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GUIDE:

Maximize Your Data Collection Efforts

Information overload is a risk as grantmakers and grantseekers navigate their roles as collectors, analyzers, or data users. Finding out how others use data can be the key to setting your own strategy. In other words, don't reinvent the wheel! And working in partnership will ultimately strengthen the entire sector. Through communications with our grantmaker and grantseeker communities, we gathered some of the best examples and most valuable tips to help you dive in and maximize your data collection efforts.

For Starters:

Spend some time thinking about why you need the information and what you will do with it. It's not about the fact that you've collected the data or how much you have, but whether you have collected information that is valuable and beneficial to your organization and its stakeholders.

Talk to others as you develop your data collection strategy. We can learn a lot from our colleagues in other departments who are looking at the same issue from a different perspective. Clients or participants should be asked what is important to them. What are other nonprofits in your sector looking at? What about other funders? Ask them what they're looking for and why. How do board members and executive leadership want to use the information? Having these conversations ahead of time can help inform your process.

Shift your perspective from using data solely to answer today's questions to also investing in solutions for tomorrow. Have measurable, specific goals in mind and identify tangible indicators to help track progress over time. Smaller steps can keep things simpler, make feedback in areas that need attention more manageable, and ultimately lead to achieving bigger goals.

01 Why are you collecting data?

The goal of collecting data is to share what you did and what happened. You can then add context to the data to express the impact of your investment, project, program, or initiative.

- Are you looking to evaluate whether the program or effort succeeded?
- Or learn and adjust for the next time?
- Make better decisions?
- Show what difference you are making?

Many organizations use data to determine funding, program priorities, and budgets—now and in the future. Leadership should be clear on the goal and communicate with their staff and board at the outset. Be transparent about what you will do with the information you collect. Share it with your board, your partners, and the field. Use it to learn and to inform decisions.

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We use data to determine the viability of our programs and success of our marketing. This is done through surveys, attendance, and participant feedback. Success indicators are dependent upon what the program is.”

~Cheri E. Friedman
The Jackson Symphony

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02 What data should you collect?

There are two types of data: quantitative and qualitative. Reporting on numbers (the quantitative) tallies results. However, to illustrate the full impact, it's best to combine numerical data with stories (the qualitative) about the people served, lives that were changed, and the difference the grant and/or donation made. Personal experiences humanize the numbers. Ask the right questions for information about participation, performance, achievement, satisfaction, behavior change, or community impact. Collect participant feedback to determine how you're doing, if services meet their needs, and what else is required. Use the data to decide what needs to be tweaked, such as program content, scheduling, communication methods/style, or rates—data helps build the appropriate program. You could also use your own feedback and input from conversations and observations you make at site visits, client interactions, community gatherings, and events. Obviously, this is more anecdotal. But, frankly, it's likely the least invasive and burdensome. Smaller organizations may not need much data to make decisions. Measure only what you will use. Data collection should be right-sized. Think of capacity when setting expectations or making a commitment. Resources such as skilled staff, technology, and time are as critical as asking the right questions.

What are your peers collecting?

"Numbers speak to the needs of the service and, with additional infomation, can describe the improvement of quality of life that the equipment we provide, for example, allows - ability to be with friends and family or go to the store, ability to return to work, ability to reduce 'fall risks,' ability to reduce re-admittance to a care facility due to complications from not receiving medical equipment, etc."

~Hersey, DME Exchange of Dallas

"Our board has decided not to focus that much energy on collecting data and instead, rely on our own community involvement and the knowledge of trusted friends and colleagues to keep our finger on the pulse of the community or group that our grantees are working with to get a feel for impact. We understand that the work can take a long time and is multifaceted and, therefore, progress may be slow and harder to define"

~Amy Hyfield, O.P. and W.E. Edwards Foundation

Food for Thought:

For smaller organizations and direct service groups, indicators of success may include how many individuals were served or tracking who is coming to the door and when. This helps the organization assess capacity and increase staff or resources appropriately. That can be enough to allow them to keep meeting their mission—and should be enough for funders to decide whether they should be funded

"During 6-month and 12-month reports, we ask grantees about how hey have successfully met the measurable outcomes they articulated in their applications and for impact stories (how they collaborated with other organizations for greater impact, how they reached individuals, etc.). We also send a 5-yeargrant impact report to prior grantees (5 years after the grant is closed) asking for impact sotries."

~Frances Wilson, Acts of Grace Foundation

03 How are you going to collect it?

The best strategy and method for collecting good data is to do so in conversation with the people collecting the data, the subjects of the data, the data assessors, and the people who will use the data to make decisions or establish next steps. Collecting data shouldn't be taken lightly. When you set out to do so, make it intentional and thoughtful.

The best data collection efforts occur at the point of service or program delivery, continue through conclusion, and include a post-reflection opportunity. Setting benchmarks for success allows you to work better and smarter. Collecting good and valuable information is built into the experience from the start. It is not an afterthought but ingrained into the initiative. This also increases the likelihood that your data will be more accurate and useful. (Think of when you've just finished that service call about your cell phone contract, and you hear, "Please take a moment to tell us how we did." Or when you've made an online purchase and a pop-up box asks you to review your shopping experience.) Additionally, remember to consolidate your data and collection methods. Information siloed in various spreadsheets, data sets, survey results, grant reports, or the institutional memory and experiences of program staff is generally not a valuable and sustainable way to track success, progress, or impact

“Hearing directly from clients tells us what they would like specific to programming, which has helped add/change programs. We look at that in tandem with best practices and evidence-based data to help us enhance programming.”

~Jennifer Waker
The Crisis Center

“We focus largely on basic needs, so we know we make an impact. Without food, people will go hungry. Without shelter, they will be homeless. We measure our impact by the number of people whose basic needs are met through our programs, but also by the level of empowerment they feel given the physical and emotional support they recieve in our programs - confidence to then face the challenges that confront them as they move forward. This can be a difficult outcome to measure, but it is also the most relevant way to track our mission and our client focus. The greatest challenge is demonstrating to grantmakers that these types of outcomes are valid and appropriate.”

~Tamara Fox
SafeHouse Denver

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Favored Collection Methods:

- Pre- and post-evaluations / surveys
- In-person observation
- Individual interviews
- Focus groups
- Reports
- Historical research

Every organization is different, so a one-size-fits-all method of collecting and measuring impact doesn't make sense. One way to make this process easier is by using **grants management software** that enables you to collect all types of data and stories from your grantees and the communities you serve in a single location so you can easily access and report on real-time dat

04 What is your data telling you?

Analyze your data and turn it into useful information based on what you are trying to convey. But remember, reporting on data in the short term may not reap the information and perspective you anticipate. Making use of certain information takes time. If you want to track actual long-term impacts, you must go deep. That means putting dollars, resources, and relationships behind the effort. Communicate results.

For example, share your results with specific audiences through a field scan, periodic progress reports, and more widely in an annual report. Iterate and improve your process.

Understand limitations and know you may not always get exactly what you seek. Flexibility is key. For example, consistency of long-term and detailed information may be challenging to secure and assess with vulnerable or transient populations, particularly due to privacy and confidentiality constraints. Adjust your measures and stay open to the possibility that you may need to pivot, pick another indicator, or measure success differently. Be sure to remain open-minded about results. Welcome surprises. You may not always end up with the answers you want or thought you'd get, but that is precisely the point. Having data isn't a solution

Data collection is all about learning. So, don't give up!

Try it together to maximize your effforts

View collecting and using data as an opportunity to learn, improve the work and the sector, evaluate what is working and what is not, take risks, and do things differently–regardless of whether someone is asking for the information. Data collection can help you discover interesting avenues to pursue change and open up new collaborations, innovative solutions to problems, and funding streams. Although funders and nonprofits have different goals and strategies, it's important to keep the respect that should define the funder-grantee relationship in mind—on both sides. If you want more, invest more. After all, working in partnership to collect and share information will make the process more worthwhile and valuable for us all

Sharmila Rao Thakkar, MPH, MPA, is a philanthropy and nonprofit consultant at SRT Advising & Consulting in New York City. Known for her expertise in leadership development, program implementation, resource development, and communications, Sharmila advises and coaches donors, families, and organizations on operations, strategy, board governance/development, multigenerational engagement, equity and inclusion, grantmaking, and community outreach activities; conducts workshops and trainings and manages peer cohorts exploring the above; and writes and presents at nonprofit and philanthropy forums. She is a 21/64 certified trainer in multigenerational philanthropy and mentor for philanthropy/nonprofit leadership development programs.

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