coffee and quality

United Way Greater Houston

From Data to Action:
Strategies for Quality, Usability, and Impact

Introduction

Jessica Davison

THE WALL STREET JOURNAL.

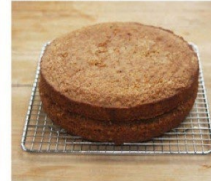"For starters, I think we should find out who made the coffee that day."

Data | Information

Presentation | Knowledge

TEXAS EVALUATION NETWORK

AMERICAN EVALUATION ASSOCIATION

DATA VISUALIZATION SOCIETY

Welcome

Grow where planted: Conditions

Photo Credit: Daniel Benoit

Leadership buy-in and support for using data and evaluation

Resources including staff that are allocated and/or committed to data and evaluation practices

Commitment to continuously learning and growing as an organization

Established data and evaluation practices

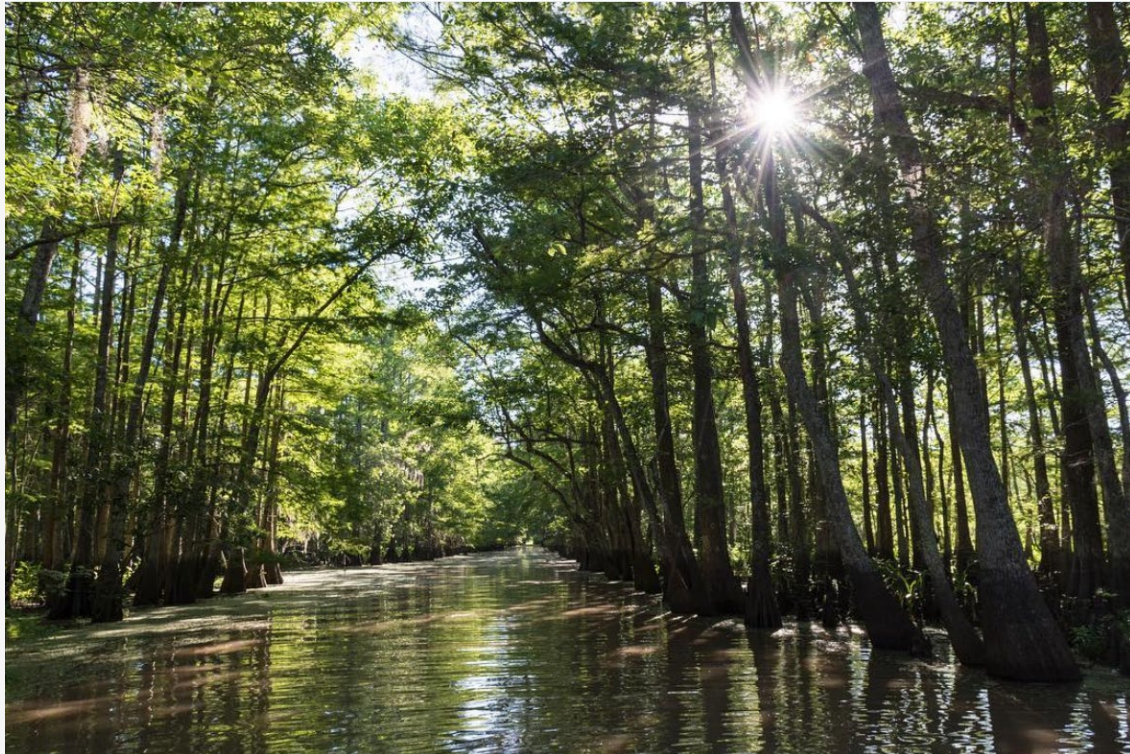# Grow where planted: Practices

Photo Credit: Daniel Benoit

Strategies for collecting and using data

Logic models

An evaluation and Continuous Quality Improvement (CQI) plan

A data dictionary (i.e., codebook)

Documentation on procedures for analysis

Measurements of outputs, outcomes, and targets

Visualizations of results from data analysis to communicate value

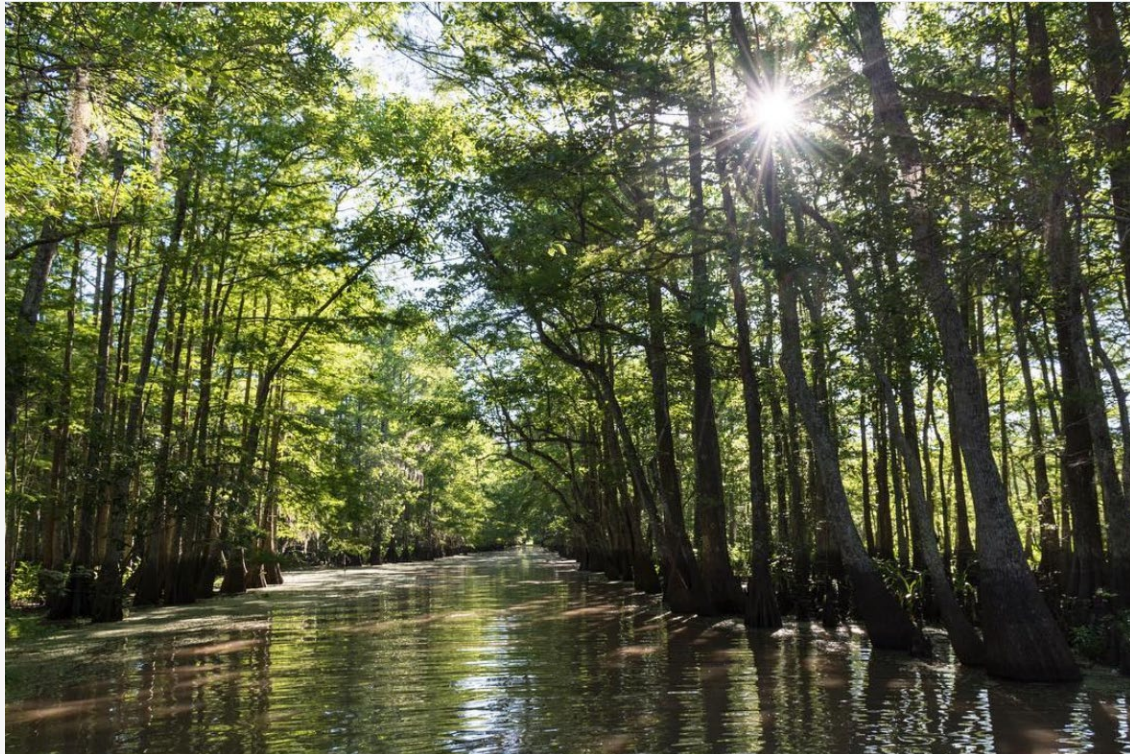# Grow where planted: Practices

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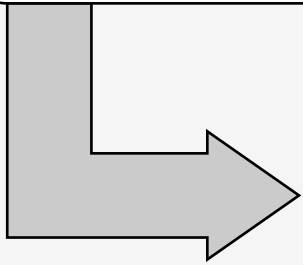
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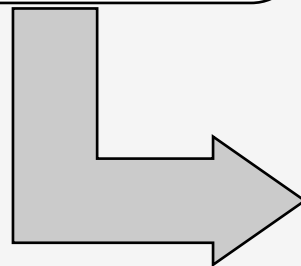
Data practices that support quality data

Data strategy

- is a vision (purpose) for how your program will collect, store, manage, share and use data

Data inventory & procedure

- tells you what type of data you have, where it's located, and what you do with it (documentation on procedures for analysis)

Data dictionaries

- tells you specifics for the individual data records and what they contain (valid values, recode values, full text descriptions)

Dirty data

Inaccurate data that **disrupts** your database and **negatively impacts** the <u>integrity</u> and <u>usability</u> of your data.

Photo Credit: Fourth of July generates more than a ton of trash at one Douglas beach in Lake Tahoe

Most common types of dirty data

Duplicate Data
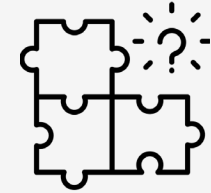
Repetitive leads and account information

Insecure Data

Not compliant to regulations

Outdated Data

Old and irrelevant information

Incomplete Data

Missing records or values

Inaccurate Data

Fake or unreliable information

Inconsistent Data

Non-standard values

Hoarded Data

Unused data, or data that is multiple locations

Source: Nektar's Watch Out for These 8 Types of Dirty Data in Your CRM in 2024

Guess the dirty data

A nonprofit organization has two records for the same client in their database. One record is under "John Smith" and another under "J. Smith," leading to confusion across program teams.

Duplicate

An employee stores a file containing unencrypted donor credit card information in a shared cloud folder, exposing sensitive data to unauthorized staff members.

Insecure

A nonprofit continues to use a list of email contacts from 5 years ago for their newsletter. Many addresses are no longer valid, resulting in bounced emails and missed outreach opportunities.

Outdated

A survey dataset lacks responses for the question about household income, making it difficult to analyze the relationship between income and education level.

Incomplete

A data entry mistake results in a donor's contribution being recorded as $1,000 instead of $10,000, leading to incorrect financial reporting.

Inaccurate

In one database, a client's state is recorded as "TX" while in another, it's written out as "Texas," leading to challenges in merging datasets for analysis.

Inconsistent

A program manager keeps detailed donor engagement notes in a personal spreadsheet instead of the shared CRM system, making it difficult for others to access important information when needed.

Hoarded

Tips for keeping data clean

Duplicate Data
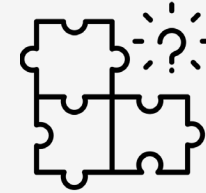
Run a check and merge duplicates

Insecure Data

Delete unusable records and use legally-compliant software system

Outdated Data

Purge before important to new systems

Incomplete Data

Automate data capture for comprehensive records

Inaccurate Data

Monitor data entry points, curb arrival in the system

Inconsistent Data

Follow a centralized approach and standard file-naming conventions

Hoarded Data

Focus on data for critical periods and remove everything else

More tips to support data integrity

Metrics

- Accuracy and precision
- Completeness
- Consistency

Spot checking

- Dependent or related fields
- Identify rules
- Identify potential issues
- Verify with source

Descriptive Statistics

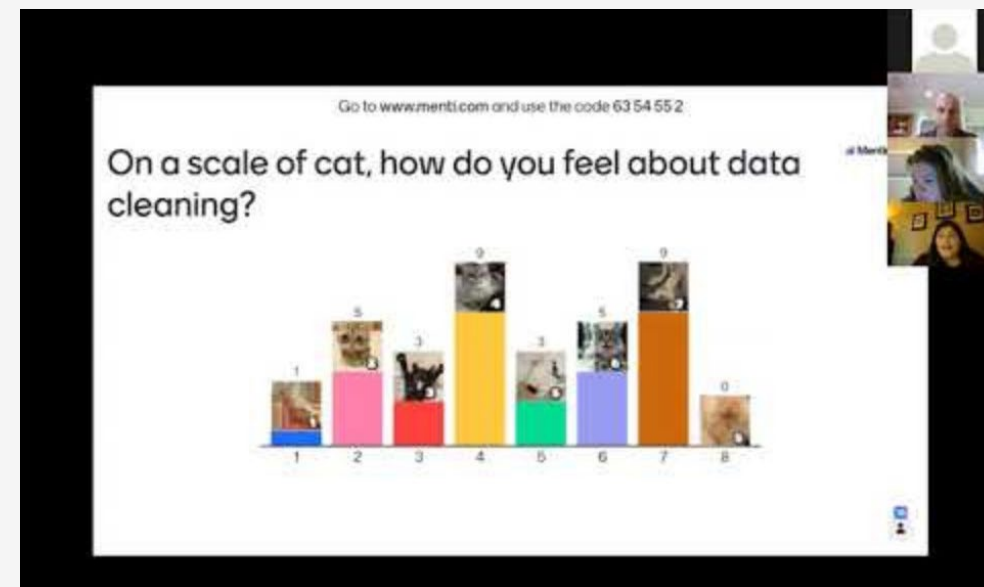- Count
- Mix/Max
- Average/Mean
- Standard Deviation

Compare results

- Previous results
- Expected results

Learn and grow with Coffee & Quality

Watch the Coffee & Quality virtual session

Watch the Coffee & Quality virtual session

Guided by data and research, the integrated client journey (ICJ)
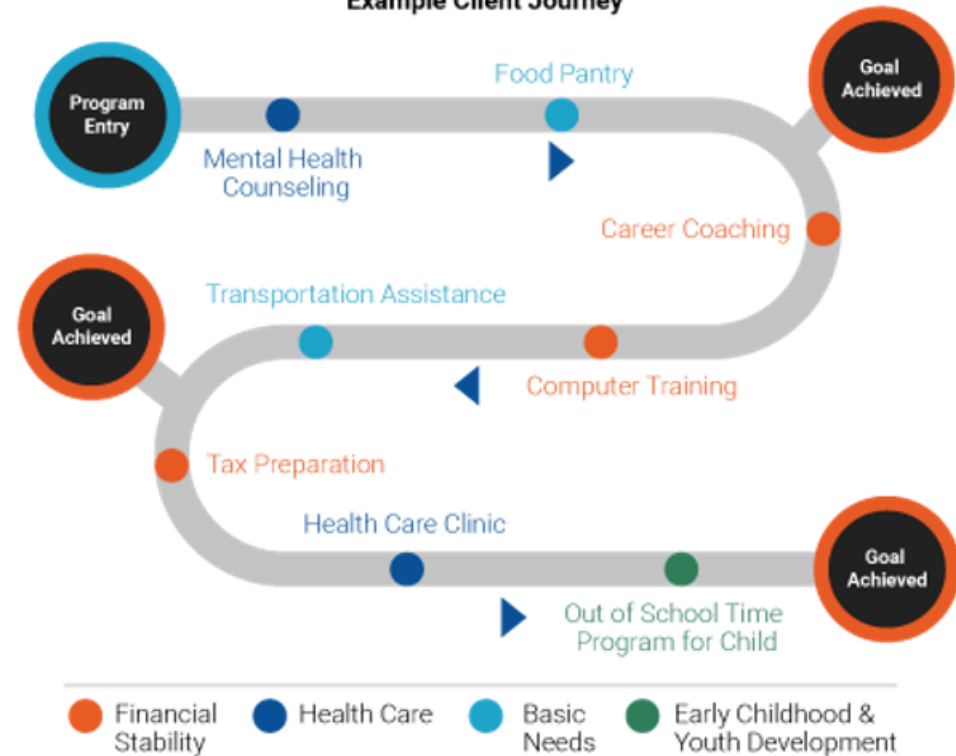
Using data for action

717,482

Collaborative effort brings about **more clients served**

Year 2
219,372

Year 1
140,113

Year 2
91,083

Year 1
66,680

Financial Stability   Basic Needs
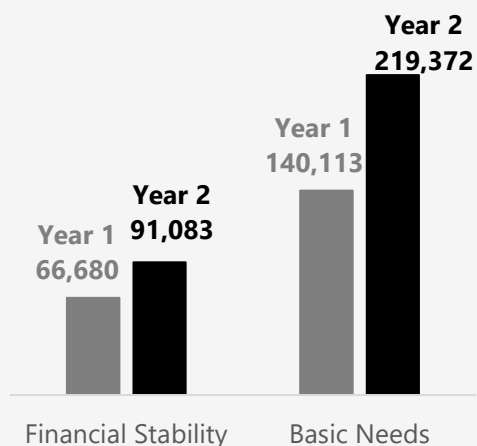
Overall, individuals **increase their self-sufficiency and well-being** as they journey toward financial stability while working with a navigator
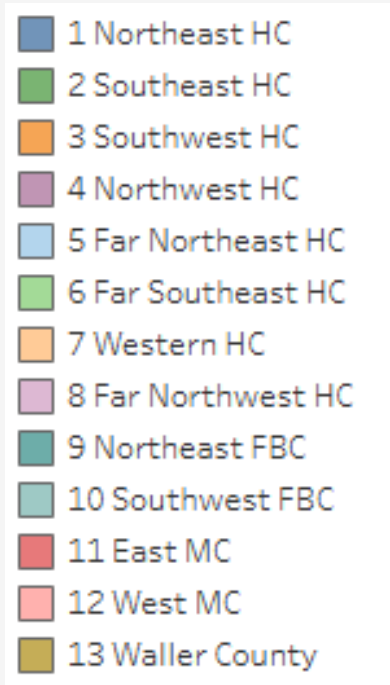
Self-Sufficiency and Well-Being

61.7   67.2   68.7

Baseline   6-Month   12-Month
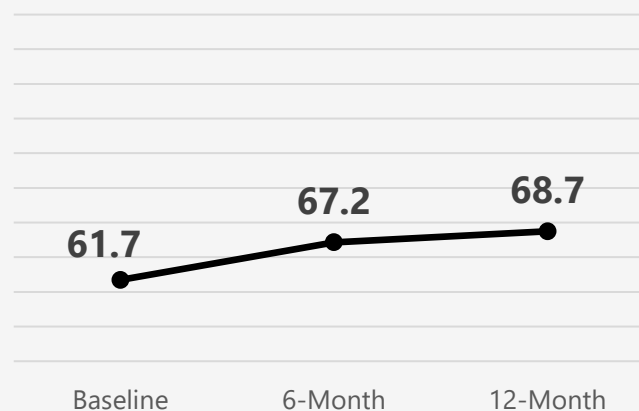
Legal services as critical need for clients on their path to financial stability

Notes: Year 1 date range is April 1, 2022 – March 31, 2023; Year 2 date range is April 1, 2023 – March 31, 2024
Average score on self-sufficient and well-being matrix (SSWB) as total score at enrollment as baseline to 6-month and 12-month follow-ups.

Using data for action (from)

Regional Approach using ALICE data, 211 data and community-level data

1 Northeast HC
2 Southeast HC
3 Southwest HC
4 Northwest HC
5 Far Northeast HC
6 Far Southeast HC
7 Western HC
8 Far Northwest HC
9 Northeast FBC
10 Southwest FBC
11 East MC
12 West MC
13 Waller County

Using data for action (to)
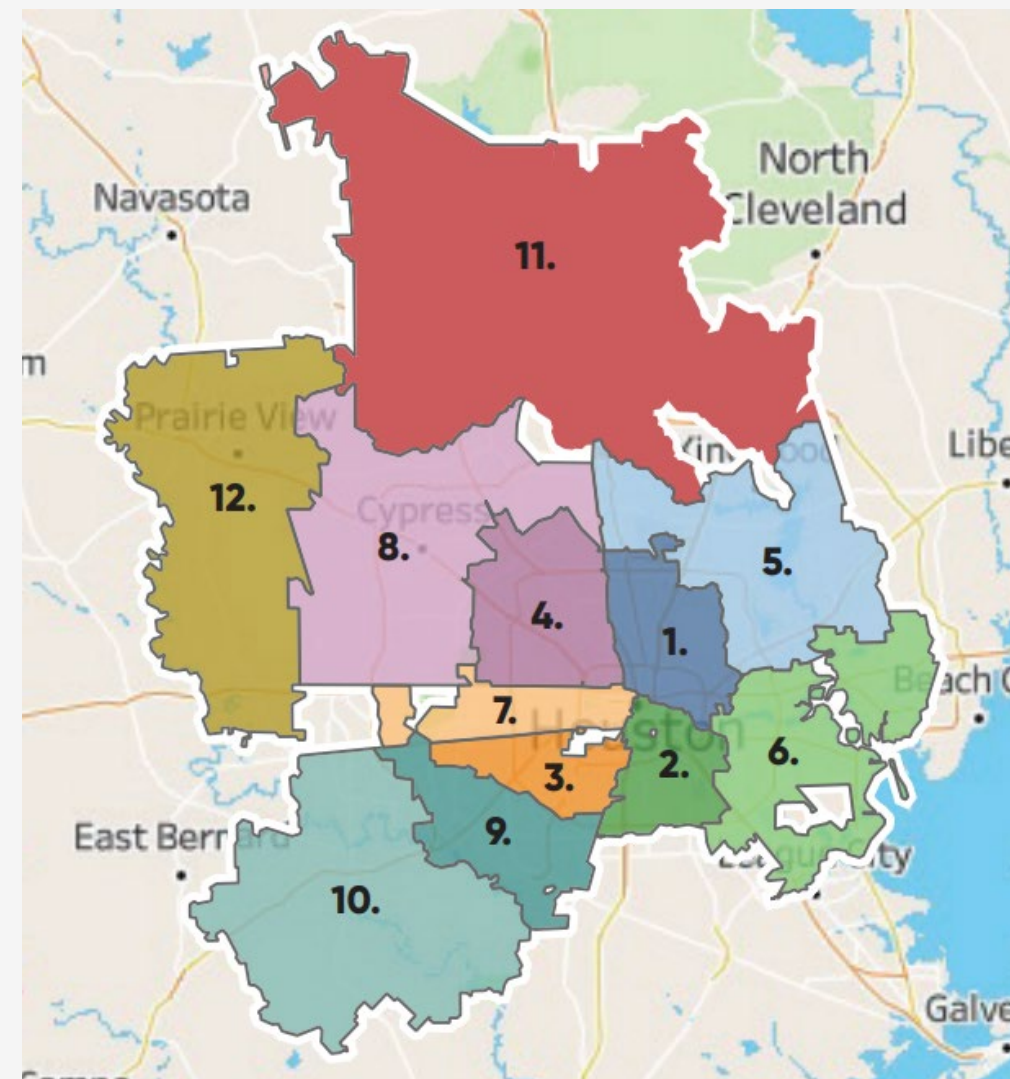
Reflection – One minute
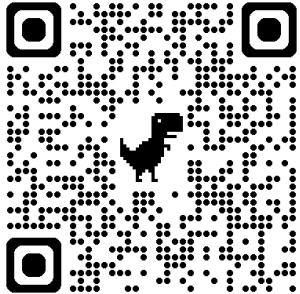
One key takeaway you learned

One question you still have

One action you will take based on what you learned

Photo Credit: Paree Prejean

Opportunities to engage with Coffee & Quality

United Way **®**
Greater Houston

- Attend **Coffee & Quality quarterly sessions**
- **Check out introductory videos** for basics on data, evaluation and CQI
- Explore library of **past Coffee & Quality recordings**
- Dig into **findings from Case Study** via webinar and research brief
- Watch out for **Fellows Program & Learning Cohort applications**
- Go to webpage **www.unitedwayhouston.org/coffee to learn more**