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Better data. Greater impact.

Monthly Event Topic:
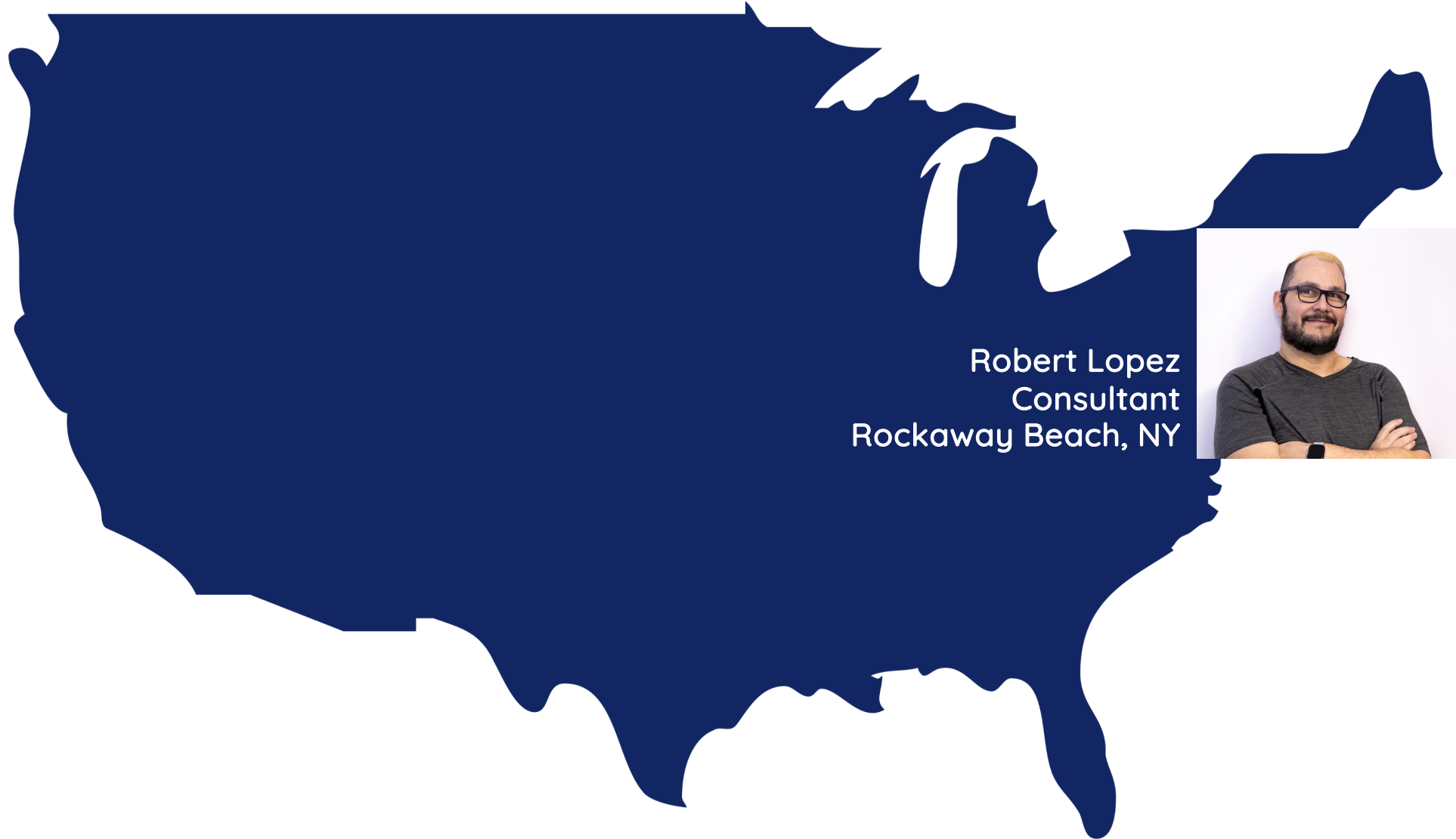
DATA COLLECTION: TURNING THE UNKNOWN INTO USABLE DATA

Presenters: Robert Lopez
                August 16, 2023

Your Presenter

Robert Lopez
Consultant
Rockaway Beach, NY

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Team Treadwell

- 126+ Years of Nonprofit or Data Experience
- 200+ Clients in the last Year
- 4 Countries served:
  - US, Canada, UK and Australia

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Treadwell's Core Values

Impact through Technology:
We simplify and leverage integrated technology to help nonprofits improve the lives of their clients and the community through performance-based measurement systems.

Unbiased, Client-focused, Independent:
While we have relationships and partnerships, we are staunchly independent. In the course of consultation, we always place our clients' needs above our own desires and any third parties' interests.

Innovation:
We are artists/creators/engineers/innovators. We creatively use the tools that we have at our disposal and develop/identify new tools to better achieve solutions for our clients.

Personal Fulfillment:
We are a community who celebrates, appreciates and empowers each other's personal and professional fulfillment and self-actualization.

Unbiased

Client-focused

Independent

Passionate

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Getting to know you

- Your Name
- Organization
  - Location
  - Mission and Services
- Your role within your organization
- Intro Question
  - What is one thing you see as a challenge with entering quality data?

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Turning the unknown into usable data

TODAY'S TOPIC

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Purpose of Today's Call

- Review Data Collection Best Practices and Basics
- Identify straightforward ways to define the unknown
- Identify ways unknown data can support staff development, build client rapport and strengthen the integrity of your data

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The Data Machine

Consider All Stakeholders

Those Receiving Services

Staff and Board

Partner Organizations

Donors

Funders

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Data Collection Best Practices

Speak in plain language

Make the data exchange mutually beneficial

Safeguard your data

Know the rules and regulations

Know your boundaries

Set data governance policies and procedures

Ensure Data Quality

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Ensuring Data Quality

Accurate   Is the data correct in every detail?

Complete   How comprehensive is the information?

Reliable   Does the information contradict other reliable resources?

Relevant   Do you really need the information?

Timely   How up-to-date is the information? Can it be used for real time reporting?

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Transforming the Unknown

Data Quality Questions	Ask what is known
	Utilize conditional rules/form logic
Expand Responses To Opt-Out	Client Doesn't Know
	Client Refused
	Data Not Collected/Not Asked

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Opting out can improve data quality and culture

-Aliases - Client Refused	Builds rapport
	Empower clients
-Data Not Collected	Creates Space for those collecting data
	Can help Identify Training Needs
Client Doesn't Know	Can identify client needs

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Question Examples

*Name Data Quality ⃝

○ Full name reported
○ Partial, street name, or code name reported
○ Client doesn't know
○ Client refused
○ Data not collected

*Date of Birth Data Quality ⃝

○ Full DOB reported
○ Approximate or partial DOB reported
○ Client doesn't know
○ Client refused
○ Data not collected

How do you identify your race?

☐ Hispanic or Latino/a/x or Spanish Origin of Any Race
☐ American Indian or Alaskan Native
☐ Asian
☐ Native Hawaiian or Other Pacific Islander
☐ Black or African American
☐ White
☐ Two or More Races
☐ Prefer Not to Say
☐ Did Not Collect

*Gender (as many as are applicable) ⃝

☐ Female
☐ Male
☐ A gender other than singularly female or male (e.g., non-binary, genderfluid, agender, culturally specific gender)
☐ Transgender
☐ Questioning
☐ Client doesn't know
☐ Client refused
☐ Data not collected

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Reporting Sample

Gender Identity	01 2023 January	Percentage: of those reporting
Agender/A-spec		
Cisgender Man	56	42.42%
Cisgender Woman	25	18.94%
Declined to answer	2	1.52%
Gender Non-Confoming	1	0.76%
Genderqueer	4	3.03%
Non-Binary	10	7.58%
Questioning/Unsure	1	0.76%
Self-Identified/Other	8	6.06%
Transgender	5	3.79%
Transgender Man	7	5.30%
Transgender Woman	13	9.85%
Sum:	132	

Gender Identity	01 2023 January	Percentage: of those reporting
Not asked	3	9.68%
Unknown	28	90.32%
Sum:	31	

Reporting and Monitoring

Reporting

Update your reports to account opting out and share that with funders

Monitoring

Review data not collected quarterly to identify training opportunities

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What About Other?

Other	
	Use sparingly
	Review regularly
	Can identify shifts/changes

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Questions

Managed Services Program Benefits

- Base Managed Services
  - Consultation
  - Support Coordination
  - System Monitoring
  - Access to exclusive monthly Treadwell events
  - Discounts on additional services
- Tiered Services
  - Professional service hours
  - Access to Treadwell's network of experts
  - Credits towards advanced features

September's Call

Automation Show & Tell

September 20, 2023
4 PM Eastern

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