PolicyWise
BUILD BETTER DATA

Data Lifecycle Resources: *Inform*

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Introduction & Starting Point

The Data Lifecycle is a tool to proactively plan an organization's data journey. It provides a bird's eye view of how data can evolve from inception to reporting and beyond. The intent of the Data Lifecycle is to build a foundational tool for non-profit organizations to use when collecting data to inform service delivery and organizational planning. Good data collection can look different depending on each service organization and their client base and can be reflected upon throughout the Data Lifecycle. It is important to understand how to collect data and then use the data consistently in decisions being made for your organization.[1]

For non-profit organizations, the data lifecycle can be used as a way to inform the planning and implementation of services. The development of outcome measurements is important for the success of the organization and for the progression of clients.[2] Building appropriate processes in advance can also streamline the generation of reports and funding applications when that time comes. The clients are the primary drivers in guiding and generating desired outcomes.[1] It is important to recognize that non-profits are often responsive to community needs and are leaders for underrepresented or marginalized groups.[2]

Data lifecycles provide a structure to organize and think about the activities involved in managing and using data within a project or organization. The data lifecycle resources are organized into the following sections. Each of these topics can be explored in more detail within each section of the Data Lifecycle.

- Considerations & Lenses
- Plan
- Build
- Collect
- Prepare
- Analyze
- Inform

The Data Lifecycle addresses some of the main concerns around data collection, starting with the questions of why and how data is being collected. These sections explore how non-profit organizations can collect data in a manner that is sensitive to the realities of their clients and authentic to their mission. Furthermore, the Data Lifecycle discusses the importance of communication (both internal and external),

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[1] Nonprofit hub & Everyaction. (n.d.). *The state of data in the non-profit sector.* https://nonprofithub.org/datareport/

[2] Benjamin, L.M. & Campbell, D.C. (2015). *Nonprofit performance: Accounting for the agency of clients*. DOI: 10.1177/0899764014551987

minimizing data collection, accuracy, interoperability, and good governance. These aspects are engaged in greater detail in the various sections. For instance, Plan explores best practices of data collection and Collect describes how organizations can increase the impact of their data. The Data Lifecycle serves as an organized guide to the most important facets of data collection, providing a roadmap for non-profit organizations as they work with clients.

> *Where to start in your data journey? We encourage starting with two key questions:*

1. Why are you collecting data?

Data may seem disconnected from the overall mission of an organization. Most staff are dedicated to helping clients first and foremost. Collecting data may seem like additional work. Collecting and using data well can contribute greatly to an organization's mission. Effective data collection and use can help improve programming to be more efficient and impactful.[3]

Data fits within an organization by:

- Building trust
- Demonstrating how organizations achieve their missions
- Creating buy-in from staff
- Providing essential information for funders

For more information, go to the following sections of the Data Lifecycle:

Considerations & Lenses

Plan

Inform

2. How are you collecting data?

To support the needs of clients and provide effective services, data needs to be collected. Data is about people's journeys and stories However, in the rush to get the needed information it is possible to compromise relationships with clients. By thoughtfully considering how you are engaging with your clients, you can foster a more positive relationship.

When collecting data from clients, consider:

[3] Fruchterman, J. (2016). *Using data for action and impact*. Stanford Social Innovation Review. https://ssir.org/articles/entry/using_data_for_action_and_for_impact

- Ways to build trust including engaging in conversation as an accessible way to collect data. For example, questions and response choices reflect their individual circumstances.
- The way in which questions are asked, which depends on the sensitivity of the information that could be provided (e.g., asking about immigration status, emergency contacts vs. services required, postal code) and in demonstrating transparency and authenticity. For example, clients need to know how the information they give will be used to benefit them.

For more information, go to the following sections of the Data Lifecycle:

Build

Collect

Analyze

[4]

Disclaimer – the information provided in the Data Lifecycle could evolve. If you have ideas or feedback please email info@policywise.com

[4] Icons made by Freepik from www.flaticon.com.

Inform

Inform

In the inform phase, it is important to demonstrate how an organizations' use of data addresses the original goal for collecting the data. Using data to inform means understanding and sharing the story the data can tell. Effective storytelling requires an understanding of the issue, audience, questions of interest, and the different types of data that can be used to help answer those questions.

Satisfying reporting obligations to funders is typically the primary goal of data collection. Funders often require specific data from a set time. For example, organizations may collect data on the populations accessing services (demographics), service delivery (process data), service use and the effects of service use (outcome data), and whether these services are ultimately influencing larger social issues (impact data). Reporting on some or all of these data points may be based on the fiscal year, funding cycle, or specific program timelines.

There are additional goals that can be considered to maximize data (i.e., demographics, process, outcome, and impact data) collection efforts. Data can also be used to inform:

- client-centered practices;
- design, content, processes, and evaluation of social serving work;
- priorities and directions of organizations; and,
- challenges and potential solutions for the broader social issues at play.

Creating a plan for collecting and analyzing data to address multiple goals can help to maximize the organizational resources already dedicated towards reporting obligations and contribute to robust, evidence-informed internal and external processes. These can include:

1. **Supporting clients to meet additional needs** – demographic and outcome data may be important to share with other social serving organizations to support clients to meet additional needs. Data sharing may be an important client-centered tool to support efficient and effective navigation of complex systems of services; however, there are important legal and ethical obligations to consider. If data doesn't need to be connected to a specific individual, it should be anonymized to protect privacy. If data does need to be connected to a specific individual to ensure safety and appropriate referrals, consent from that client should be obtained wherever possible and reasonable.

> PolicyWise has developed a framework to support **ethical decision-making for information sharing**. This tool leads service providers step-by-step through foundational values and essential practice considerations. This framework was originally developed for the information sharing in the homeless-service sector, but may have broad applicability to the wider adult social serving sector. It can be viewed here: *https://policywise.com/resource/ethical-decision-making-framework-for-information-sharing/*

2. **Internal decision-making** – rather than going with your 'gut' or using anecdotal data that can be subject to unconscious bias, internal decisions, such as strategic priorities, organizational or programming changes, and funding allocations, can be grounded in your data. The type of data you could use would be contingent on the question or decision you are facing.

3. **Program improvement** – by bringing together demographic, process, and outcome data, gaps in accessibility, service delivery, and outcome attainment can be identified. You can also consider collecting targeted data to understand more specific information about how, where, and why these gaps exist. With this data you are well equipped to make a plan to improve your programming to address existing gaps.

4. **Program development** – if an existing program cannot be improved to address identified gaps in accessibility, service delivery, and outcome attainment or if your organization is considering new directions, new programs may need to be created. Your existing data can be used to create a compelling story to pursue funding for this new initiative, or you could explore data related to client satisfaction, preferences, and needs to help inform the design, content, and delivery of a new program or service.

5. **Strategic planning** – examining trends in your data over time can help you to understand internal changes as well as broader social shifts. Using this information in your strategic planning can help your organization to make predictions in order to be responsive to change over time. For example, shifts in population demographics, service use, available funding or services, are all important data trends that can inform organizational decision-making, improvement, and future development.

6. **Advocacy** – your data tells a story that is unique to your organization. Depending on your organization's strategic priorities and desired impact, it may be important to leverage your story to take a position on an important topic. Advocacy can take many forms. You can share your story and your data in support of a cause, to argue against a course of action, or to request something like additional funding or supports from other organizations or decision-makers. Your story can help shape government policies or contribute to a larger social conversation that is already underway. Remember, anytime your internal data will be made public, make sure that it is made anonymous so that no one individual can be connected back to your organization or the data you are sharing.

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