National Council of Nonprofits

5 Ways to Simplify Your Data Practices So You Can Focus on Your Mission

By: Kenzie Strong

Measuring impact in a meaningful way is increasingly critical for nonprofits, but it’s often a daunting challenge. Many nonprofits find themselves short on staff and resources to collect and analyze data. Leaders must figure out how to handle the tactical measurement activities that must be done while also making time for strategic and forward-thinking activities.

There is also the frequent tension between responding to the external reporting requirements from stakeholders, such as funders, and the internal measurement activities that help leaders better understand community needs, improve program quality, and meet the goals that contribute to the mission of an organization.

At ResultsLab, we’ve worked with many nonprofit leaders in this position – stretched thin by the influx of reporting requests and overwhelmed with the amount of data to manage. However, we believe data can be used in a way that’s actionable and makes it relatively easy to pull out key insights to drive decisions.

Below are five ways to start moving your data practices from a place of overwhelm to ease.

1. Create a measurement strategy

A measurement strategy sets the vision of an organization's data practice. It consists of three parts: goals, values, and learning questions (these are the specific, actionable questions your organization wants to answer with data). Most organizations collect lots of data, but they may be unclear on what important questions they really need to answer. The process of creating a measurement strategy allows an organization to identify the right questions to answer at the exact right time – as opposed to trying to answer questions that are "sort of interesting," but not actionable. It's a useful place to return to if you are at a crossroads or decision-making point related to measurement.

Sistahbiz Global Network, a nonprofit that helps Black women solopreneurs and microbusinesses build scalable, sellable businesses, is familiar with the complexities when responding to multiple stakeholder reporting requests, each with separate goals, indicators, and reporting systems. Sistahbiz's measurement strategy has been a crucial tool to help minimize those complexities.

Makisha Boothe, CEO of Sistahbiz, spoke in a 2021 panel conversation, "Shifting Perspectives: Reinventing Impact Measurement with Nonprofits," hosted by ResultsLab and Grantmakers for Effective Organizations (GEO). In the panel, Makisha shared how Sistahbiz uses a measurement strategy to stay focused on their community's needs. While the temptation to prioritize funder needs is strong, responding to community needs is more important. This strategic framework allows their organization to see when funder needs are getting in the way and can help inform their decisions when at a crossroads. (Watch recording here.)

Another piece of advice Makisha shared was for nonprofits to build relationships with funders that value feedback from grantees, and leverage your measurement strategy to clearly explain what specific metrics your organization is collecting, when, and how. Then, communicate which data requests are in alignment with the practices that already exist in your organization and which requests are creating more administrative burdens.

“I stay anchored in what I’m trying to achieve with the women in my community. I believe in the power of data to help do that,” Makisha said. “I seek funders who understand and support that.” She said that if a funder requires her organization to collect data they’re not already collecting and don’t find valuable, she sometimes walks away. “It’s really important for me not to accept funding attached to reporting requirements that reduce capacity, take me away from the front line work or negatively impact my relationship with participants,” she explained. “I’m working in a community that has been historically marginalized and disenfranchised. Asking their very sensitive personal information requires strategic timing and a careful approach. When you’re able to collect, it’s because you built relationships and trust with people first.”

2. Conduct a data audit to understand current context

It can be hard to understand all the moving pieces happening in your organization’s data practice when tasks are split across different data collection tools, databases, and reports. Investing time up front to review and document everything can end up saving you or your team hours, days, or weeks’ worth of time in the long run. During a data audit, you will document in one place the different data collection tools and the data points you are collecting.

Through this process you’ll be able to see which data points are helping answer the learning questions in your measurement strategy. You’ll also be able to see which data points might not make sense to collect anymore. A data audit almost always results in organizations eliminating data points, or even full data collection tools that were not being used productively and did not answer important questions. It lightens the load of work!

For example, let’s assume you’re doing a data audit for a youth services program. In this program you’re collecting data from participants through an intake form and an annual survey. You compile all the data points across both those tools and begin to map them back to key indicators that will help answer your learning questions. After completing the audit, you realize there are a few questions you’re asking in both tools that only need to be asked in the intake form. You also notice there are a handful of data points that aren’t mapping back to any of the indicators you’ve identified. While these data points are interesting, you realize they aren’t necessary to know and aren’t being used. These are both opportunities to remove the fields from your data collection tools to help streamline your process. It also makes it easier for your participants to complete as well.

3. Eliminate nonessential measurement tasks & tools

Once you have the contextual background of the data audit, you can identify opportunities to simplify and streamline your data practices.

It’s important to recognize that not all measurement tasks are created equal. Some may be essential to understanding the impact of your work, while others may be less critical. Dropping unnecessary measurement tasks can help you focus on what's most important and avoid wasting time and resources on tasks that are misaligned or unused. To determine which tasks to drop, consider which ones have the least impact on your goals, which ones are the most time-consuming, and/or which ones are most disconnected from your strategic measurement values such as, efficiency, equity, or impact.

BuildStrong Academy of Colorado, a nonprofit that provides training and job placement for youth and adults in the construction industry, came to us needing help with their data systems management. To track the different engagement points across the full lifecycle of a student’s journey, they were using a variety of tools including PowerBI, Excel, and GStars, among others. After completing a data systems audit, an opportunity was identified to consolidate all those tools into one system. The ability to drop several systems meant there were fewer administrative tasks to keep up with and fewer manual tasks that required human time and attention. Before, the process was too burdensome and time-consuming for internal staff to manage. Once they consolidated everything into one tool, the process became simplified enough for a single team member to maintain moving forward.

4. Streamline tasks through automation and documentation

In data work, there are often tasks that get repeated over and over again. While each task may seem quick to complete, the amount of time and energy put into repeating the steps each time adds up. Identifying opportunities to streamline or automate your processes using software or other tools can not only save you time, but it can open up space for you or your staff to focus on other activities that are higher return or more rewarding.

For example, after we helped BuildStrong Academy integrate their PowerBI, GStars, and Excel data into one system, we helped them automate their biannual board report. The original process required a member of their staff to manually export the raw data from GStars, import into Excel, format the data, create a pivot table, build charts, and then transfer the new chart into their PowerPoint-based board report. To streamline the process, we broke down each of the steps and developed an automated data workbook. We then added formulas and links across Excel and PowerPoint so that every time new data were added, the pivot tables, charts and PowerPoint would all be updated with the simple click of a button.

If automation feels too complex, there are simpler ways to streamline your processes. An example could be creating a templated response to replace an email that you find yourself sending out on a recurring or frequent basis.

5. Delegate tasks to others – or prepare to do so later

While you might not have extra staff (yet) to manage your data practices, you can still delegate some of the tasks to others. If you don’t have staff to dedicate, or staff with capacity, consider hiring a part-time employee or getting contractor support. Identify which tasks make sense for you to hold on to, and which ones you can let go. Which tasks would be a better use of resources if someone else was doing them? By contracting with an external data manager, BuildStrong Academy was able to delegate their data collection and analysis needs, allowing their team to concentrate on the tasks they excel at.

Even if you don’t have the resources to delegate data collection or analysis now, you still can start to document the steps around the tasks that *could* be delegated. Write up a step-by-step operating procedure, pasting in screen capture images to document everything you’re doing from start to finish. When you are ready to get some additional support, whether internal or external, you’ll have done the preparation work to hand it off quickly and seamlessly.

With BuildStrong Academy, we built out a standard operating procedure (SOP) that helped manage their biannual survey process. Although the primary goal of the SOP was to help ensure the process ran more smoothly, when one of their staff was out on leave, the SOP also served as a functional how-to guide making it easy for the staff’s counterpart to jump in and carry out their tasks while they were out.

Conclusion

All five of these data management practices will give you and your team more time, more energy, and more mental capacity to devote to higher-value activities like strategic planning, team-building, or direct service to advance your organization’s mission.

Kenzie Strong (she/her) has spent the past 20 years developing, implementing, and evaluating programs on a local, national and global level. She has designed and led evaluation capacity building initiatives, supporting over 100 organizations to strengthen their evaluation and learning practice. Kenzie is the VP of Quality and Innovation at ResultsLab, a woman-owned social enterprise propelling nonprofits to the next level of impact through quality design and effective use of data. Learn more about ResultsLab at https://resultslab.com.