



Nonprofit Data for Beginners

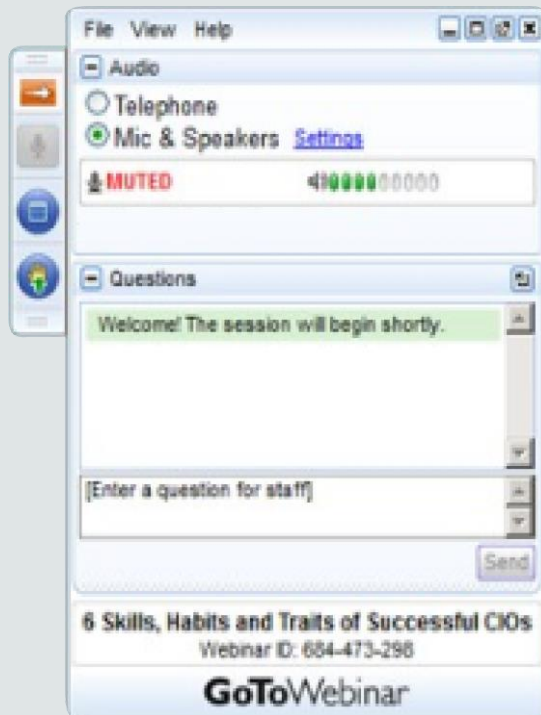
Asking the Right Questions

May 7, 2020



INTERFACE GUIDE

CONTROL PANEL



Control panel options may vary slightly depending on webinar configuration.

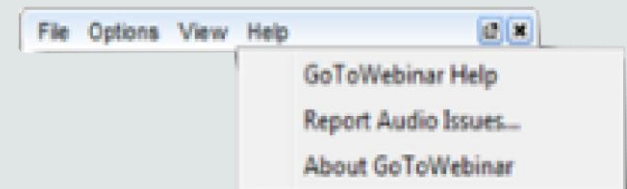
AUDIO PANEL

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.

**WE'RE A NONPROFIT ON A
MISSION TO USE
TECHNOLOGY TO BETTER
SERVE THE WORLD.**



We do this by delivering tech services, education, and training that help nonprofits and communities thrive.



NONPROFIT TECH SERVICES:

- Managed IT Support
- Cloud Services
- Strategic Consulting
- Security & Compliance
- Data Support
- Machine Learning & AI
- Community Integrated Design



WORKFORCE DEVELOPMENT:

ITWorks & CXWorks: Free IT and Customer Experience training programs

PunchCode: 12-week immersive programming bootcamp



NONPROFIT EDUCATION & TRAINING:

- Reports
- Consumer Guides
- Assessments
- Workbooks & Articles
- Online Training
- Free Webinars

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](#).

Nonprofit Beginners

This course
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ERIC LELAND

Founder and Director of FivePaths

Pronouns: He/His



Eric Leland has spent that 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 platforms development expertise to each project.

CINDY EBY

Founder and CEO, ResultsLab



I am a disruptor when it comes to evaluation in the social sector, applying more than 20 years of international experience in guiding nonprofit organizations to build their capacity for using data. I graduated from the University of Denver with a Master's Degree in Sociology in applied research, and my career experience has included leadership and advisory roles with organizations such as the Nurse-Family Partnership, Grantmakers for Effective Organizations, Mile High United Way, and the Center for Health Policy Research.



COURSE SCHEDULE

May 7: Asking the Right Questions

May 14: Hunting Down the Data

May 21: Making Use of Your Data

- 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.



HOMework

You will be asked to do approximately one hour of work on your own each week.



WHAT WE'LL COVER TODAY:

- How Can Data Help You?
- Tracking Organizational Health
- Quantifying from the Top Down
- Starting from the Bottom Up
- Meeting Foundation Expectations
- Some Final Tips

- All attendee lines will remain muted
- Please connect to audio by dialing in (toll) or by using your computer speakers (VoIP Toll Free).
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- We are recording today's presentation and you will be sent a link to the webinar recording
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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 seen in profile, looking towards the women. They are all seated at desks with computers. A small potted plant is visible on the desk in the foreground. A blue banner with white text is overlaid on the bottom left of the image.

**HOW CAN DATA
HELP YOU?**

DATA SHOULDN'T BE MYSTERIOUS

Even uncomplicated data can be a huge help.



DON'T FOCUS ON THE TERMS

- Outcome measurement?
- Analytics?
- Impact Assessment?



TWO DIFFERENT TYPES OF DATA METRICS

- Organizational Health Metrics
- Program Metrics

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



HOW DO YOU DECIDE WHAT TO DO?



TO CHOOSE THE MOST EFFICIENT TACTIC

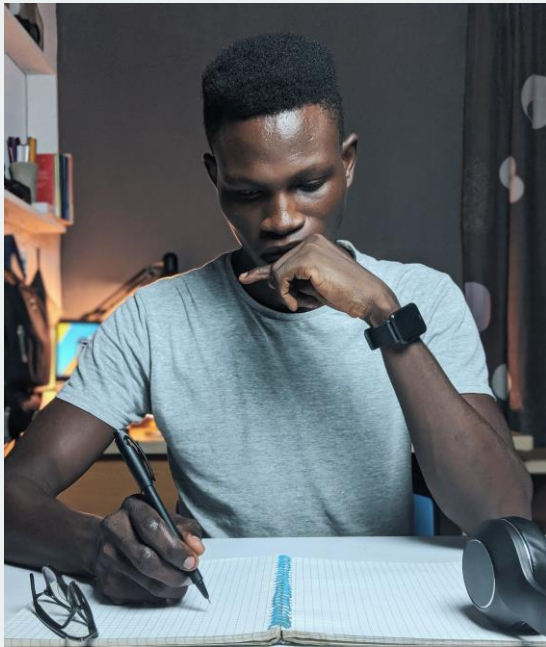


"If we advertise in 87 places, something ought to work... right?"



"We know what channels work best to reach our audience."

DATA CAN SHOW YOU *WHEN* TO DO THINGS



"Does it matter what night of the week we do our volunteer night?"

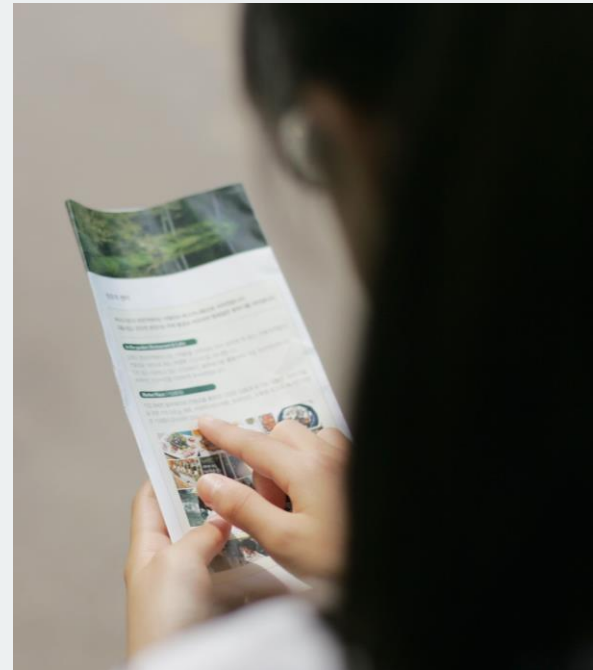


"Based on our past volunteer nights, Tuesdays and Wednesdays consistently get the most turnout."

DATA CAN SHOW YOU *HOW* TO DO THINGS



"Dancing on the corner should be a great way to raise money."



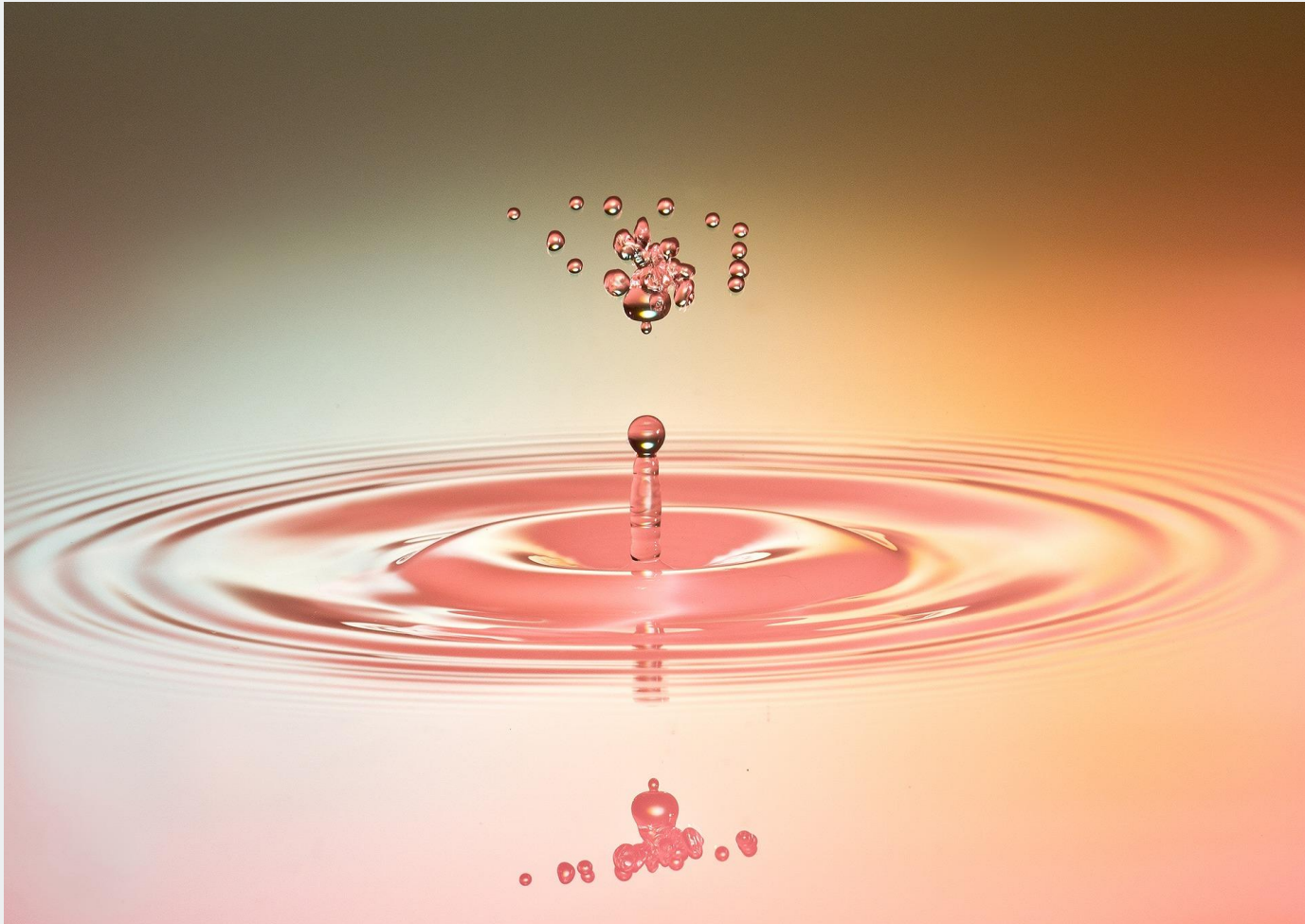
"Based on past results, we know that including photos of our children's programs boosts the number who donate."

DATA CAN TRACK IMPLEMENTATION

How well did we
implement our tactics?



DATA CAN TRACK IMPACT



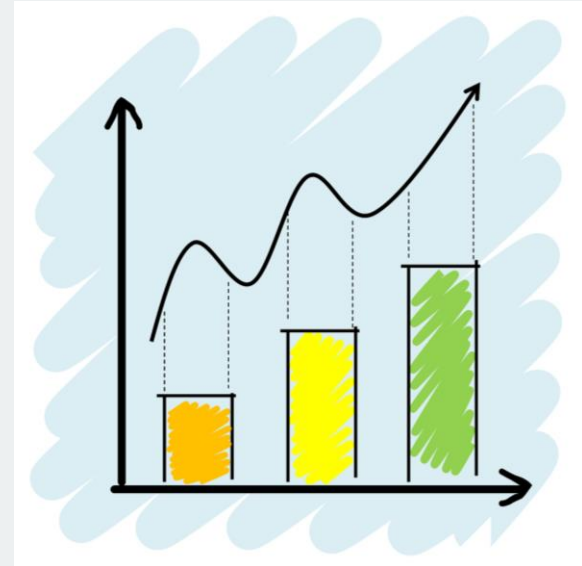
DATA CAN SERVE AS A WARNING SYSTEM



DATA CAN HELP SHOW YOUR SUCCESS



"Our services are critical to the community and deserve funding."



"Our programs resulted in 10% more students graduating from high school."

DATA FOR COMPLIANCE

What do our funders require us to measure?



INTO THE CHAT

What are the key reasons you want to do more with data?



BUT HOW?

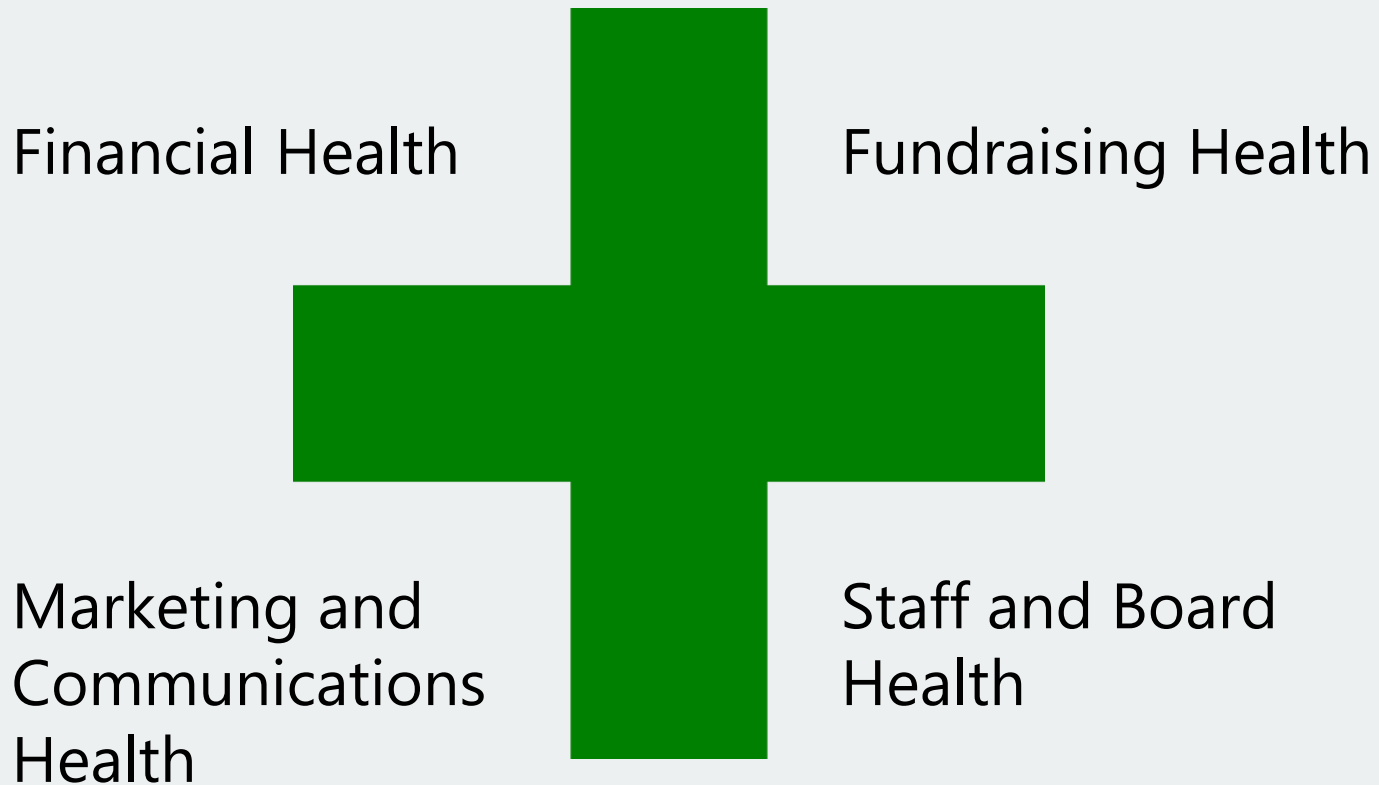
So, yes, data is valuable and important—but how do you know what to track? How do you use it to show your effectiveness?





TRACKING ORGANIZATIONAL HEALTH

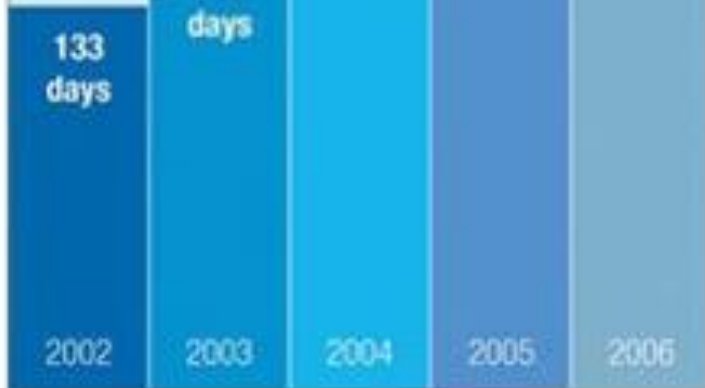
CONSIDER ORGANIZATIONAL HEALTH



Days cash on hand

FINANCIAL HEALTH: DAYS OF CASH

How many days could you operate with just the cash you have in the bank?



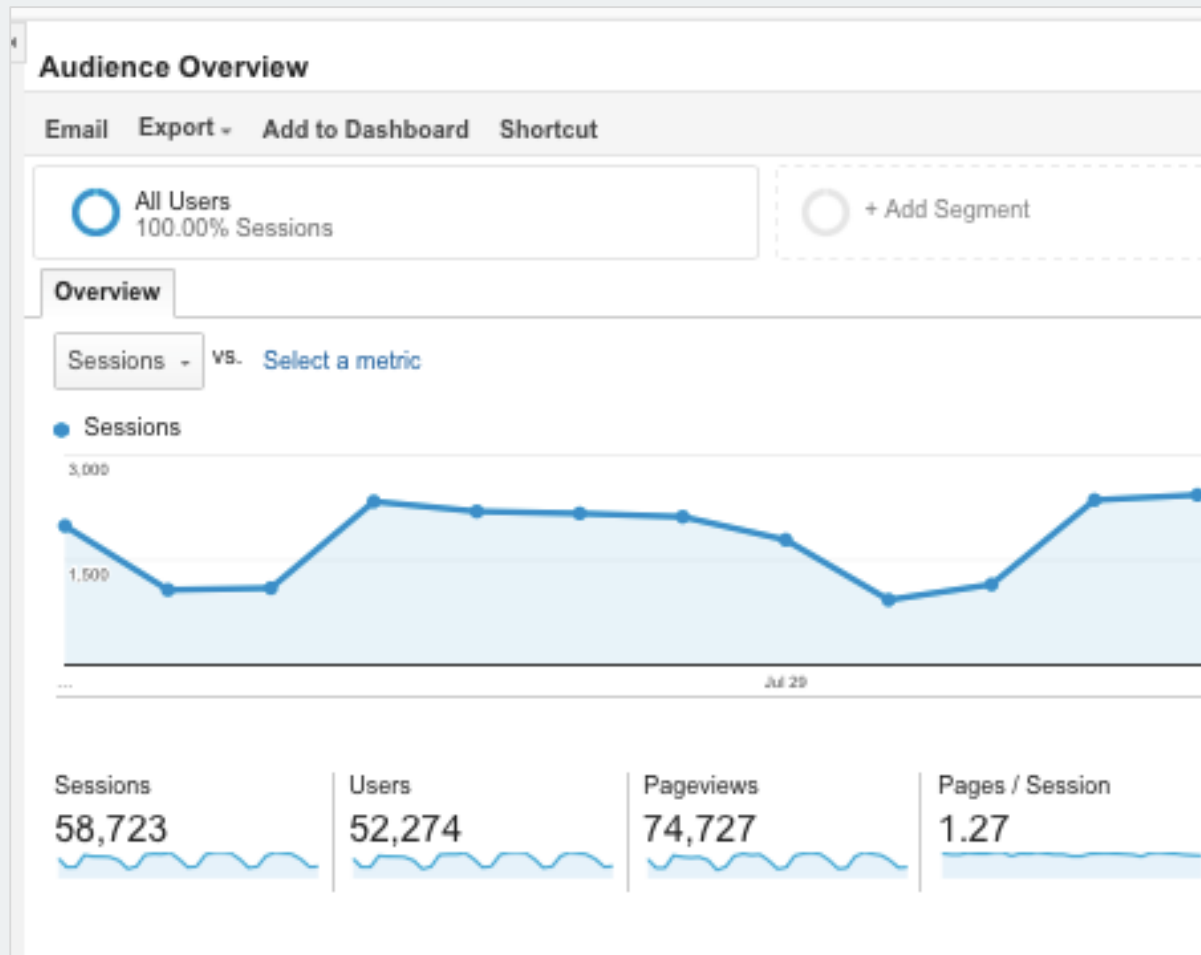
Days cash on hand is a key indicator of a health care organization's financial strength.

FUNDRAISING HEALTH: DONOR COUNTS

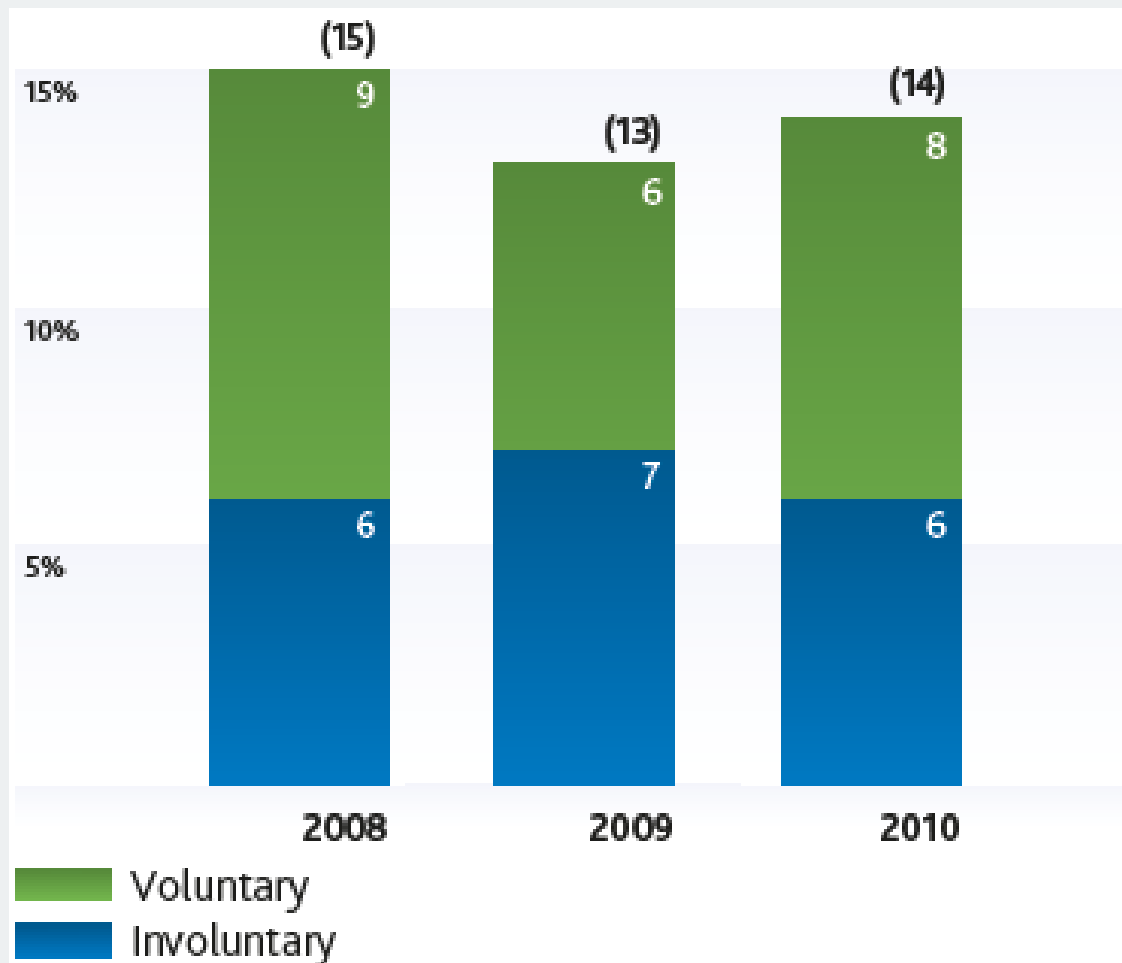
- Total Number of Donors
- New Donors
- Returning Donors
- Some Year But Unfortunately Not This Year (SYBUNT)



MARKETING HEALTH: CONSIDER REACH



STAFF AND BOARD HEALTH: CONSIDER TURNOVER



INTO THE CHAT

What other types of organizational health metrics would your organization benefit from tracking?



A man and a woman are looking at a whiteboard. The man is holding a blue marker and pointing at a diagram on the board. The diagram shows a flow from 'PROJECT' to 'DESIGN' and then to a box containing three wavy lines. There are also some sticky notes on the board, including one that says 'interactive text'.

DATA FOR PROGRAMS: A TOP DOWN APPROACH

A LENS FOR THINKING ABOUT PROGRAM DATA



START WITH A “FUZZY” GOAL

- “Improve dental health in nursing homes.”
- “Develop more youth leaders.”
- “A river that’s fishable and swimmable.”



DEFINE YOUR TERMS

Take anything that's not clear and countable and break it down to something that's tangible.



AN EXAMPLE



So let's say:

- Pairing up volunteers with [specific types of] environmental organizations to complete at least 20 hours of work over six months.
- To improve these organizations' internal ability to handle finance, technology, HR, or marketing issues on their own.



AND THEN BRAINSTORM

If we want to know:

Have organizations improved their ability to handle financial issues?

What are ways we could measure that?

AN EXAMPLE



So let's say:

- Youth are 14-18 year olds.
- Develop leaders means they've completed some desired milestone demonstrating leadership.



AND THEN BRAINSTORM

If we want to know:

How many youth have completed a milestone demonstrating their leadership

What are ways we could measure that?

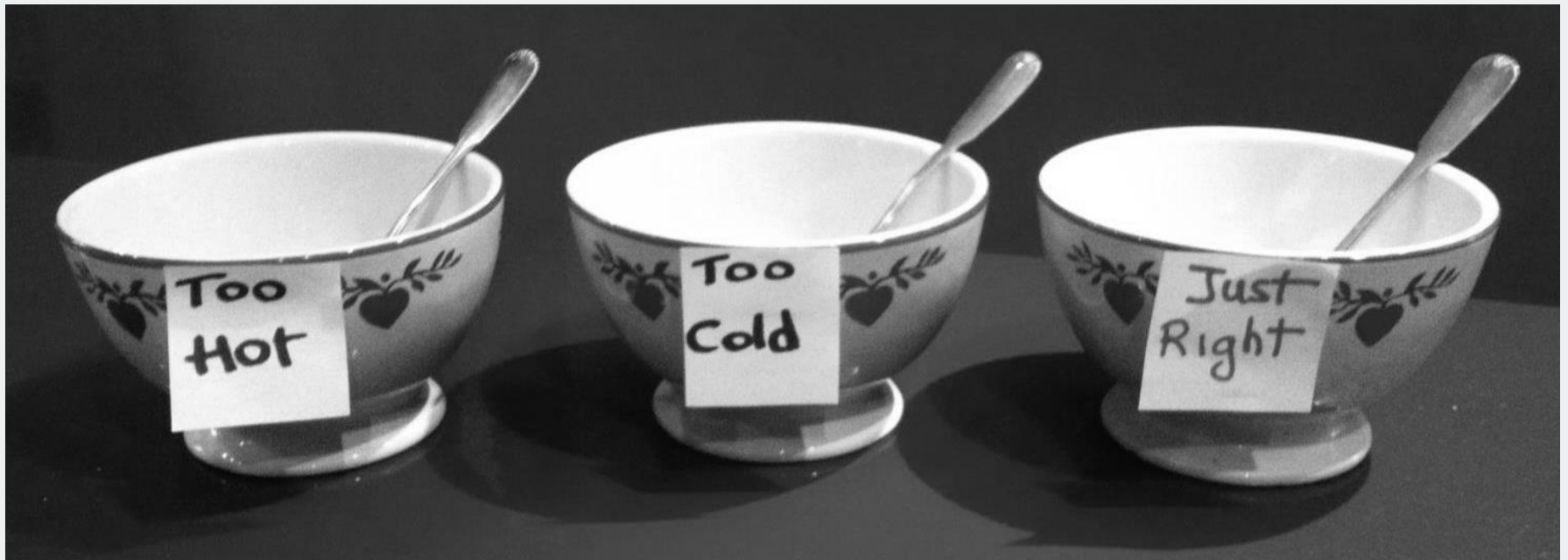
THINK ABOUT “PROXY” MEASURES

What things can you measure that are a reasonable proxy for your fuzzy goal?



EVERYTHING'S A PROXY

Nothing can be perfectly measured. You can only pick things that are related and make a logical case for why it's a good proxy.





CAN YOU TIE ONE THING TO ANOTHER?

For instance:

- Patrons who attend a show are more likely to donate.
- Those who have job training are less likely to end up homeless.

DO RESEARCH STUDIES EXIST?

For instance, if it's already been shown that increased awareness leads to increased action, then you just need to show awareness.



CASE STUDY: YMCA OF METRO CHICAGO

Step 1: Start with your mission—often a very fuzzy goal.

Help middle school children go on to live “fruitful lives” after participating in the program.

But, um... how on earth do you measure a “fruitful life”?

CASE STUDY: YMCA OF METRO CHICAGO

Step 2: Define your mission goals in a way that they're at least somewhat tangible and logically connected.

What does a "fruitful life" mean?
Let's define it as children who
go on to have jobs that provide
them with a living wage.

But they're middle school students—even if we could find out if they have jobs, we can't possibly track them for so long.

CASE STUDY: YMCA OF METRO CHICAGO

Step 3: Research shows those that high school graduates are much more likely to have living wage jobs.

Measure how many children go on to graduate high school.

But that still means we'd need to track them for five years or more to find out.

CASE STUDY: YMCA OF METRO CHICAGO

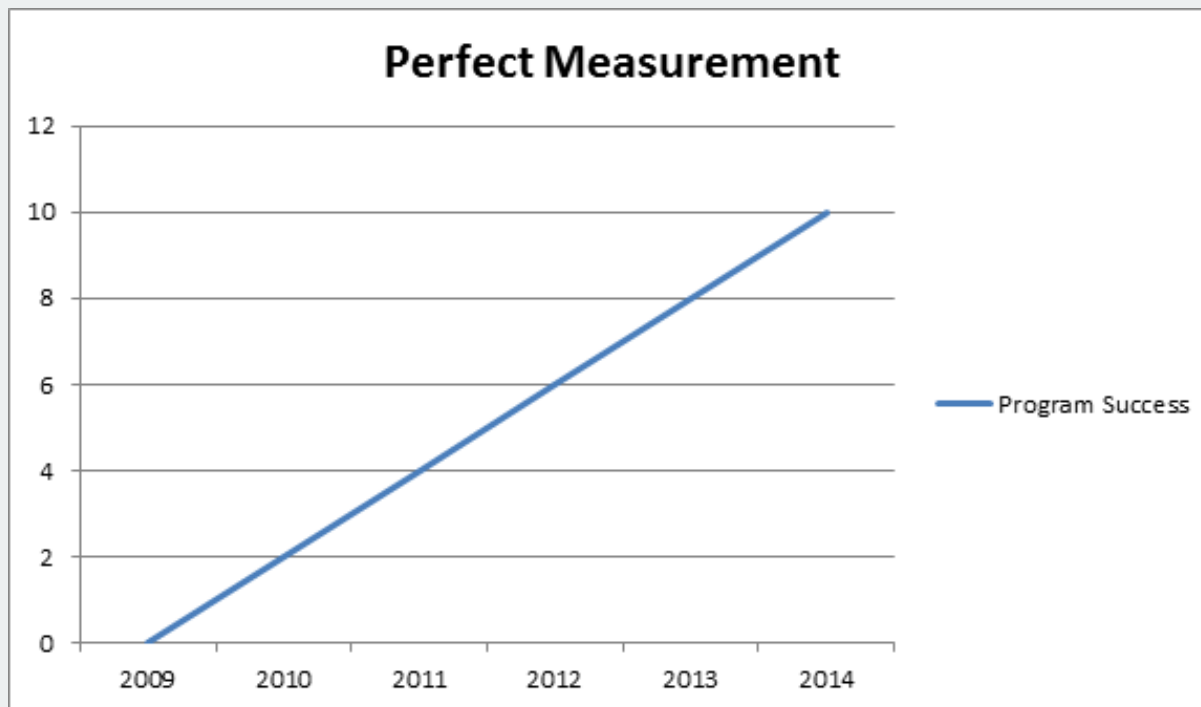
Step 4: Research shows that those on track in middle school are much more likely to graduate from high school.

Measure the number of program participants who are on track with middle school grade requirements compared to the average.

Now we've landed on something that is fairly easily measurable.

PERFECTLY IMPERFECT


This still isn't a perfect measurement. What if all your students later go on to do a different program? Or those willing to participate self-selected to begin with? That's the nature of program measurement.



INTO THE CHAT

Who wants to offer a fuzzy goal?





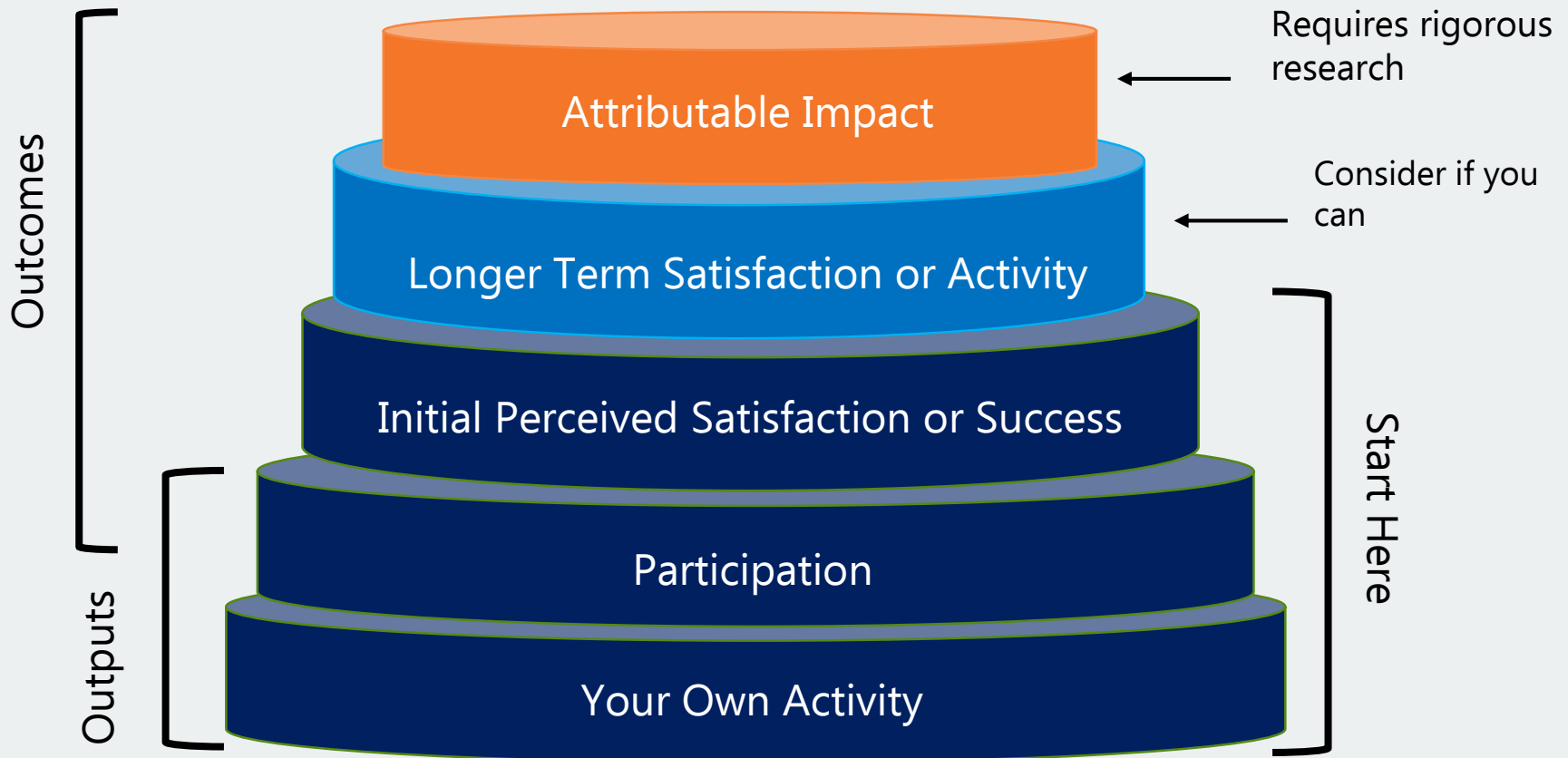
PROGRAM DATA: STARTING FROM THE BOTTOM UP



HOW DO YOU KNOW WHAT'S MEASURABLE?

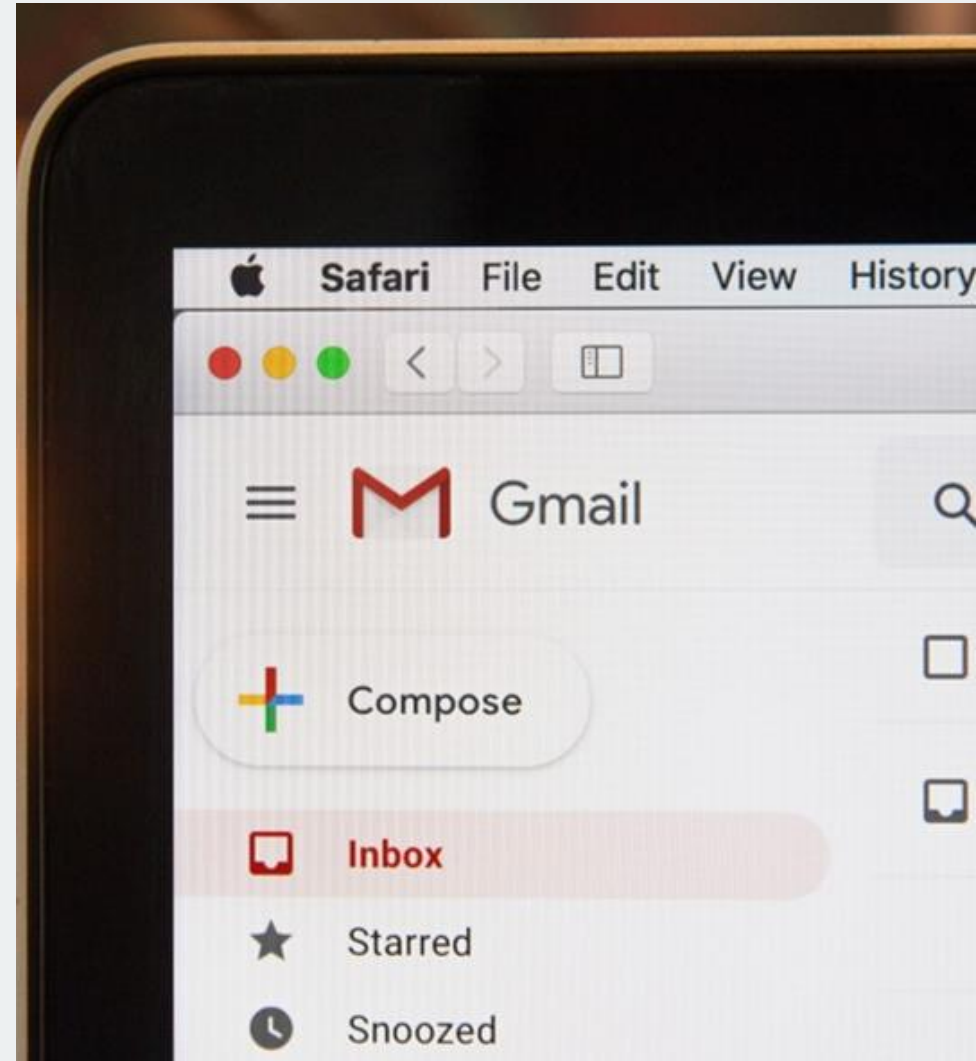
We've just worked through a top down approach. Let's take a look at what happens when we go bottom up.

THINKING ABOUT PROGRAM METRICS



YOUR OWN ACTIVITY

- Number of houses canvassed
- Twitter posts per week
- Number of emails sent



THINKING ABOUT PROGRAM METRICS





ATTENDANCE AND PARTICIPATION

- Number registered
- Percent who finished the program
- Number who attended a session
- Number of calls to helpline

VIEWS

The number of people who look at your resources.



Video views



Facebook page
views



Website page views



Clicks on a Bit.ly
link

FOLLOWERS

The number of people who choose to follow the information you provide.



Twitter followers



RSS subscribers



Facebook fans

THINKING ABOUT PROGRAM METRICS



INITIAL SATISFACTION

- Number who agreed that the training was useful
- Number who felt counseling was worthwhile
- Number who said their question was answered

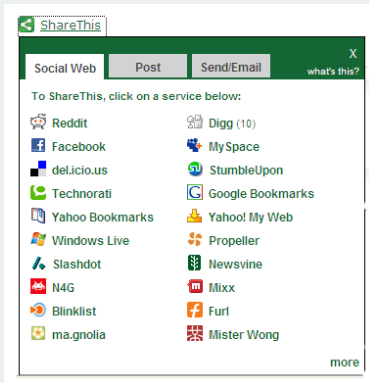


ENGAGEMENT

The number of people who engage with you.



Online mentions



Forwards



Retweets

CONVERSION

Are people actually doing things that help your organization?



Buying tickets



Volunteering



Donating



Signing up for classes

THINKING ABOUT PROGRAM METRICS



LONGER TERM ACTIVITY OR SATISFACTION



I Feel Better



I Stay Calm



My Anger & Frustration
is Reduced



My Sleep
is Improved



My Focus
is Improved



My Stress & Worry
is Reduced



My Mood
is Improved

TOTAL STUDENTS

7,333

TOTAL COURSES

28

TOTAL SCHOOLS

18

DATES

10/08 – 2/11

RELIABLE FRIENDS

Those you can rely on to donate, fundraise, or help spread the word.

- Repeat donors or community fundraisers
- Twitter partners



THINKING ABOUT PROGRAM METRICS



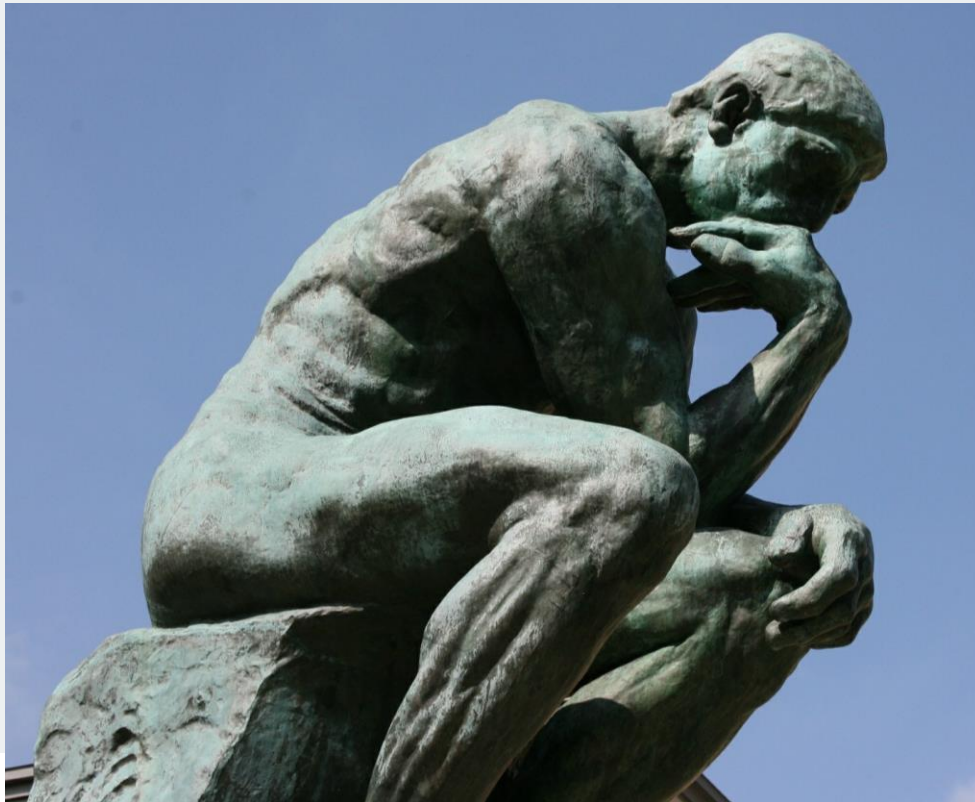


ATTRIBUTABLE IMPACT

Trying to find attributable impact—as opposed to change caused by other factors, or that would have happened anyway—is often rigorous, expensive, out of the reach of smaller nonprofits.

COUNT ON RELIABLE PROXIES

Unless you have trained researchers on staff who can study a question for years, you'll have to settle for reasonable guesses based on reliable proxies.



MEETING FOUNDATION EXPECTATIONS



MEASURE WHAT YOU'RE DOING

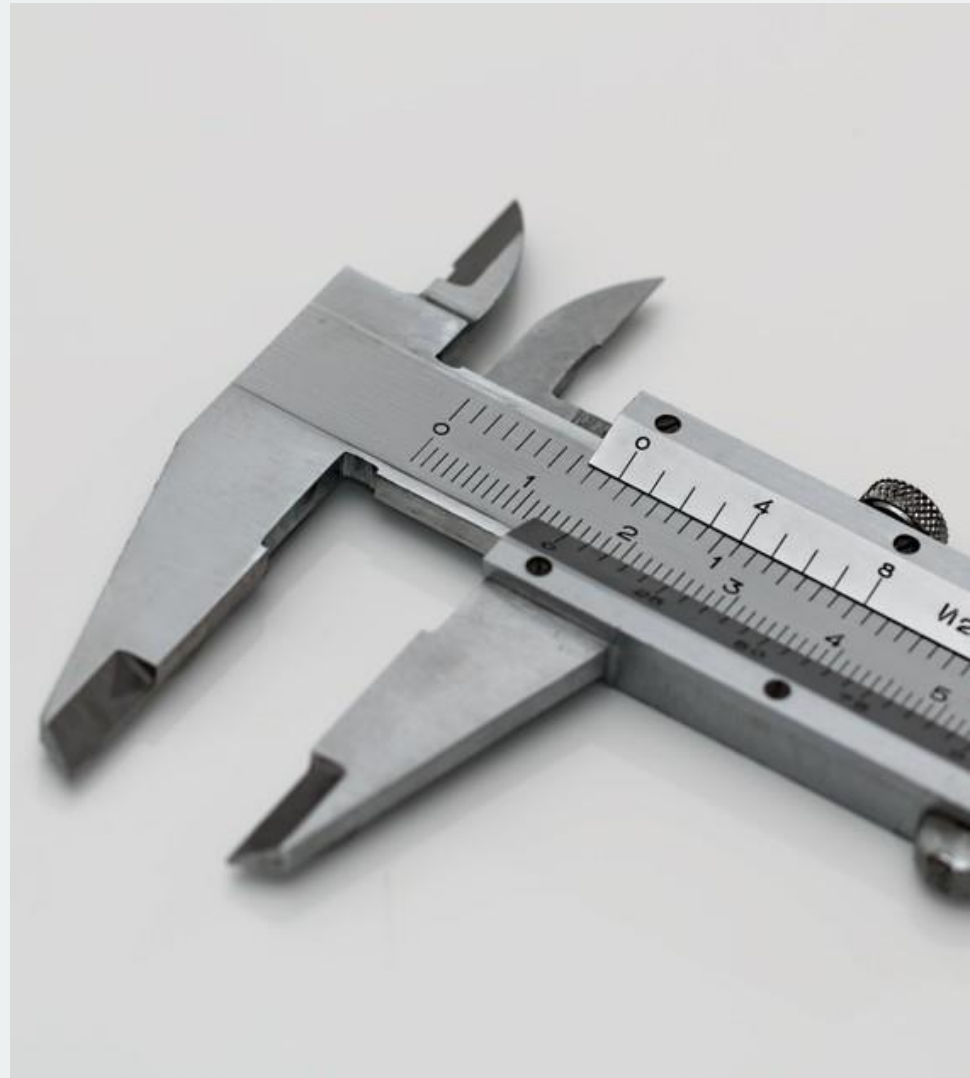
Some foundations will simply ask you how you're going to measure your program and leave the details up to you.

Make sure that you have a sensible plan.



PRECISE METRICS

Some will dictate precisely what measures they want—which at least makes it straightforward to define what's needed.



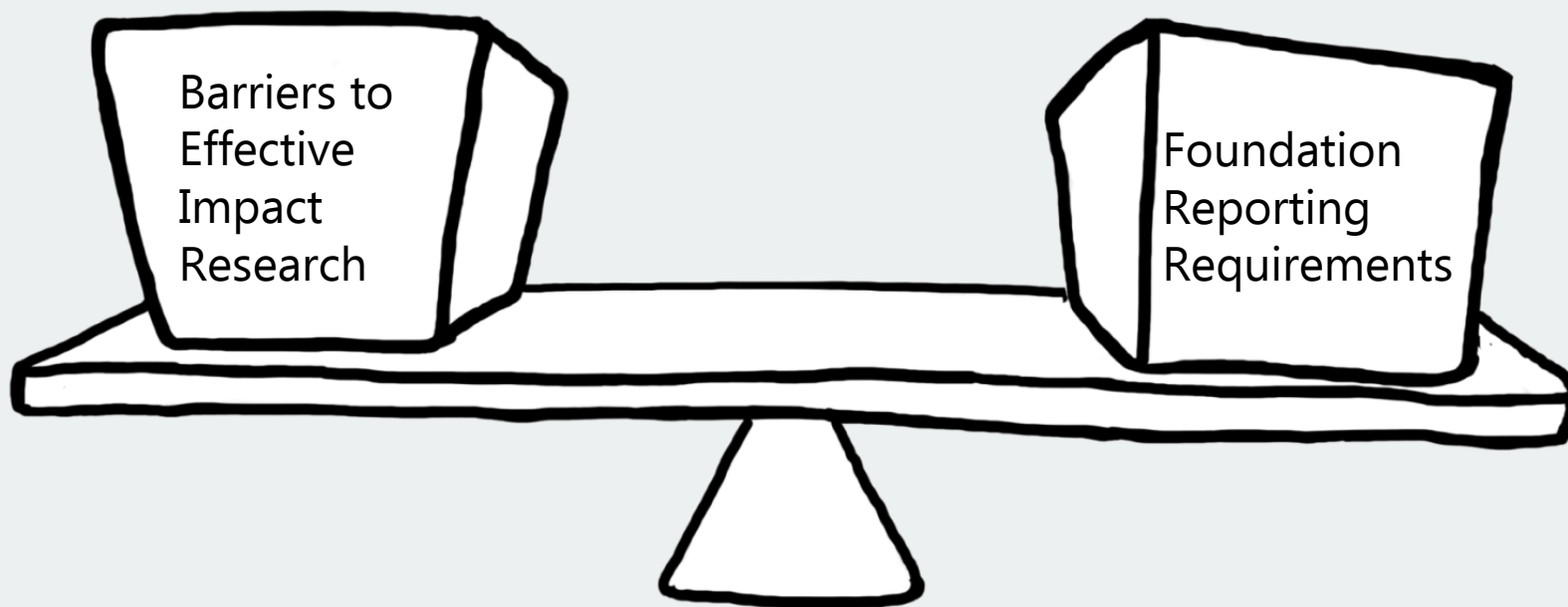
WHAT IF THEY ASK FOR IMPACT DATA?

This can be the hardest to navigate.



FIND THE RIGHT BALANCE

This can be the hardest to navigate.



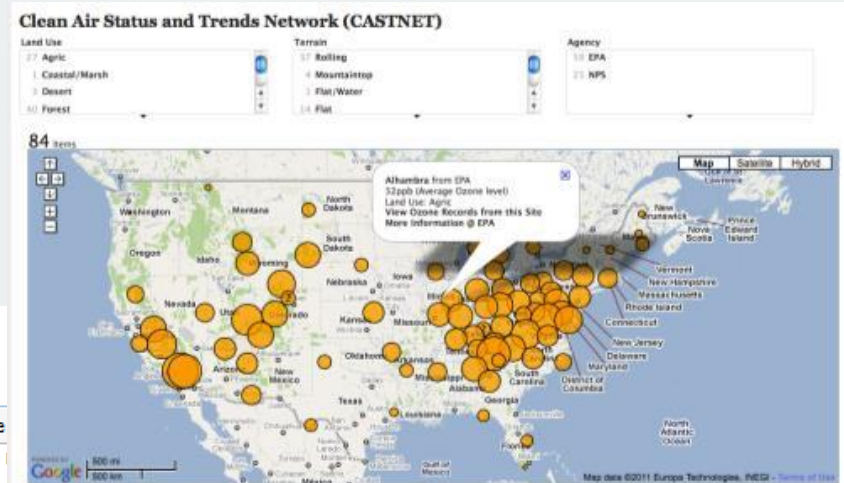
HAVE A CONVERSATION

First, check to make sure they really mean “attributable impact” as opposed to just “something more than participant data.” Many who ask don’t realize the ramifications.



YOU SHOULD COLLECT THE RIGHT DATA ANWAY

Even if foundations don't demand it, you should still collect data that's useful to you to improve your own program health and the success of your mission.



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will be called
a metric into

Today's Ratings

	Rating	Reason	Route or Line	Purpose
1	6	Helpful/Friendly Staff	Bus - 36	Private/Other Schools
2	3	Plenty of Seats	Bus - 77	Work
3	2	Vehicle was Late	Bus - 36	Errands or Appointments
4	5	On Time	Bus - 52	Work
5	5	Helpful/Friendly Staff	Light Rail	Errands or Appointments
6	4	Quiet/Comfortable Ride	Bus - 48	Work
7	6	On Time	Paratransit	Work
8	6	On Time	Bus - 54	Errands or Appointments

01:42:19 PM
01:37:09 PM
01:14:32 PM
01:11:03 PM
12:35:51 PM
12:12:01 PM
11:50:14 AM

embedding! since we can embed a hard problem
even G , for which we can solve the problems easily
focus on embedding of graph metrics into trees in
dings with distortion. it is hard to get metrics



SOME FINAL TIPS

HOW DO YOU SHOW YOU'RE EFFECTIVE?

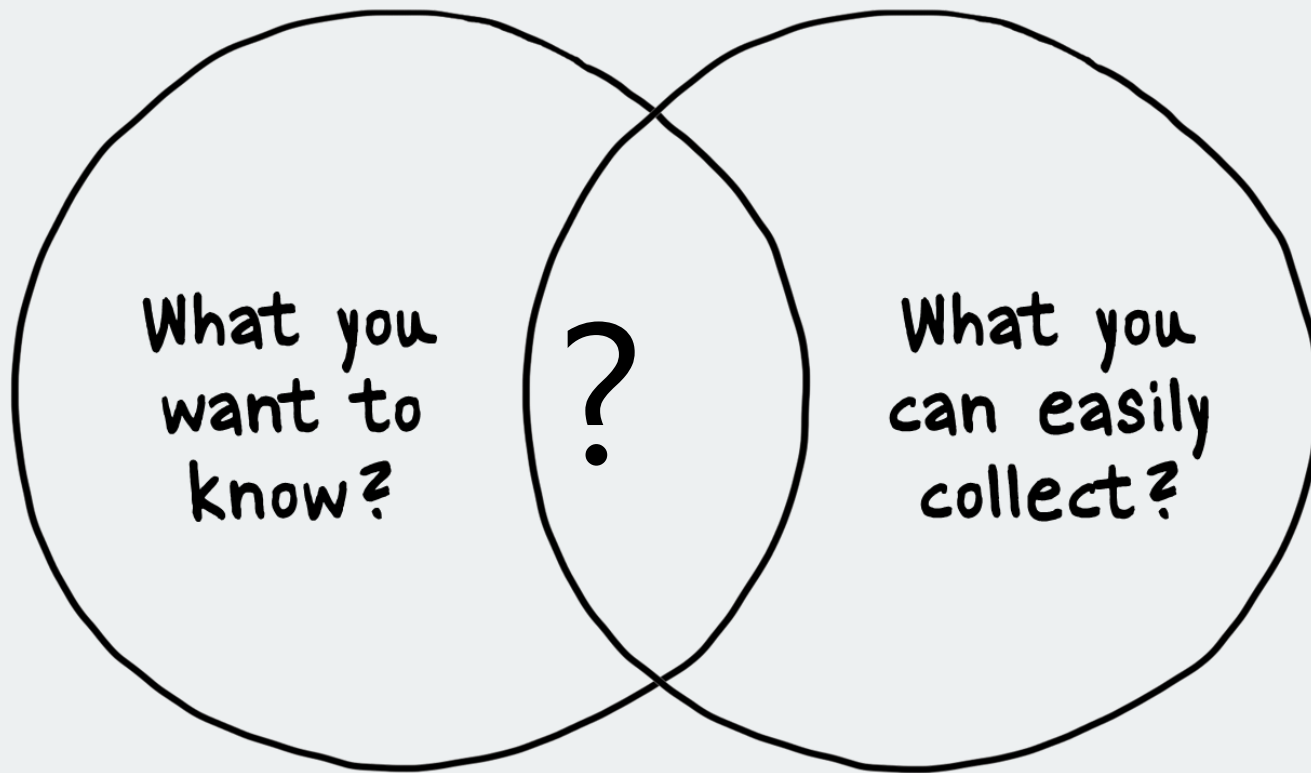




DEFINING ACTIONABLE METRICS IS ALWAYS HARD

The things you want to measure may seem dauntingly unanswerable, but EVERYONE's goals do at first.

YOU NEED TO BALANCE DESIRE WITH PRACTICE



WHAT'S MOST RELEVANT FOR YOU?

What are the key reasons you want to do more with data? Ideally, how would you like to use it?



BUT WHAT ARE YOUR CONCERNS?

What are some drawbacks and concerns?





YOUR HOMEWORK

Get started on nailing down the definitions and proxies for one fuzzy goal.

- How would you define the terms you use?
- What proxies might be measurable?



QUESTIONS?

Next Session

Nonprofit Data for Beginners:
Hunting Down the Data

May 14, 2020, 1-2:30pm Eastern

TECHIMPACT CODE

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, smiling and looking towards the man. The man, on the right, has short hair and is wearing a grey blazer over a brown shirt, smiling and looking down at a laptop. A third person's arm is visible on the far right. The background shows a window with a view of a city.

THANK YOU

Colin Murphy: colin@techimpact.org

Liora Lebowitz: liora@techimpact.org

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