services provided in Excel, but would like to automate that.

[illegible]

WORKING TOWARD THE FUTURE

“With a board and an executive director that understand the value of data, the rest of it will follow.”





**HOW WILL METRICS
BE USED?**

PUTTING THE METRICS TO WORK

How frequently will you create the metrics?

Who will they be distributed to?

In what meetings will they be used?

What decisions shouldn't be made without them?

How frequently will you plan to adjust your actions based on what the metrics say?

HOW FREQUENTLY WILL YOU APPLY DATA TO YOUR METRICS?

Should you get a weekly
picture of operations?
Monthly? Yearly?





KEY WAYS DATA CAN HELP . . .

- To identify tactics to use
- To track implementation
- To track impact
- To serve as a warning system
- To demonstrate success
- To comply with funder or legal requirements

WHO WILL THEY BE DISTRIBUTED TO?

Who will need to see them and use them once they have been created? How often do they need to see them?



WHEN WILL YOU USE THE METRICS



Are there meetings in which the metrics should be reviewed? What decisions should not be made without consulting them?

HOW FREQUENTLY WILL YOU ADJUST?

When will you take action on the information you have gathered?



CASE STUDY: NTEN



FOCUS ON OUTCOMES

NTEN broke it's mission and operations down into five key outcomes.

For instance, #2 is "There is an increased number of technology champions within nonprofit organizations."



THE CHAMPIONS

For #2, they thought through metrics:

- Does participation grow over time?
- Are the number of staff members representing individual organizations growing?
- Are nonprofit staffers taking part in an increasing number of NTEN services?





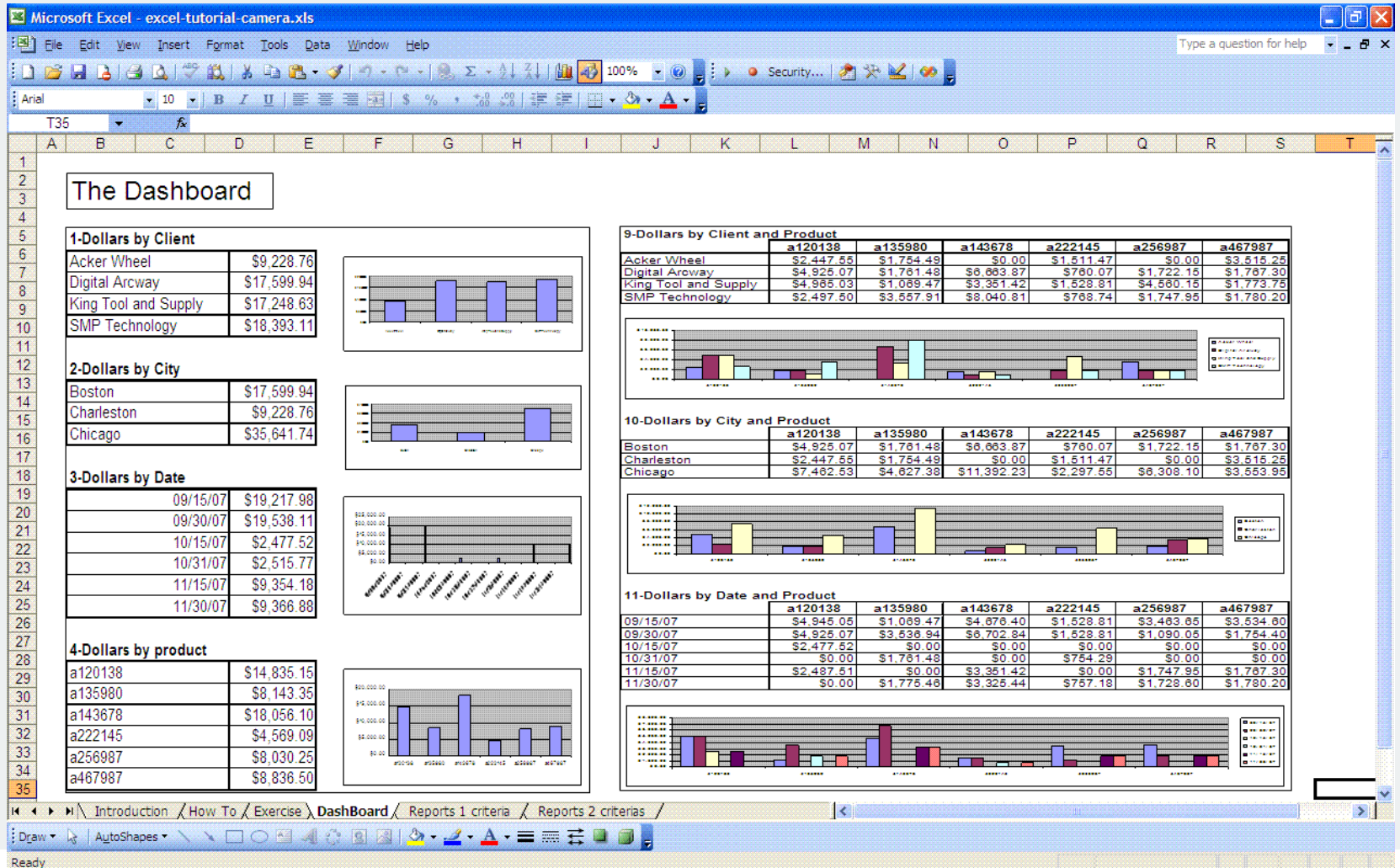
MEASURING

They made those questions measurable:

- How many people participate in events, download reports, or post to discussion lists?
- How many different organizations are represented by those people?

And then figured out how to collect and analyze that data.

THE METRICS ARE REPRESENTED IN A DASHBOARD



Data Is for Taking Action

“Once we have the data on the dashboard, it continues to be part of the strategic planning. During our monthly strategic meetings and our weekly tactic meetings, we look at the dashboards and use that information that’s there. That’s why we collect it. It needs to be actionable.”

-Karl Hedstrom, **NTEN**

CREATE AN ACTION PLAN



CREATE AN ACTION PLAN

Who will you need to get on board?



What processes will need to be defined?



What do you need to budget for?

IT TAKES A LOT OF WORK

Even if you're the strongest advocate for strategy adoption, it will take more than just one person to get off the ground.





WHO SHOULD BE INVOLVED?

Make sure you have executive buy-in and oversight.

Include those that will be affected by the change.

TALK TO YOUR STAFF

Who might become a barrier if they aren't included?





HOW DO YOU HELP PEOPLE BUY IN?

You'll need to appeal to both
the head and the heart.

ASSIGN ROLES

Make certain that everyone knows what their job is and that they are capable of doing it.





WHAT NEEDS TO BE DEFINED?

- Do schedules need to be made?
- Roles need to be assigned?
- Processes need to be brainstormed?

WHAT NEEDS TO BE BUDGETED FOR?

For example:

- A survey tool
- A bar code scanner
- A new staff member
- A consultant





WHAT NEEDS MORE THOUGHT?

What parts of your strategy do you need to reflect further on? Have a meeting about? Bring someone in from outside of your organization about?



ADDITIONAL CONSIDERATIONS

POLL

Do you need to regularly share data with funders or other external partners?

A. Yes, quite a few

B. One or two

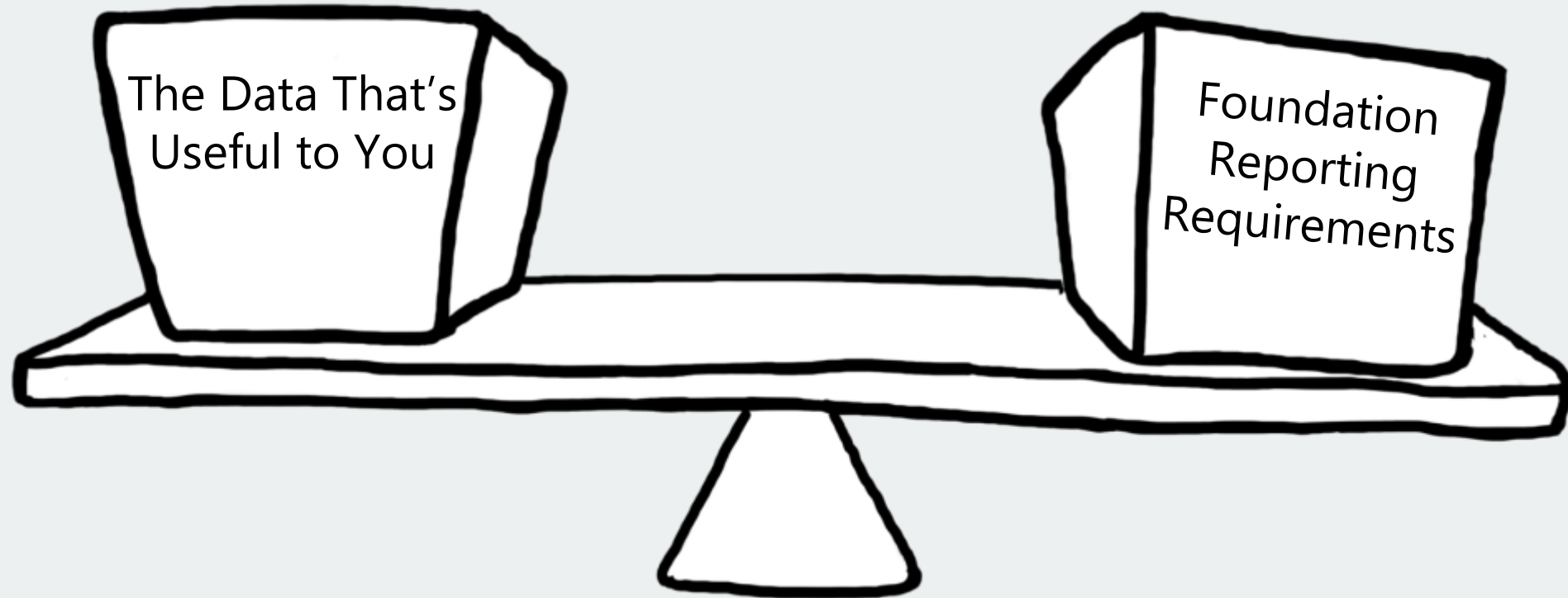
C. No

D. Not sure



FIGURE OUT YOUR BALANCE

Compare your foundation requirements with your own needs. What matches up? What's different?



WHERE ARE YOUR PRIORITIES?

- Where do you need the most help?
- What is easy to accomplish?
- What can get you the biggest return?
- What do you deem to be most important?





CHARITY NAVIGATOR
Your Guide To Intelligent Giving



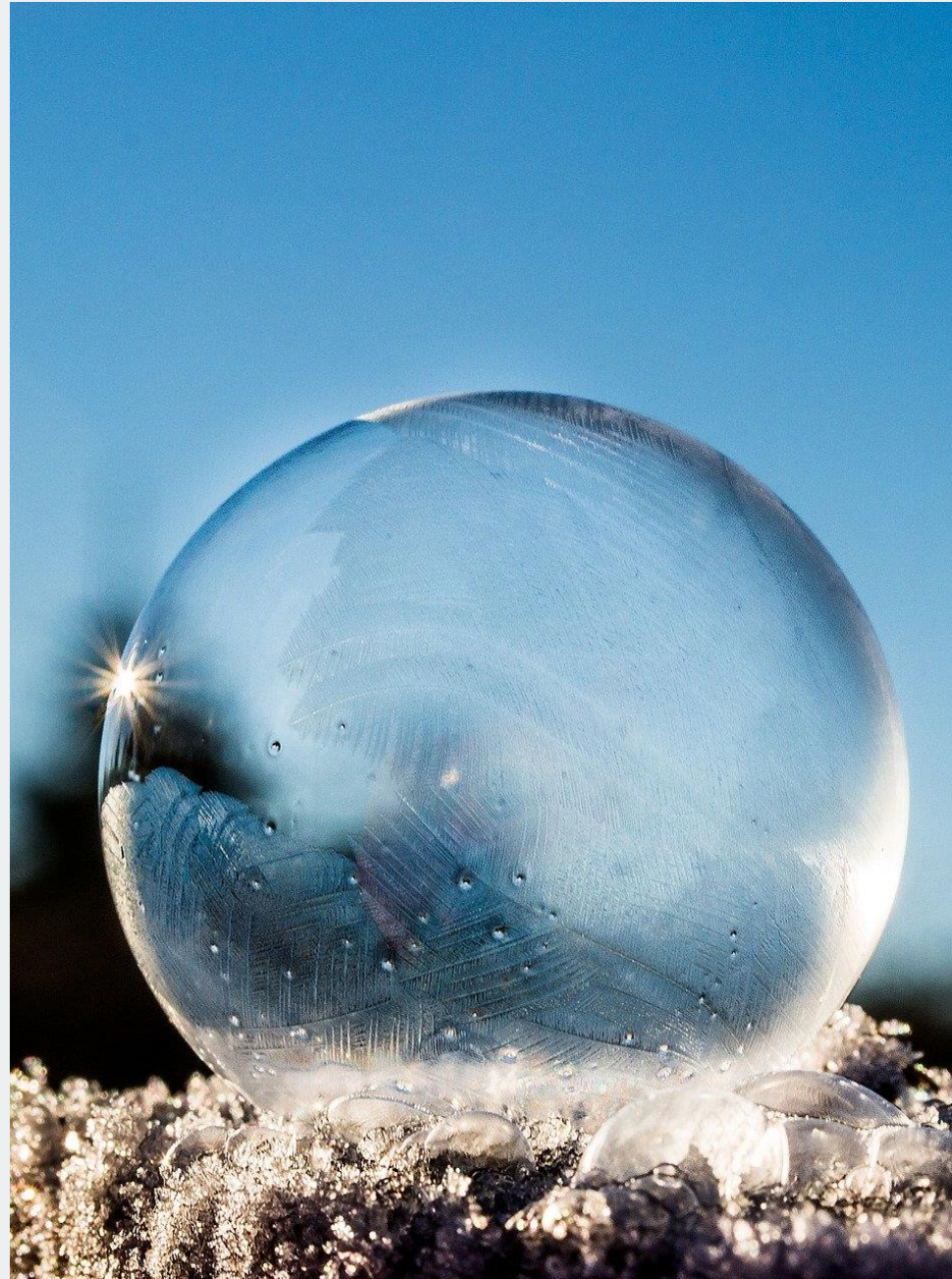
GUIDESTAR®

WHERE ELSE WILL YOUR DATA APPEAR?

Charity Navigator and GuideStar report on nonprofit success by looking at program and financial data.

TRANSPARENT DATA

A growing trend for nonprofits is to be more transparent about their data.



A photograph of a modern classroom or study area. In the center, a man in a yellow jacket sits at a wooden desk, gesturing while talking to a woman in a white shirt and tan scarf who is standing. They are looking at a computer monitor. To the left, the back of a woman with red hair is visible. To the right, the back of a woman with dark hair is visible, sitting at another desk. The room has a red brick wall, a large window with black frames, and a radiator. A green banner is overlaid at the bottom.

COLLEGE SPRING—A CASE STUDY

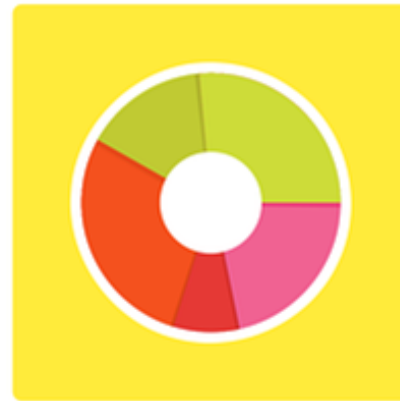


COLLEGE SPRING

- 25 full-time staff
- Locations in CA and NY
- Has served more than 11,000 students since 2008

A COMMITMENT TO DATA

They hired a Director of Research and Evaluation to develop and run its data program.



A FOCUS ON SAT SCORES

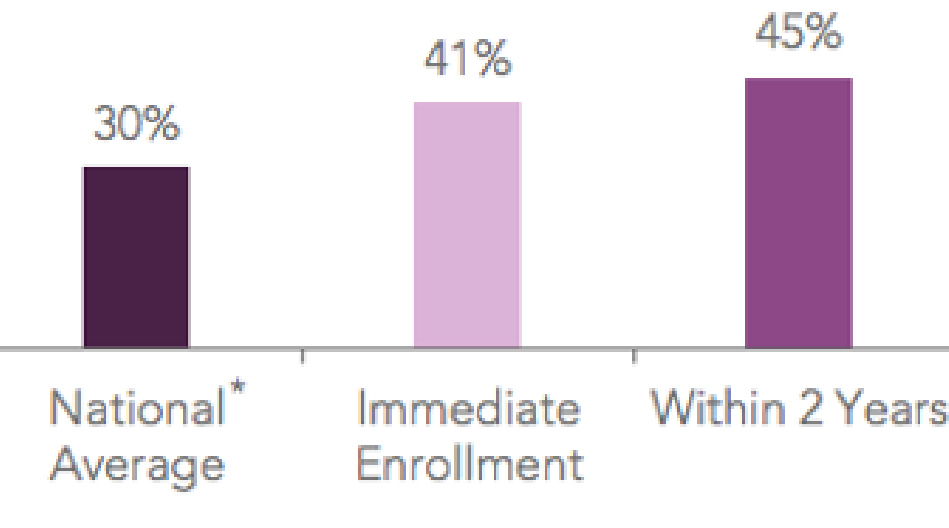
The team felt it was working with a powerful idea—SAT scores as a path to educational success—but wanted to test its assumptions.



Image: <https://sat.collegeboard.org/about-tests>

MATCHING METRICS TO MISSION

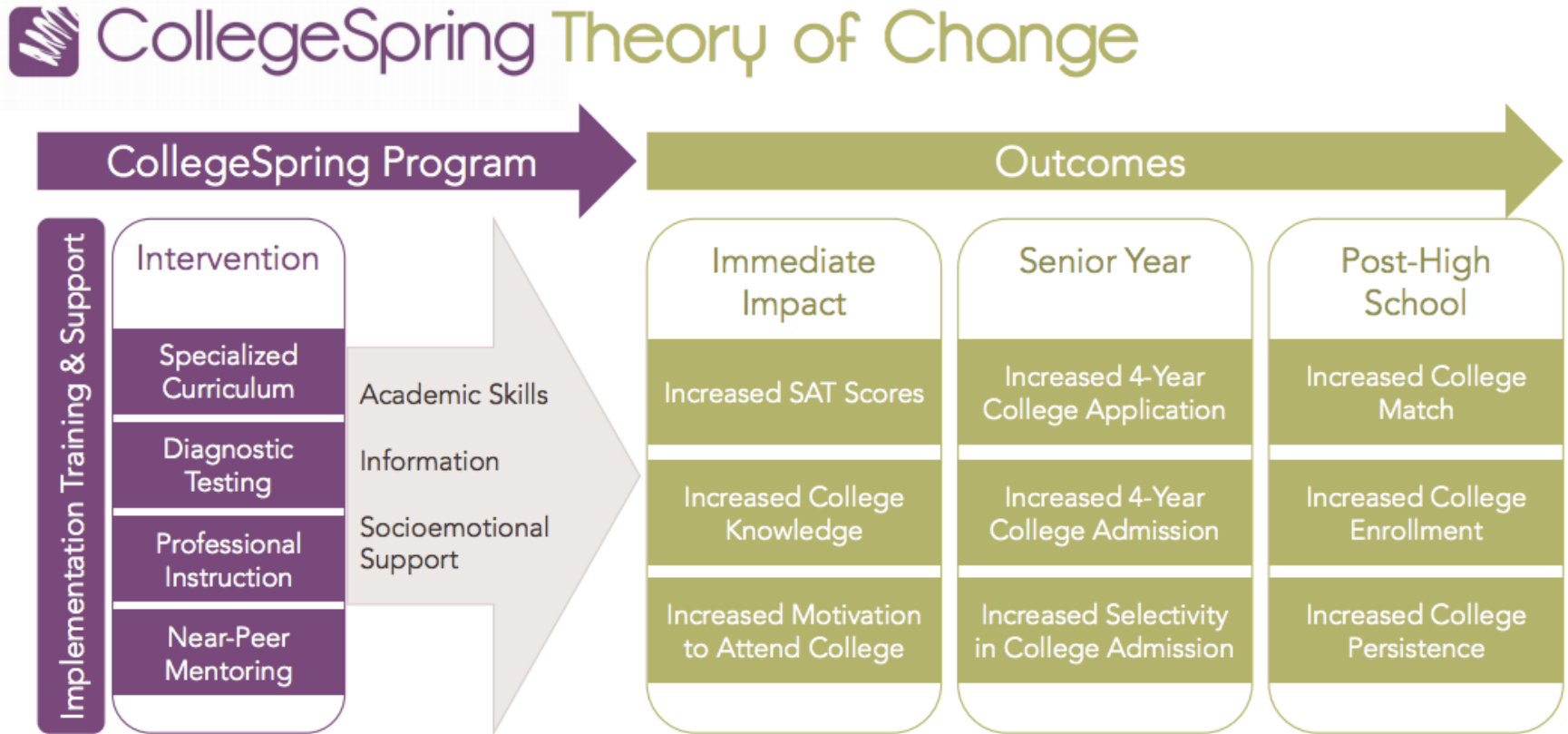
4-Year College Enrollment Rates



It looked closely at how programs affected SAT scores and developed metrics to test the links between SAT improvements and college success.

MISSION DOWN APPROACH

Based on its founding values and early data, the organization developed a detailed Theory of Change.



CORE METRICS

CollegeSpring developed core metrics based on:

- Activities
- Program Satisfaction
- Reach/Participation
- Initial Success
- Long-Term Impact



IT ALSO USES OPEN DATA

CollegeSpring uses National Student Clearinghouse data to measure its impact once students go off to college.



DATA EXCHANGE services

TECHNOLOGY

CollegeSpring uses various technology tools to collect, store, and analyze data.



EXPERIMENTATION

At times, CollegeSpring takes a “bottom-up” approach.



VALIDATION

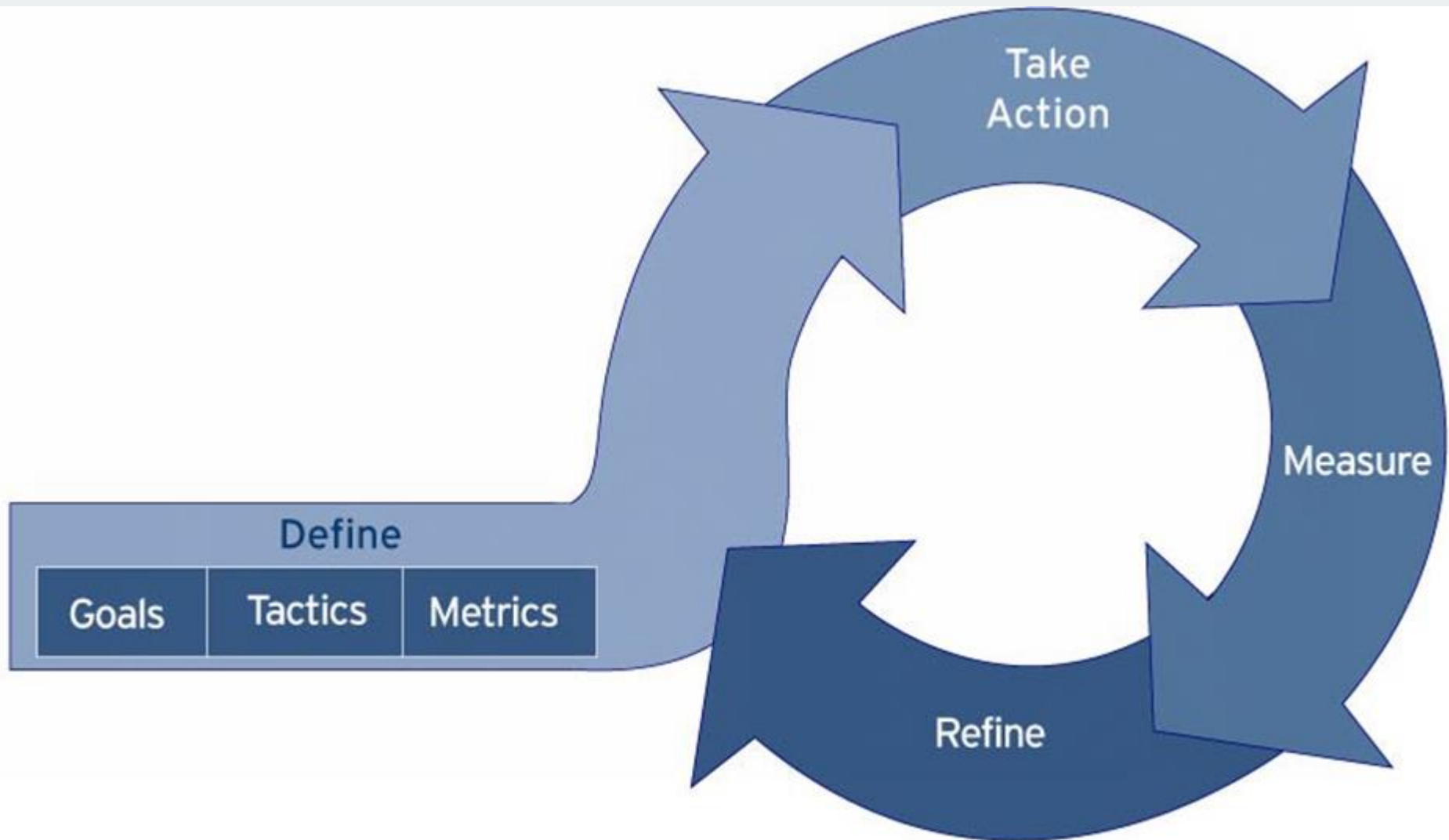
CollegeSpring feels that its approach has been validated by the data it's collected.





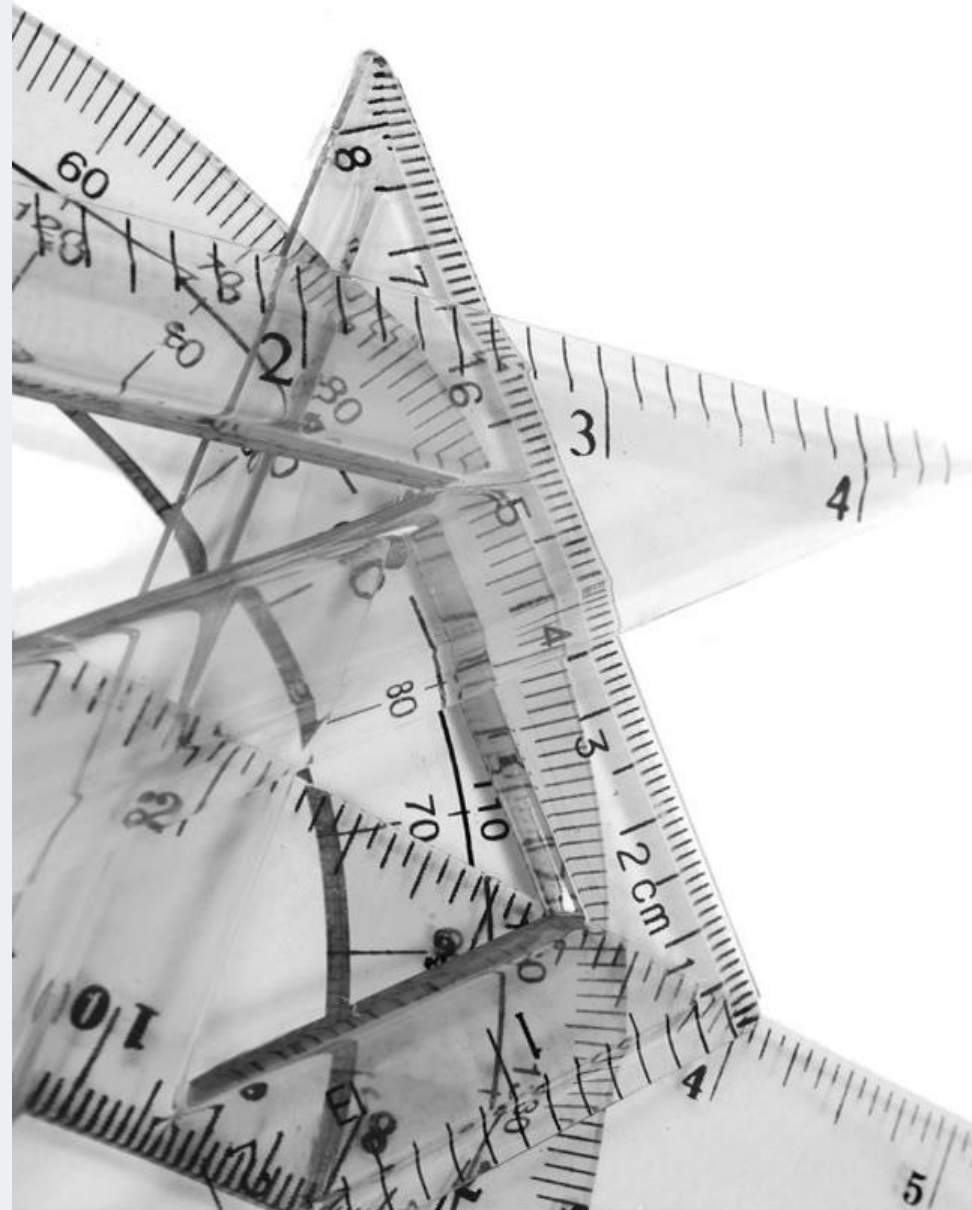
DESIGNING A PROCESS FOR SUCCESS

THINK OF METRICS AS A CYCLE



IT'S HARD TO IMPROVE WITHOUT MEASURING

You can't reliably improve
unless you track and tweak.



MAKE TIME TO MAKE CHANGES

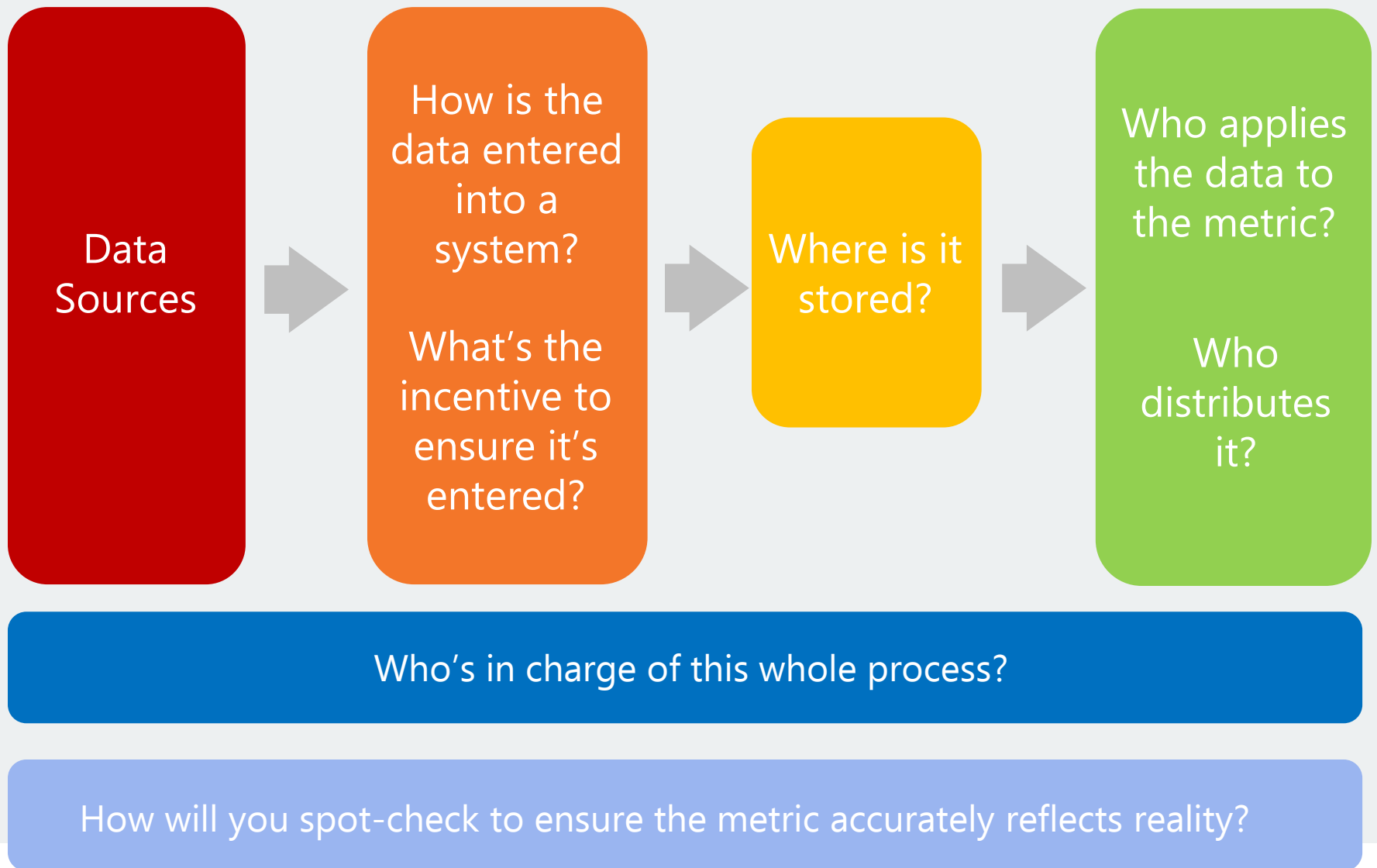


WHERE CAN YOU START?

Find a small piece you can break off and do right now.



THE CREATION PROCESS



PUTTING THE METRICS TO WORK

How frequently will you create the metrics?

Who will they be distributed to?

In what meetings will they be used?

What decisions shouldn't be made without them?

How frequently will you plan to adjust your actions based on what the metrics say?

CREATE AN ACTION PLAN

Who will you need to get on board?



What processes will need to be defined?



What do you need to budget for?

MAKE A SNOWBALL... START AN AVALANCHE





Homework

What will you do to help your organization make more data-centered decisions?



QUESTIONS?

Next Course

Digital Fundraising in 2020

June 11, 18, & 25, 1 – 2 PM EST

Register at: <https://bit.ly/DigFund2020>

PROMO CODE FOR 20% OFF:

DATABEGINNERS20

A photograph of a man and a woman in an office. The woman, on the left, has long dark hair and is wearing a striped shirt. The man, on the right, has short hair and is wearing a grey blazer over a brown shirt. They are both smiling and looking at a laptop on a desk. A third person's arm is visible on the right side of the frame. The background shows a window with a view of a city.

THANK YOU

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Liora Lebowitz: liora@techimpact.org

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