Become an Intentional Data Collector:

An actionable guide for funders

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Created in partnership with Sharmila Rao Thakkar, Founder of SRT Advising & Consulting

Become an Intentional Data Collector:

Whether you're just beginning or considering how to enhance your data collection efforts, learning how others are doing it can be key to setting your own strategy. We had the privilege of chatting with a few of our funder clients about how they've shifted their processes, addressed challenges, and undertaken new initiatives to enhance data collection and usage for both their grantees and themselves.

This guide was created using real experience and lessons learned from your peers about how to collect data. It is intended to be used at any stage of the process. So, jump in wherever it's most useful for your organization.

We wish you luck on your journey to intentional data collection!

Getting Started:
Purpose and Planning

Taking a moment to put yourself in your grantees' shoes will provide the insight and perspective needed for genuine empathy. Understanding where you are, where your grantees are, and where you each want to go is essential. What information is absolutely necessary? What can you do without? Why are you doing this in the first place? Awareness is key—take a moment to dive into some of the Unintended Consequences of data collection.

Resources:

Tool: Grantee Perception Report from Center for Effective Philanthropy

Resource: Grantmakers for Effective Organizations

Idea:
Create your own feedback mechanism via questions on electronic response and grant forms.

1:1 Grantee Conversations and Group Convenings

Invite your grantees to share their experiences, questions, and ideas.

“After starting to hold one-on-one sessions with our grantees, the grants we received were simply better—they were more fleshed out, more fundable, and a better fit within our focus areas. This saved our time and the time of those grantees who were not a good fit for funding. We were even able to tell some grantees who applied for smaller grants that they were fundable for more."

- Elyse Pollick Byrnes, Community Investment Officer (former)

Ask yourself:

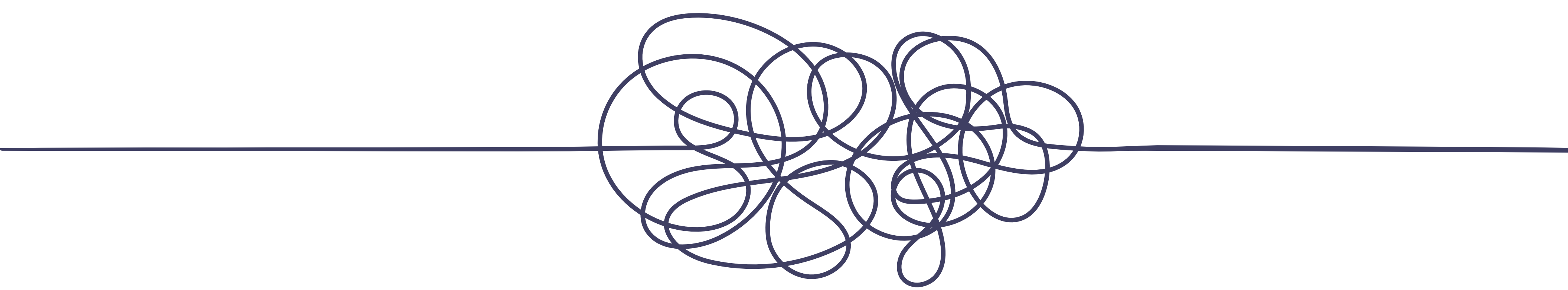
“Is the way we’re currently collecting data effective?”

“We knew our focus areas were too broad to give us a good way to measure our impact. So, we decided to narrow down the areas to help us concentrate our work and make a bigger overall impact in fewer areas. We chose result areas with the largest need in terms of people affected—the areas that didn’t have a lot of other resources available or had some synergy around them.”

- Christine Mulvin, Senior Program Officer

Getting Started:
Alignment

Revisiting why you do this work and what you want to see will help evaluate where and how to start. Ensuring your plans align with the organizational mission, vision, values, and goals will keep your forward progress strategic and avoid getting off-track. Move from the intuitive (doing what you always do from learned habits) to the intentional (seeking new knowledge and being thoughtful about your impact on others and the work).



Ask Yourself:

1. What information have we been collecting?
2. Are we asking the right questions in order to know we're staying in alignment with our mission, vision, and values? This looks different for every organization.

Use Public Data Sources

Consider existing resources for comparative data to help tell your story. Use data collected by others to benchmark and track progress. Encourage your grantees to use that data set in their own impact measurement efforts. Potential sources include Census data, the United Way, larger foundations in your area of interest, an arts and culture database, partnerships with area universities, city organizations, and community foundations.

Accepting Unsolicited Proposals

Requests for Proposals (RFPs) can open lines of communication and allow for sharing of information that might have otherwise stayed hidden.

Getting Started:
Building Buy-In

Bring other voices to the table—internally amongst foundation staff and with your community, nonprofits, and grantees. Sometimes it just takes one person to ask, "But why?" A willingness to go deep and explore your processes and culture is essential. If a process isn't working, don't just go back to the drawing board…examine the culture.

Convene a subcommittee of staff, board, and community members who will be able to ask the right questions in the beginning and will also be influencers and advocates throughout the process.

Resources:

Tool: Implement core principles of Project Streamline
Tool: Review Exponent Philanthropy's Getting to Impact: Why Evaluation is Key
Tool: Take the 10-Minute Impact Assessment from Exponent Philanthropy
Tool: Check out Foundant's Strategies for Sustainable Tracking

Implementing:
Seek Feedback

Ask: How are we doing? Does this work? How can we do better? Involving grantees and being open and honest about what is happening and how shows you are thoughtful, intentional, and interested in learning and improving. Understanding is key—take a moment to dive into some of the Unintended Consequences of data collection.

Convene Grantees

Host informational workshops and sessions for grantees and prospective grantees to comment on your processes and incorporate recommended revisions.

Be Open to Change

This may involve streamlining your giving areas—be ready to consider this.

Keep Lines of Communication Open

Be transparent in your requests for feedback from grantees. Let them know you seek to improve your processes and that their input is instrumental.

"We rely on your grant reports to assist us in our grantmaking. Please give us your honest thoughts about the short-term results and the longer-term potential of the project, program, or work for which funds were granted. We are just as interested in what didn't work as what did. Your candor will not have punitive consequences; while we understand the wish to focus on successes, we respect the insight involved in also sharing hard lessons learned."

[Excerpted from York County Community Foundation grantee communication]

Resources:

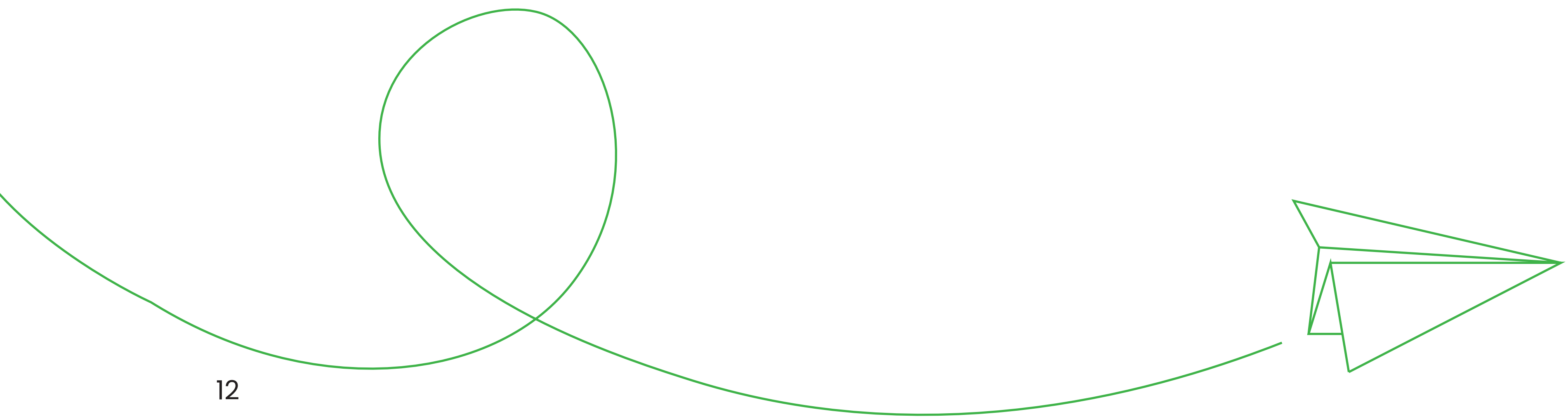
Tool: Grantee Perception Report from Center for Effective Philanthropy
Idea: Create your own feedback mechanism via questions on electronic response and grant forms.
Resource: Grantmakers for Effective Organizations
Tool: Guide to Maximizing Your Data Collection Efforts

Implementing:
Streamline

Be straightforward, concise, and clear. Remember that one size does not fit all, and there is more than one approach. Finding what works for your foundation and your grantees will be a commitment. You can reduce the burden on grantees by:

- Only ask for the information necessary to make decisions
- Right size your requests
- Accept numbers plus narratives—both quantitative and qualitative data

And then, share what's working—this process will inevitably expose new ideas, create efficiencies, and generate impact.



Simplify Your Language

For example, breakdown multi-pronged questions into several direct questions focused on a single topic. Add instructions on how to answer questions and provide sample text.

Before: Compound Questions

History, Mission, and Population Served
Briefly describe your organization's history, mission, and population served.

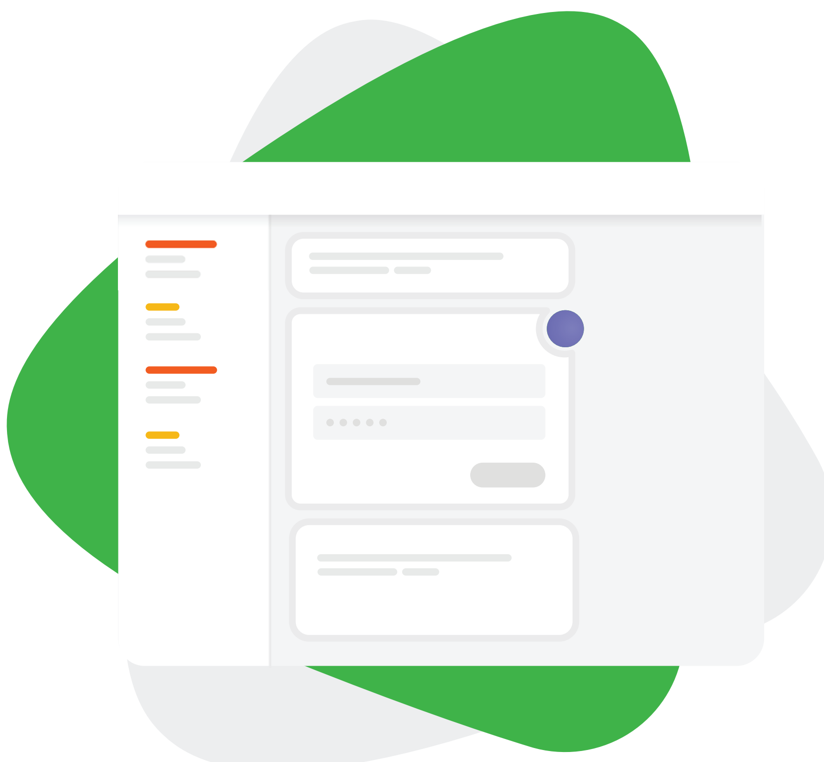
After:

Mission Statement
Please include your organization's mission statement.

Mission Achievement
How does your organization work toward the achievement of your mission?

Update Grant Reporting

- Be clear about what you are looking for. Re-state the initial goals for the project. For example, "You said you'd do X. Did you do it? How do you know? How did lives change? How did your work change?" Consider adding a logic model structure to ask for outputs/outcomes/measures of success.
- Decide which aspects of reporting are mandatory; right-size reporting requirements.
- Consider check-in calls instead of mid-year or interim written reports.



Implementing:
Build Capacity

Teach, plus empower your grantees to do it themselves. This builds accountability. Don’t tell them what to measure; ask them what they want to measure. How does that align with their own mission, vision, and goals? Then, support those reports.

“If grantees are promising to track additional data, ask them how they plan to do it. Encourage them to build capacity for tracking and reporting into their grant request. In the end, grantees have the tools to make more fundable requests, which allows them to get more funding, and ultimately leads to better grants and a happier board."

-Elyse Pollick Byrnes

Capacity Building Ideas

- Consider existing resources for comparative data to help tell your story. Can you use data someone else is collecting to benchmark or track progress?
- Use your resources/technology to be the one-stop source for collected data.
- Create rubrics, scoring systems, scales, and dashboards to turn responses into a story about how the grantee organization has achieved its goals.
- Share what you're doing through grantee information sessions, webinars, and planned discussions.
- Encourage grantees to write measurement into their grant requests. Invite grantees to seek funding for database support/software and training.
- Remember that community grant reviewers bring local context and deeper insight.
- Meet grantees where they are, but also build capacity to deepen efforts:
    - Ask what they're collecting and discuss what supports are needed.
    - Create tiered/preferred outcomes based on grant size/type.

Ongoing:
Continuous Improvement

BE FLEXIBLE. We embark on data collection to be better, do better, and support better. When we see data collection as a learning journey, we're more open to the possibilities of discovery through the process. Ongoing education is key—take a moment to dive into some of the Unintended Consequences of data collection.

Simple Steps Can Have a Big Impact

Ask grantees what didn't work for them, provide technical support, or adjust the questions accordingly.

> "In York County, we recognized that standardized tests measuring achievement by grade were not a valid indicator of achievement for students living in acute poverty. We believe a better benchmark of progress is those tests that measure a student's academic progress throughout the school year, so this is the indicator we track for our inner-city schools."
>
> -Elyse Pollick Byrnes

Develop Lessons Learned Library

- Create a database of lessons learned as reported by grantees (i.e., "If I knew then what I know now...") plus internal program staff reflections.
- Create board summary reports with various informational sections via merge templates in your grants management software.

Review Phase

1. Community reviewers: Rubric scores and in-person discussion
2. Reviewer scores help adjust questions: Application questions with low scores overall are rewritten
3. Evaluate review process with reviewers

Ongoing:
Practice Transparency

Data collection enables impact measurement, enhances processes, builds relationships, and increases efficiencies, making you a better grantmaker and supporting grants/ organizations doing good work. Share the feedback received in a consistent, meaningful way so that themes can be identified and future processes and programs enhanced.

Share Lessons Learned

"We share our outcomes and lessons learned publicly through an annual luncheon, grantee project fairs, grantee spotlights on social media, and annual reports."
-Christin Mulvin

Keep Lines of Communication Open

- Use video calls and webinars to create better accessibility (i.e., Zoom, GoToWebinar).
- Share results with grantees, community, and reviewers to help when developing future programs and evaluating future funding.
- Share updates on your website and social media. Detail your process, FAQs, etc., on your website and other channels.

Ongoing:
Simplify

Viewing this work as an opportunity to build capacity and learn together so we can continually improve makes it easier to work through the challenges. To be a true leader in this sector, we must realize that we are not the experts. Remember that less is more and approach conversations by first seeking to understand.

Report Back

Use reporting to communicate lessons learned and feedback to improve processes for grantees.

Less is More

- Identify redundancies and bottlenecks—if something isn't working, change it or eliminate it.
- Allow grantees to submit application components that have been submitted to other funders.
- Leverage your grants management software to create a Board Summary Report. This tool can make it easy to enter data pieces, pull them, and merge them into a document presented to the board in a concise format.
- Align conversations you've had with grantees, their LOI, the application, grant forms, and evaluation forms/grant reports to ensure shared language on key questions.
- Revisit the buy-in stage and ensure your stakeholders are still aligned—without alignment, differing opinions begin to muddy the water, and simplicity becomes unattainable.

Example Board Report

Merge template created to pull a summary for board books.

Organization name is at the top.

Visual scale (i.e., colored dots) indicates Achieved/Partially Achieved/Not Achieved for the listed outcomes.

Committed to continuous improvement

Try it together to maximize your efforts

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

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