

CanadaHelps Data
Literacy Workshops:
Data made simple

DATA ACTION PLAN

This project was made possible through the generous funding of the Ontario Trillium Foundation, an Agency of the Government of Ontario.

Introduction

Just what is an Action Plan?

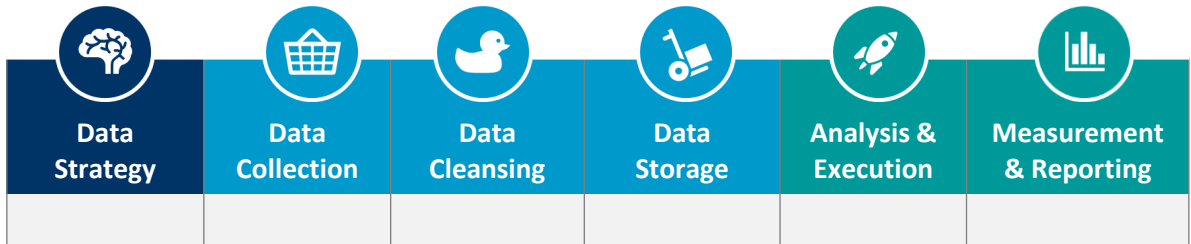
Non-profits should always launch into their fundraising and impact strategies by laying the necessary groundwork. A lack of planning will result in strategies that peter out or miss their goal.

The key to success is always in the preparation. That's why we've created this Action Plan—to help you establish the proper data foundation plan for your fundraising and impact goals and empower you to achieve fundraising success and organizational growth every time. This Action Plan is your guide to putting your data into action. It covers the three main phases of a successful data framework.



Before embarking on any data management task, it's important to assess the strengths and weaknesses of your current process. Invite several team members for input to ensure you're getting the big picture. While every non-profit organization is different, this list of questions can guide you to a conversation about areas in your current data management process that may require improvements. Let's get started!

Creating an Action Plan



Where am I today?

What systems, processes, and people do I have in place across each dimension? What are my areas of strength and weakness?

Where do I want to be tomorrow?

How can I improve my performance across each dimension? What are my short, medium, and long-term goals?

What is my roadmap?

How can I improve/advance across each dimension? What are my low hanging fruit opportunities and what are my larger challenges?

What support do I need?

What are my expertise gaps? What support, training, or assistance do I need across each dimension?

What tools do I need?

Are my current tools effective or do I need to replace them? Are there areas where I need new tools or need to optimize the ones that I currently have?

What specific program can I apply this to?

What programs do I currently have in place that would benefit from advancements in these areas?

Plan

Prepare

Execute



Data Strategy

Establishing a data strategy that meets your business objectives

Data strategy is the process of identifying what data elements will be critical for running the business, and aligning your systems to capture and utilize that data adequately across the entire data framework.

A sound data strategy will allow you to effectively measure the performance of your business and glean insights into what drives that performance.

Where am I today?

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Where do I want to be tomorrow?

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What is my roadmap?

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What support do I need?

•

What tools do I need?

•

What program(s) can I apply this to?

•



Data Collection

Collect data that counts

Data Collection is the process of gathering information across the business such as supporter information, supporter history, program data, survey data, event and financial data.

Collecting data from various sources—and analyzing it—will enable you to get a broader picture of what is driving your business.

Where am I today? •

Where do I want to be tomorrow? •

What is my roadmap? •

What support do I need? •

What tools do I need? •

What program(s) can I apply this to? •



Data Cleansing

Detecting and Correcting

Data Cleansing is the process of standardizing your data in such a way that it is accurate. Key data cleansing examples include deduplication of records, email address standardization, linking donor profiles and categorizing raw data.

Uncleansed data can lead to a misrepresentation of numbers, inaccurate reporting, a poor customer experience, and missed opportunity to communicate with donors (e.g. bad address).

Where am I today?

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Where do I want to be tomorrow?

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What is my roadmap?

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What support do I need?

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What tools do I need?

•

What program(s) can I apply this to?

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Data Storage

Safely and securely storing your data

Data Storage is the method in which you manage and store your data in a safe and secure way.

Where and how you store your data is important when considering how quickly you need to retrieve it for reporting or analysis purposes, and ensuring the security and privacy of the data you are storing (especially donor personal information).

Where am I today?

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Where do I want to be tomorrow?

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What support do I need?

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What tools do I need?

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What program(s) can I apply this to?

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Analysis & Execution

Discovering and acting on insights

Data Analysis is the process of mining, inspecting and manipulating the data with the goal of discovering useful insights and information. Data Execution is the process in which you leverage your data and information to power various initiatives and decision-making.

Applying data to decision-making and initiatives makes it more fact-based and objective, rather than gut-feel and subjective.

Where am I today?

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Where do I want to be tomorrow?

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What is my roadmap?

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What support do I need?

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What tools do I need?

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What program(s) can I apply this to?

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Measurement & Reporting

Understanding your impact

Reporting is the process in which data is presented in such a way to provide key information and statistics on a business, and to track performance on key metrics.

Reporting allows you to track key metrics and provides you with timely information to accurately assess the health of your business and to empower you to make decisions.

Where am I today?

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Where do I want to be tomorrow?

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What is my roadmap?

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What support do I need?

•







What tools do I need?

•

What program(s) can I apply this to?

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Your Action Plan

	 Data Strategy	 Data Collection	 Data Cleansing	 Data Storage	 Analysis & Execution	 Measurement & Reporting
Where am I today?						
Where do I want to be tomorrow?						
What is my roadmap?						
What support do I need?						
What tools do I need?						
What program(s) can I apply this to?						

Execute