

Data Care & Management Workshop

Welcome to the Data Care & Management Workshop

- We will start at 7am PDT/4pm CEST
- Please join the telephone portion of the training:
 - International Groups: If you haven't been contacted by 7am PDT/4pm CEST, email mott@compumentor.org to get assistance
 - US Groups: Dial 1-866-740-1260
- Please have the following items ready:
 - Print-outs of the presentation slides
 - Pen or pencil so you can take notes during the training
- We are waiting for others to join us, but will start no later than 5 minutes after the scheduled start time.
- Your instructor is Karen Thomas

Thanks for being here!

Data Care & Management

*Best practices, processes, & tips
for caring for your organization's data*

Karen Thomas



Introductions

When prompted by the trainer, please say:

- Your name
- Your organization
- Your country

Using ReadyTalk

- To maximize the window showing the slide presentation click **Full Screen**. To return to normal view, click **Click here for options** and click **Return to normal view**.
- Ask questions
 - Verbally
 - Use **Raise Hand** button
 - Type question in **Chat with Presenter** box and press the **Send** button
 - Email mott@compumentor.org

Using ReadyTalk

(continued)

- Press ***6** to mute your phone (so that others cannot hear you) before making any noises that might be distracting.
- Press ***7** to unmute your phone so others can hear you if you want to ask a question.
- If you lose the internet connection, reconnect following the same instructions you used at the start of the training.
- If you lose the phone connection:
 - International callers: Post a question using Chat with Presenter, letting the facilitator know that you were dropped from the call. We will call you back to re-join the session.
 - US callers: Re-dial the conference phone number and re-join.

Using ReadyTalk

(continued)

- Web training can be challenging, the more you put in, the more you get out
 - Engage as much as possible
 - Resist the temptation to do other work
 - Ask all your questions — don't be shy!
- If I am speaking too quickly or you have a hard time understanding, please let me know.

Technical Difficulties?

Anyone still having technical difficulties with

- Internet connection?
- Phone?

Agenda

- Mott Foundation & the USA PATRIOT Act overview and resources
- Leadership Section
 - Leaders' role in data care and management
 - Strategic decisions
- IT Section
 - How to prepare data for Bridger
 - Data care and security

The Mott Foundation & USA PATRIOT Act Compliance

Pursuant to the provisions of Executive Order 13224 and the USA PATRIOT Act, the Charles Stewart Mott Foundation requires all organizations doing re-granting with Mott funds to check the terrorism watch lists issued by the U.S. government—Specially Designated Nationals (SDN) list and Terrorist Exclusion List (TEL)—and to refrain from providing financial or material support to any listed individual or organizations.

The list-checking requirement applies to Mott grantees – in the United States and abroad – that make their own grants to other individuals or organizations, using proceeds of the Mott grant.

The Mott Foundation & USA PATRIOT Act Compliance (cont'd)

For more information about Mott's policy:

- Talk with your Mott program officer
- Visit <http://mott.org/toolbox/patriotact.asp>
- Review your Mott grant agreement

Support & Technical Assistance

The Mott Foundation provides support to their grantees to meet this new requirement

- Details about Mott's list-checking policy on <http://mott.org/toolbox>
- Training in data care and Bridger list-checking software application
- Direct technical assistance for international organizations

Support & Technical Assistance

(continued)

- Two customized training opportunities
 - Data Care & Management for organizations that want to improve their data management in order to meet this new requirement reliably
 - Bridger Insight™ Online training focusing specifically on the reporting that your organization will need to do for Mott
- Direct technical assistance for organizations located outside the U.S., provided by CompuMentor's partner, Global eRider Network
- Informational & follow-up support resources
 - Project resource page at www.techsoup.org/mott
 - E-mail questions to mott@compumentor.org

The Role of Data in Your Agency

- What is the role of data in your agency
- Major problems or concerns
 - Now
 - Future
- Number of databases
- Number of staff using the databases
 - What are the staff members' roles?
- Support and enhance your data

Benefits of Good Data Management and Care

- **Staff should find it easy to:**
 - Search on mission critical information
 - Enter data only one time
 - Track service outcomes by various criteria
 - Donor information
 - Supporters
 - Clients
 - Services
 - Support your “best practice” service delivery model
 - Your organization’s work is never done
 - Produce multiple reports for management, staff, funders, government agencies, etc.

Leadership Section Overview

- Understand information flows
 - Formal
 - Informal
- Develop staff skills for long-term success
- Budget to prepare for future needs
- Use outside consultants if you lack staff skills
- Make leadership decisions about criteria for success

Leadership Goals

- Support your organization's mission-supporting data
 - Establish clear goals
 - Provide adequate training
 - Budget effectively
 - Secure your data
 - Use outside experts strategically
- Create efficient administrative functions
 - Make accurate data easily available for multiple needs
 - Reports
 - Fundraising
 - Service tracking
 - Analysis
 - Communications

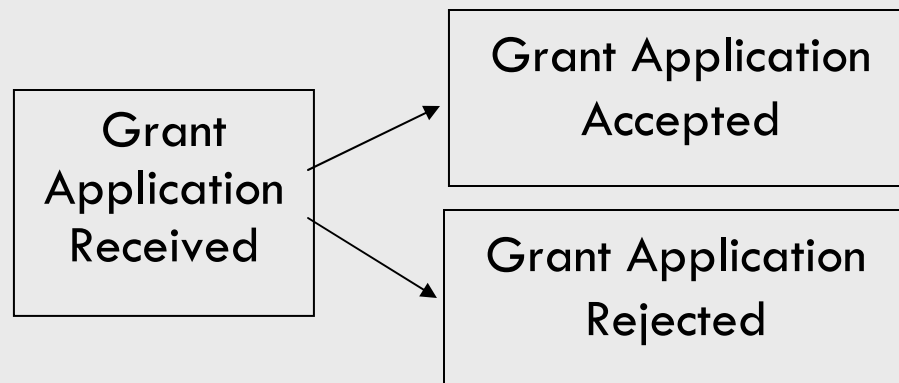
Role of Formal and Informal Processes

- Formal information processes—rules for:
 - Data gathering
 - Data entry
 - Reports
 - Outputs
 - Roles of data within the organization
- How well do you understand your formal processes?
- Informal information processes
 - Work-arounds
 - Custom processes
 - Time-wasting efforts

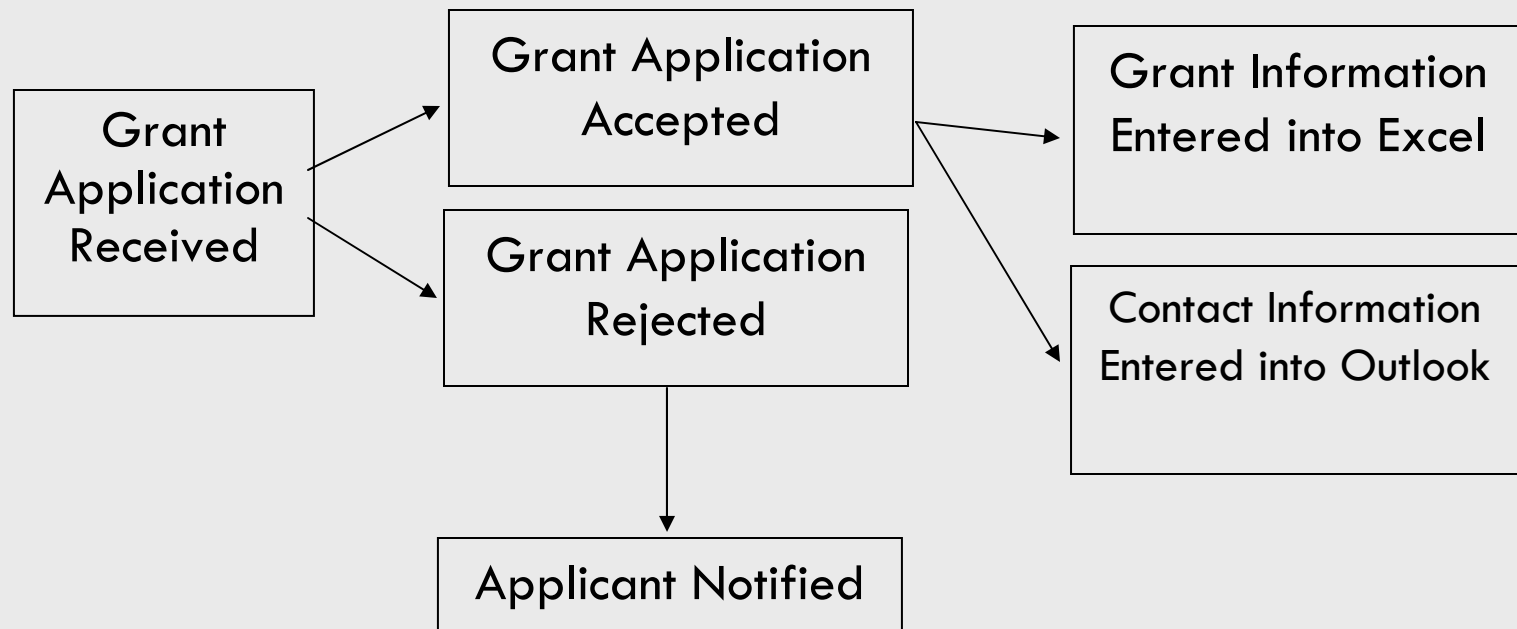
Process Mapping

Grant
Application
Received

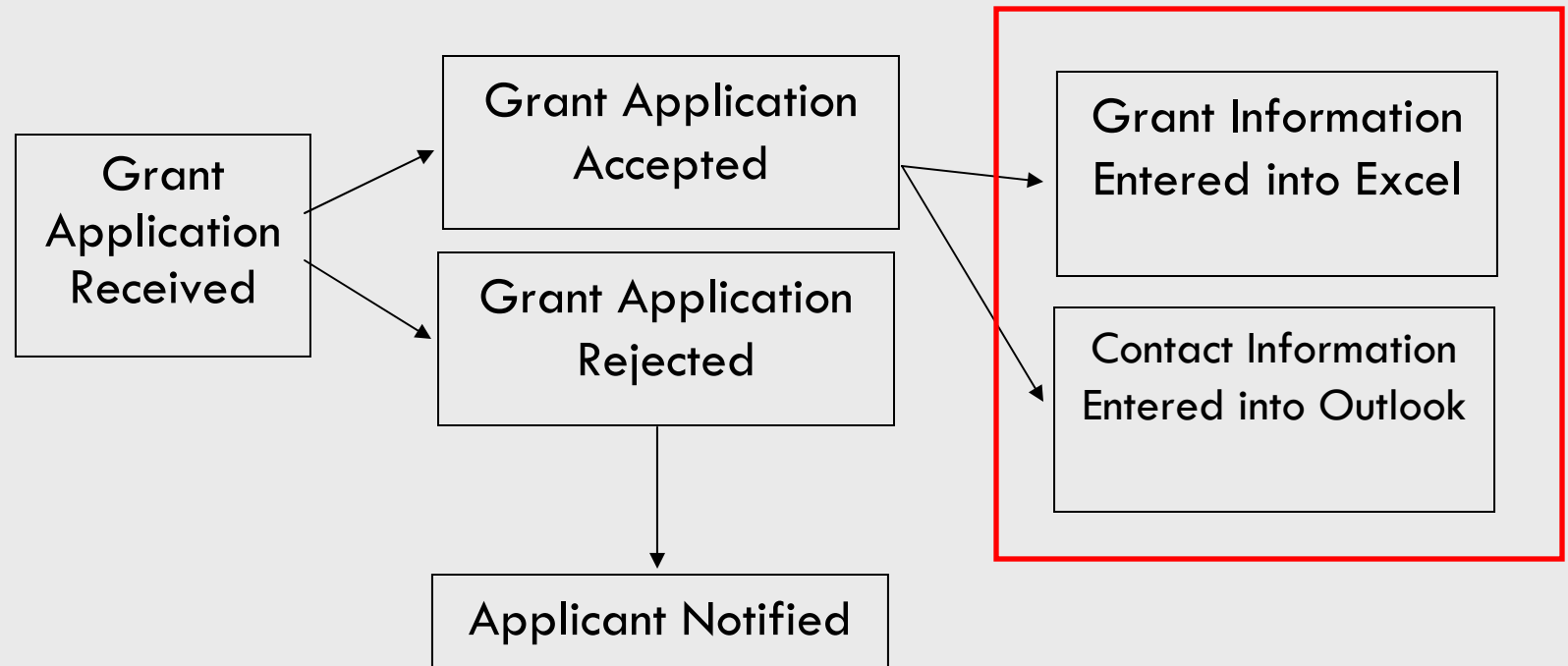
Process Mapping



Process Mapping



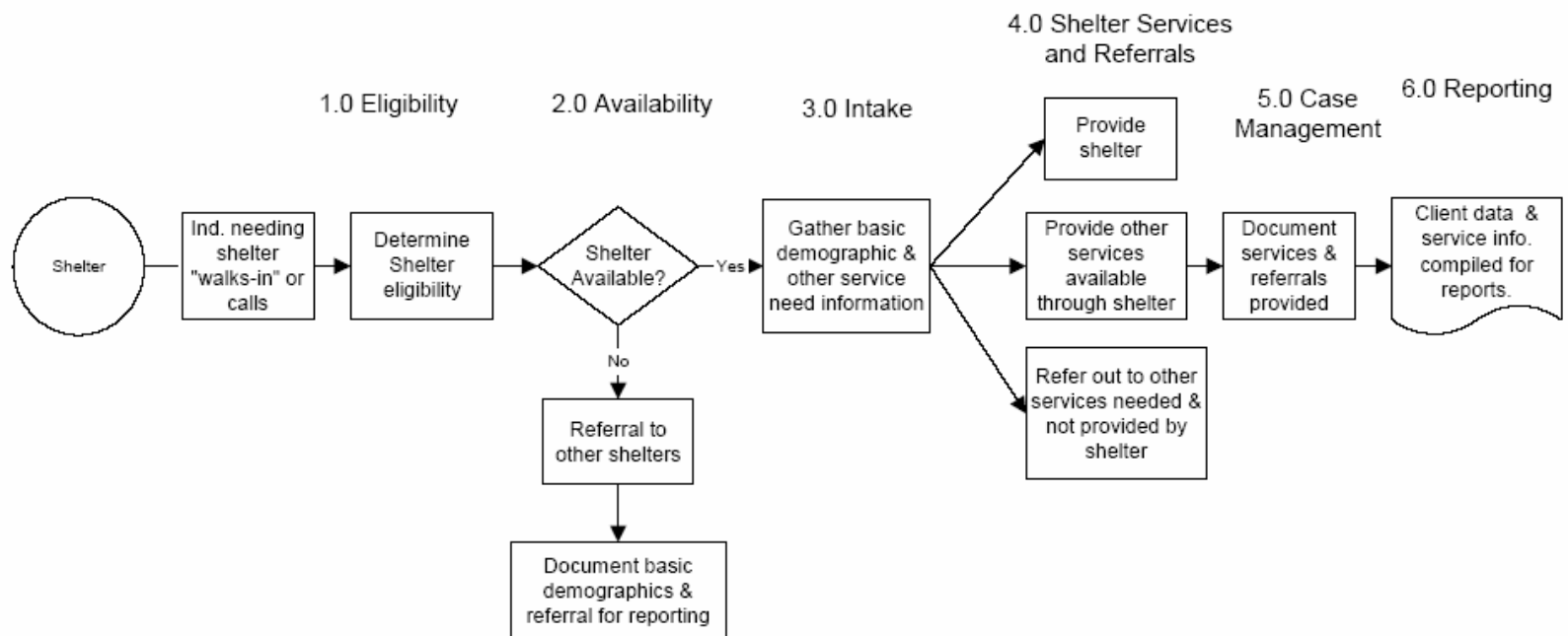
Process Mapping



What Changes Should be Made?

- Does the process need to be adjusted?
- Can the process be made more efficient?

Example Service Delivery Model: Shelter



Defining Your “Best Practice” Data Management Model

- How do you currently gather information?
 - Describe your present data management in a flow chart
- How do you want to deliver services?
(What are your best practices?)
 - Describe your ideal service delivery in a flow chart

Budgeting

- Many costs are predictable
 - Staff training
 - Hardware replacement
 - Ongoing relationships with vendors or consultants
- What can you afford?
- What *can't* you afford?
- Budgeting resources

Staff Skills

- Staff skills are essential for long-term success
- Training is an ongoing need
- Working from within is often the best strategy

Necessary Skills

- Gathering data
- Entering data
- Managing data
- Mining data
- Compiling reports

Determine Human Resource Needs

- How many people use your databases?
- What training do they need?
- What security limitations should be in place?
- Is data input from one or more than one location?
- Can existing hardware/connectivity handle the new system?
- Who will support users, hardware, and software?
- How much will that support cost?

Outside Consultants

Outside consultants provide skills that staff lack

- Create original databases
- Make major enhancements to existing databases
- Tie data to other programs
 - Web
 - Accounting
- Work with other technical consultants

Balancing Act for Successful Data Management

Your Organization Has:

- Knowledgeable leadership
- Long-term commitment
- Knowledge of programs & needs
- Desire to increase impact
- Strategy

Tech Experts Have:

- Knowledge of database tools
- Technical expertise
- Tools and resources
- Successful models

To manage data successfully, your organization and technical experts must work together

Looking Long-Term at Successful Data Management

Plan to build internal skills to replace those of the technology experts

Your Organization's Long-Term Skills

- Knowledgeable leadership
- Long-term commitment
- Intimate knowledge of programs and needs
- Desire to increase impact
- Strategy
- Knowledge of database tools
- Technical expertise
- Tools and resources
- Successful Models

Criteria for Success

- Automate best practices
- Understand that technology does not dictate the process
 - The *service delivery* process dictates what technology is used
- Exercise strong leadership
- Encourage participation
 - Involve staff in all stages of design, pilot, and implementation
- Incremental approach
 - Complete one step at a time

What Impacts Leaders' Decisions?

- Are present processes inefficient so that they hurt your organization's ability to work?
- Do outside forces create the need to change (i.e., Mott's list-checking requirements)?
- Can you see obvious benefits to changing?
 - Will you serve more people, raise more money, work more efficiently?
- Do you want to extend your services to the Web?
- Do you want offices or staff in other locations to use the system?

Leadership Decision Points

1. Do you need changes or enhancements to your information system?
2. Do you need more than one system to support your organization?
3. What information do you need; what systems can provide it?
 - Review formal and informal processes
4. What software can do the job?
 - Look for help but trust your judgment
5. What staff skills do you need?
6. What hardware and network requirements do you need?
7. Pilot the system. Does it work?
8. After implementation, what support and improvement will continue to be needed?

Final Thoughts for Leaders

- Demand secure and sound data care processes
- Ensure that data back-ups are a priority
- Invest in developing staff skills
- Document staff training
- Train staff in a number of skills
- Budget effectively
- Prepare to be flexible

Review of the Leadership Section

- Understand information flows
 - Formal
 - Informal
- Develop staff skills for long-term success
- Budget to prepare for future needs
- Use outside consultants if you lack staff skills
- Make leadership decisions about criteria for success

Take a Break

- Take a 10-minute break
- Do not hang up the telephone
- Do not put your phone on hold
- Use *6 to mute (silence) your phone
- When you return from break please type something in the chat window to let me know that you're back

Technology Section Overview

- Prepare data for use with Bridger Software
- Use process mapping
- Determine essential skills for staff
- Continue to develop skills
- Secure your data
- Back up your data
- Find additional resources to help you

Prepare to Use Bridger Insight

- To use Bridger Insight you must be able to:
 - Access data
 - Export data
 - Map (or match up) data fields
 - Name
 - Address
 - Organization

Prepare to List-check with Bridger Insight

Prepare the data

- Grantee data pulled from database or spreadsheet needs to have data fields separated by one of the following characters: *tab, comma, semi-colon, quote comma, pipe, asterisk, @*
- Names can be in separate fields (FirstName and LastName) or in one combined field (Name)
- Each record should include
 - the organization's name and address
 - the primary **project contact's** name
 - the primary **organization contact's** name
- The more complete and accurate the data, the quicker and easier the list-checking process will be

Other Uses for These Skills

A stable database will:

- Make list-checking easier and more reliable
- Make it easier for you to share your information with funders or others that require reporting from you
- Allow you to take advantage of other tools to use and analyze your data
 - Mail Merge
 - Microsoft Excel
 - Migrate data to and from other programs
 - Restore your data after a security breach or computer crash

Look for Strategic Opportunities

- Do you have work-arounds you could automate?
- Look at your flowchart. Where can you increase efficiency?
- Has your organization's needs outgrown your present technology?
 - SQL
 - MySQL
 - Access
 - FileMaker Pro
 - “Off the Shelf”
 - Donor Management
 - Finances
 - Some Client tracking
 - Reporting
 - Others?

Staff Skills

You, or another staff member, should be able to:

- Export all data, or chosen pieces of data (e.g., *.csv files)
- Use data in other programs like Word or Excel
- Produce needed reports
 - Pivot tables in Excel/Access
 - Queries
 - Crystal Reports

Staff Roles and Responsibilities

- Clearly define staff roles and responsibilities
- Discuss changes to the database or spreadsheets prior to making changes
- Determine who “cleans up” data
- Decide how long records should be kept
- Plan for archiving old data

Secure Your Data

- Database or local object security
- Local PC-based security
- Network security
 - Users and groups
 - Password management
- Internet Security
 - Firewalls
 - www.grc.com
 - Internet use policies

Back Up Your Data

Make regular copies, especially before alterations and after data entry

- On local PCs
- On other drives
- On other media

How to Back Up Your Data

Always take copies off-site!

Tool	Is it Universal?	Does it Serve Other Purposes?	Does it have a High Capacity?
Tape	No	No	Yes
CD/DVD	Yes	Yes	No
Other PCs	No	Yes	Yes
USB Drives	Yes	Yes	Yes
USB Devices	Yes	Yes	No
Internet	Yes	Yes	Yes

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Backups: Things to Consider

- You need more than one option for recovering accounting, databases and other mission critical information
- If you have multiple back-ups, including archives, you have multiple ways to restore the data
 - A live version
 - A copied version on another PC
 - An archived copy on CD
 - A copy on your regular back-up system
- Disaster recovery article

Tour of Resources

<http://www.techsoup.org>

- Articles on databases

<http://www.techsoup.org/mott>

- Information on the Mott project
- Bridger training materials
- Data care training materials

Technology Section Review

- Prepare data for use with Bridger Insight
- Use process mapping
- Determine essential skills for staff
- Continue to develop skills
- Secure your data
- Back up your data
- Find additional resources to help you

Wrap-Up

- Remaining questions?
- What you will do next
- Workshop evaluation

Help and Resources Available

- Through CompuMentor
 - Project Resource page at www.techsoup.org/mott
 - E-mail questions to mott@compumentor.org
- For organizations outside the U.S., direct assistance visit from a regional technology provider
- Web links
 - Council on Foundations, *Handbook on Counter-Terrorism Measures: What US Nonprofits and Grantmakers Need to Know*, <http://www.cof.org/files/Documents/Publications/2004/CounterTerrorismHandbook.pdf>
 - US Treasury – Office of Terrorism and Financial Intelligence, <http://www.ustreas.gov/offices/enforcement/key-issues/protecting/index.shtml>

Now that this Training is Over

- Register to attend a Bridger Software training at <http://www.techsoup.org/mott>
- Attend the Bridger Software training
- For organizations outside the U.S., receive an email or phone call from your regional technology assistance provider to schedule a visit
- Schedule that visit to complete your documentation and to finalize the process that you will use to list-check
- Follow up with your regional technology provider as needed, e-mail mott@compumentor.org, or visit the project resource page for answers to any additional questions.

**Thank you for taking part in
today's training!**

Your opinion is important to us. We
will send you an email link to a
survey where you can tell us if this
training was useful.

Remember...

For more information, visit
<http://www.techsoup.org/mott>