NONPROFIT WEBINARS

Data-Driven Decision-Making for Nonprofits

Rena Cheskis-Gold

November 28, 2012

Twitter Hashtag - #npweb

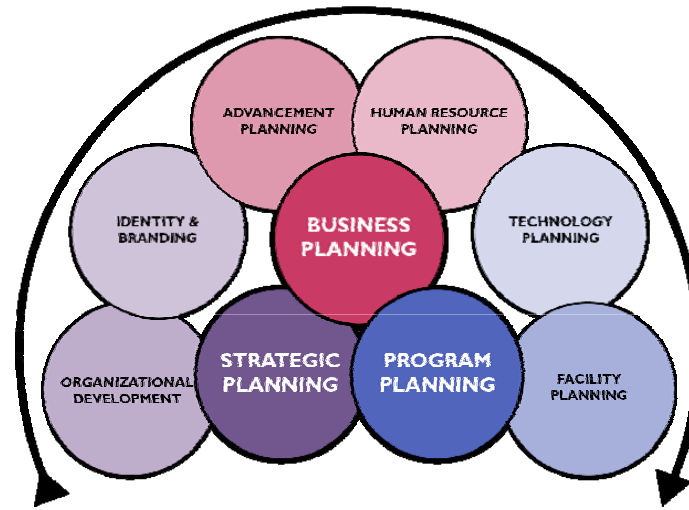# How This Webinar Works

- A link to the slides/materials will be sent in an email after the webinar

- If you'd like to ask a question during the webinar, you can type it in the question box of your control panel on the right side of your screen

- Chat with us on twitter using the hashtag - #npweb

INTEGRATED PLANNING

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Today's Speaker

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Data-Driven Decision-Making for Nonprofits

Rena Cheskis-Gold

November 2012

Webinar for Nonprofitwebinars.org

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"Planning"

Planning isn't just for physical planning

Strategies that deserve a full data-driven decision-making & planning process

- Participant recruitment and retention
- Fundraising strategies targeted to specific populations
- Program development/assessment/ evaluation and outcomes
- Grant writing/renewal
- Alumni connection, and event-planning
- Revising communication materials

Webinar Schedule

- Introduction

- 12 process steps

- 1-page project brief

- Data steps: more detail

- Your input and questions

The Tale of Community Center Classes

Problem: Will a new online delivery method be effective and popular?

FALL 2012
Program Guide

12 Basic Planning Steps

- Articulate
- Mission and Goals
- Stakeholder Input
- Existing Data
- Benchmark
- Report
- Present
- Planning Steps
- Communicate
- Implement
- Assess
- Modify

Data Steps

Background

Articulate
Mission and Goals
Stakeholder Input
Existing Data
Benchmark
Report
Present
Planning Steps
Communicate
Implement
Assess
Modify

Step 1: Articulate Problem

- Underlying vs. Immediate
- Influence vs. Accept
- Challenges and Opportunities

Step 2: Clarify Mission and Goals

- Definitions
- Examples

Data

Articulate
Mission and Goals
Stakeholder Input
Existing Data
Benchmark
Report
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Planning Steps
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Step 3: Stakeholder Input

- Interviews
- Surveys
- Focus Groups

Step 4: Existing Data

- Administrative software
- Other collected data

Step 5: Benchmark

- Types

Other types of Data

Report & Present

Step 6: Report

- Analysis: Simple vs. Complex
- Tech Topics
- Integrate
- Strategy

Step 7: Present

- Style
- Audiences
- Feedback

Articulate
Mission and Goals
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Outcomes

Step 8: Planning Steps

- Incorporate feedback
- List strategies
- Prioritize strategies
- Refine project brief

Step 9: Communicate

- Who needs to know?
- Community building
- Marketing Moment
- Tech Topics

Step 10: Implement

- Begin core strategy!

Assessment

Step 11: Assessment

- Match to goals
- Measurement of achievement
- Unexpected achievement
- Tools

Step 12: Modify*

- Prioritize
- Set up to Succeed

* See Planning Steps

Clarify Process

Project Brief

- Consolidate thinking on one-page
- Practical, not theoretical

Articulate

Mission and Goals

Stakeholder Input

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8-Step Project Brief

Background	What was the catalyst for the project? Why Now? Opportunities? Challenges?
Goals	What is to be accomplished? What is the methodology to be utilized?
Population	Who is the project about, and for? Is there a priority population for the plan?
Message	In the end, if you had 5 minutes to present to the Executive Director or Board Chair, what would that slide say?
Deliverables	What is needed to get your message across to your audience, e.g., a full report, just charts with text, illustrations, statistics/quotes, just bullet-pointed slides?
Timeline	Is there an end date for the project that is tied to a calendar date? Seasonal? If this is a repeating process, is there a specific season to target, or to avoid?
Budget	What is the proposed budget? Where will the money come from? How much room is there for budget overrun?
Staff	Which internal constituents/offices need to be represented in the process? Will this process be done in-house, with consultants, or a hybrid?

| Articulate |
| Mission and Goals |
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| Planning Steps |
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| Assess |
| Modify |

Deeper Look: Stakeholder Input

- Interviews
- Surveys
- Focus Groups

- No pre-set 'order' of methodologies
- Feedback loop from one to the next
- Each requires own Process Brief – who will be doing each task, timeline, etc.

Surveys

When to Do a Survey?

- Representative population
- Subgroup analysis

3 Purposes of a Survey

- Baseline
- Marketing message
- Builds community

Washington University in St. Louis *Off-Campus Housing Study*

We thank you in advance for participating in the WUSTL Undergraduate Student Off-Campus Housing Study.

A few details about the survey:

The survey has 6 sections and it is very important to us that you complete all of them. Please be sure to click 'SUBMIT' at the end of the survey.

You may exit and return to the survey at any time using the link provided in the original email.

If you experience any technical problems with the survey, please email HousingStudy_Support1@wustl.edu. General comments and non-technical questions about the survey may be submitted to UG_HousingStudy@wustl.edu.

Your participation in this survey is important for helping us to develop a meaningful off-campus housing community for undergraduates. All survey responses will be treated confidentially.

[Next Page] 5%

Questions? Please contact HousingStudy_Support1@wustl.edu.

Cautions of Survey Design

Articulate

Mission and Goals

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Modify

- Actionable questions
- Meaningful scales
- Limit open-ended responses
- Don't overburden

Scales

Option 1	--->	Poor	Fair	Neutral	Good	Excellent
Option 2	--->	Poor	..	..	..	Excellent
Option 3	<---	Excellent	Good	Neutral	Fair	Poor
Unacceptable		Poor	Good	Very		Excellent

Survey Tech Topics

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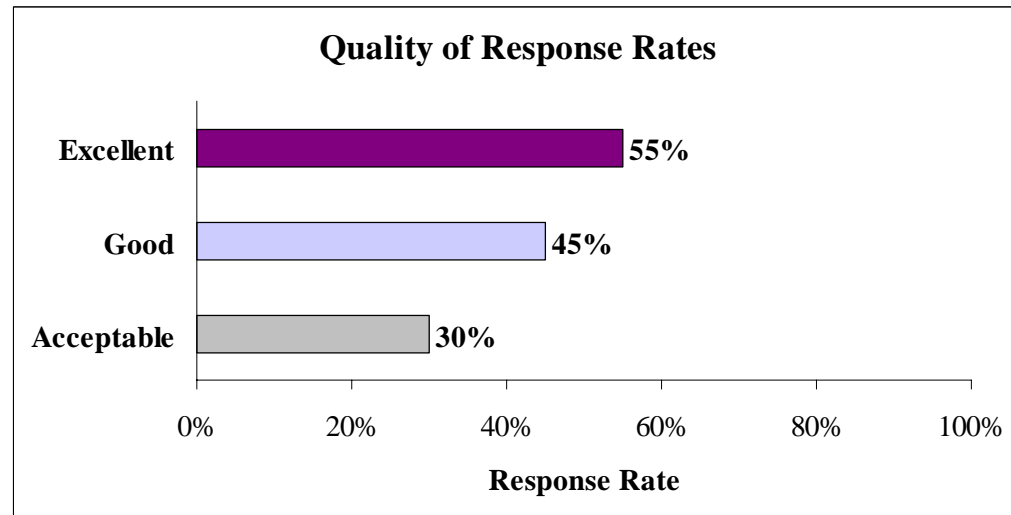
Planning Steps

Communicate

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Modify

- Pick best tools *
- Boilerplate Charts
- Pre-Test
- Response Rates & Follow-up

*Selected Tools:
- QuestionPro
- Qualtrics
- SurveyGizmo

Quality of Response Rates

	Response Rate
Excellent	55%
Good	45%
Acceptable	30%

Response Rate (0% — 20% — 40% — 60% — 80% — 100%)

Focus Groups and Interviews

Definition

- Not representative
- Complex topics
- Quotes and color

Can be conducted at different points in planning process

- Making the case
- Pre-test new ideas

Interviews vs. Focus Groups

Existing Data

Types
- Demographics
- Other Statistics

Source
- Participant lists
- Program statistics
- Nonprofit management and fundraising software *

*Fundraising Software:
Industry leader: Razor's Edge; Good small option: GiftWorks.

Benchmark

- Comparisons: Competitive, similar, structural, consortial, aspirational

- Best practices and hot topics

Organization	Marketing Materials Online			
	Dates and Cost	Sample Schedule	Scholarship Info	Past participant quotes
Camp A	X	X		
Camp B	X	X	X	X
Camp C	X		X	X
Camp D	X	X	X	

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More Data

Data
• Dashboard

Methodology
• Excel Pivot Tables

• Modeling

• Mapping

• Emerging topics

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Questions?

Articulate

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Thank you for attending.

Rena Cheskis-Gold

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Upcoming Webinars

Dates	Topic
12/4	Create a Story…: Engaging Supporters with Online Video
12/5	4 Simple Steps to Raising All the Money Your Nonprofit Needs
12/11	Text to Donate and the Mobile Revolution
12/12	Issues in Funding & Conducting Activities Abroad
12/12	Perfect Phrases for Fundraising

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