

# Choosing a fit for purpose database

- Tips and options for  
small charities



# Current practice

What system/s are you currently using?

Mentimeter



# What are your main challenges?

Reporting

Ease of sharing

Data analysis

Security?

Combining and segmenting data easily

Managing the data all in one place to create meaningful reports

Being consistent across the charity

Working out what our charity and funders will want us to capture.

Collaborative working, date synchronisation, impact reporting, volunteer management, event management

Having everyone training to know how to use the system

Data input and data analysis

Not enough up to date information on clients activities outputs and outcomes. Soft outcome information.

Time consuming to evaluate outcomes and could make better use of our donor data

Time resource, people adopting and accepting change, someone to support implementation

Something affordable that ideally does "everything": helps us manage volunteers, donations and programmes.

Donations of goods value

Volunteer value data

Buy in from board, senior management to evolve Lack knowledge to frame problem Need value statement

Affordability

# Session objectives

By the end of this session you'll know how to:

- Define your organisation's system needs
- Select & implement an off the shelf system that is right for your organisation
- Better monitor, evaluate and communicate your outcomes



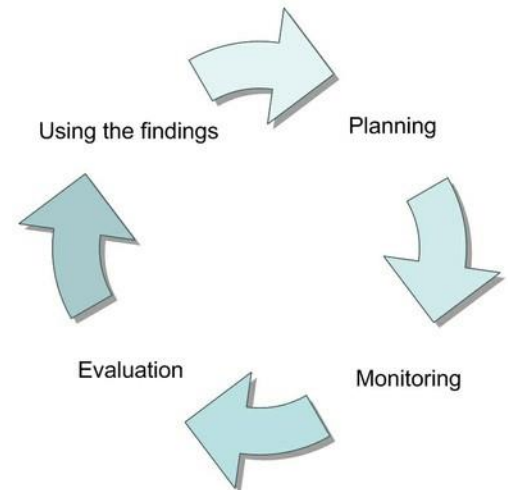
# Getting the buy in...

## Greater efficiency:

- Automating manual processes
- Reducing paperwork
- Reducing staff time

## Greater effectiveness:

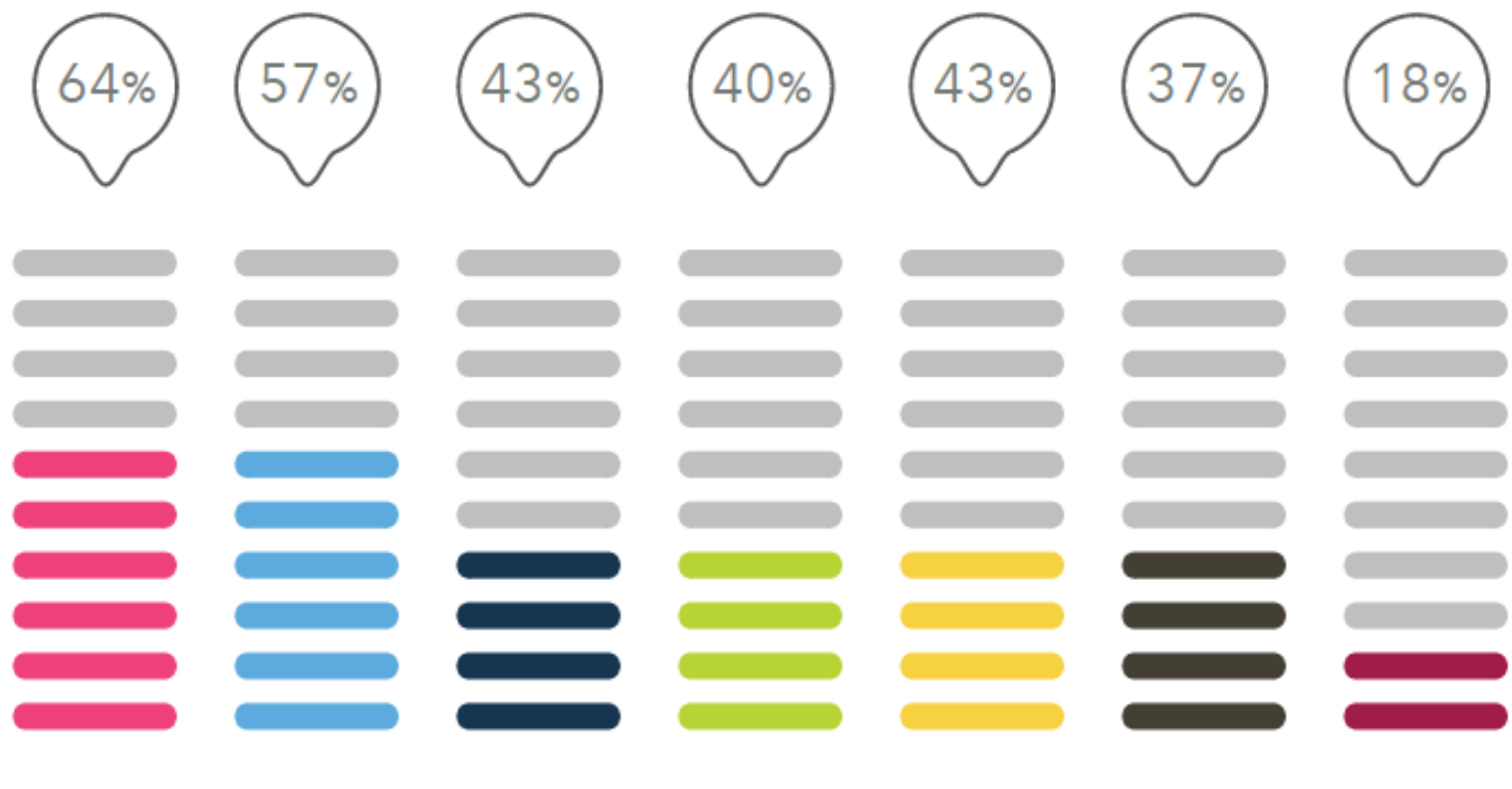
- Sharing / accessing information
- Analysing data in more sophisticated ways
- Presenting information with greater impact & to a wider variety of audiences



# DATA EVOLUTION

## PROJECT

DataKindUK



Have confidence and trust in the quality of their data

Collect the right data

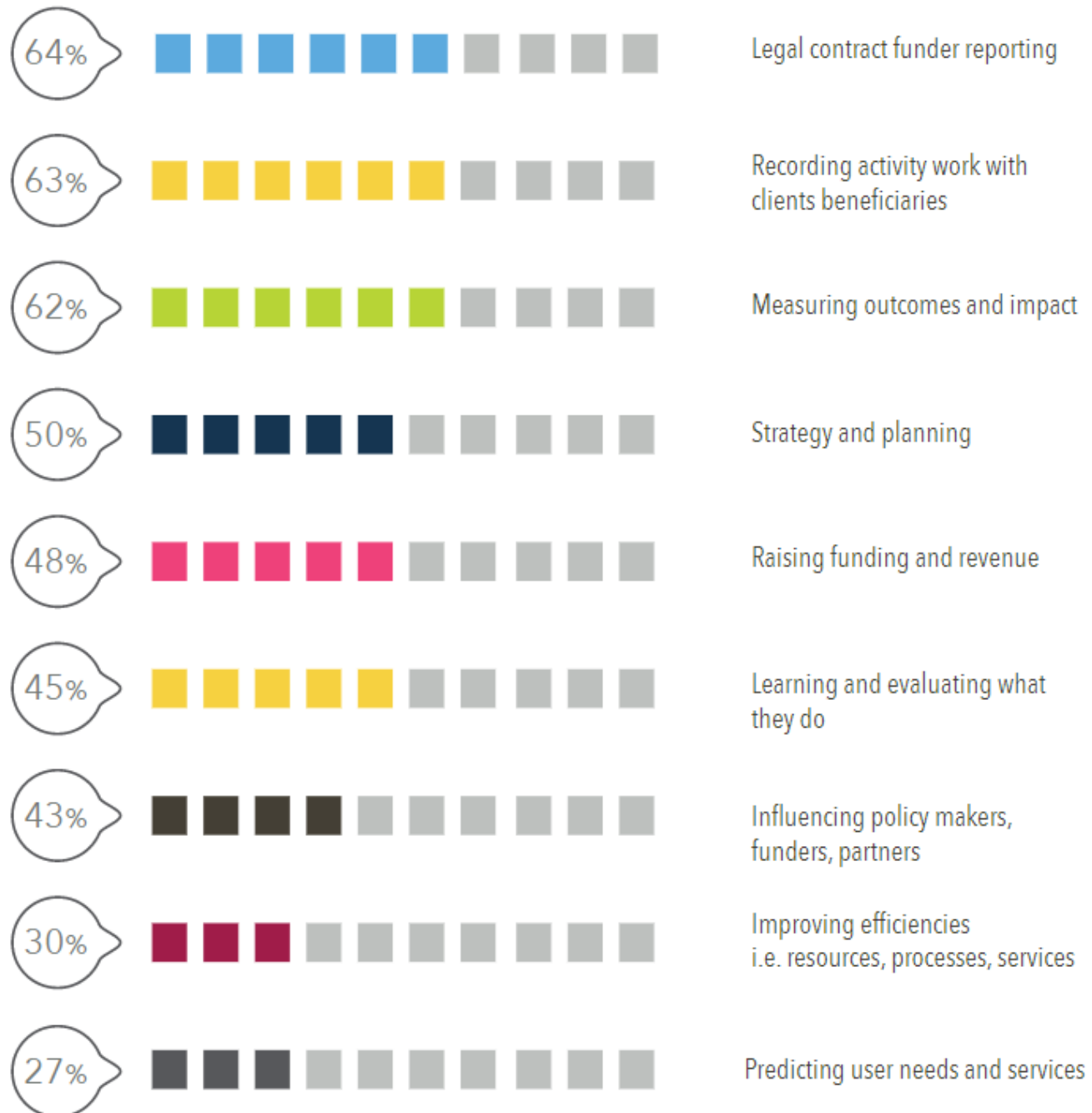
Have the right skills to analyse data in useful and meaningful ways

Have good tools and systems for collecting, managing and analysing data

Have robust data governance i.e. ownership, management, policies, access and control

Say data is accessible to everyone in the organisation that needs it

Invest enough in data related resources i.e. people, skills, learning, tools





## **BENEFITS AND REWARDS**

In our in-depth assessments we had an opportunity to explore in more detail how social sector organisations were translating the use of data to achieve benefits and rewards. In all cases there were slight, moderate or very significant benefits for at least two-thirds of the assessed organisations. The biggest areas of benefit that most organisations said they experienced either 'moderately' or 'very significantly' were:

**IMPROVED PRODUCTS AND SERVICES.**

**INCREASED KNOWLEDGE AND LEARNING.**

**IMPROVED PLANNING AND DECISION MAKING.**

**INCREASED INCOME.**

The most advanced organisations said they benefited 'very significantly' from:

**IMPROVED OUTCOMES AND IMPACT.**

**SAVED MONEY.**

**INCREASED CREDIBILITY AND INFLUENCE.**

**STRENGTHENED PARTNERSHIPS.**



# What difference do you make?

Do you have an [outcomes framework](#)?





## USER DATA

Information on the characteristics of the people you are reaching.

[VIEW MORE](#) ▼



## ENGAGEMENT DATA

Information on how service users are using your service, and the extent to which they use it.

[VIEW MORE](#) ▼



## FEEDBACK DATA

Information on what people think about the service.

[VIEW MORE](#) ▼



## OUTCOMES DATA

Information on the short term changes, benefits or assets people have got from the service.

[VIEW MORE](#) ▼



## IMPACT DATA

Information on the long-term difference that have resulted from the service.

[VIEW MORE](#) ▼



**So you need a  
database?!**



# Choosing the best system for you..

- Data audit – input from across organisation

Database / system name e.g. Member list	Application e.g. Word / Excel / Access / other	Who uses it? (Which staff / project)	What is it used for? Include type of data stored e.g. names, attendances, work carried out	Have any reports been set up to automatically generate? Provide details...	What problems / frustrations do you have using this 'system'?	What would make use of the 'system' more effective?

- System brief – driving factors, reporting needs, support, budget etc
- Shortlist systems & options appraisal
- Select system & provider / Tender process



# Getting it right 1

## Identify needs

- Audit current systems – what you're using, what works well, what frustrates you...
- Develop a brief – what are the drivers?  
Where do you want to be? Remember to future proof



## Getting it right 2

### Involve the team

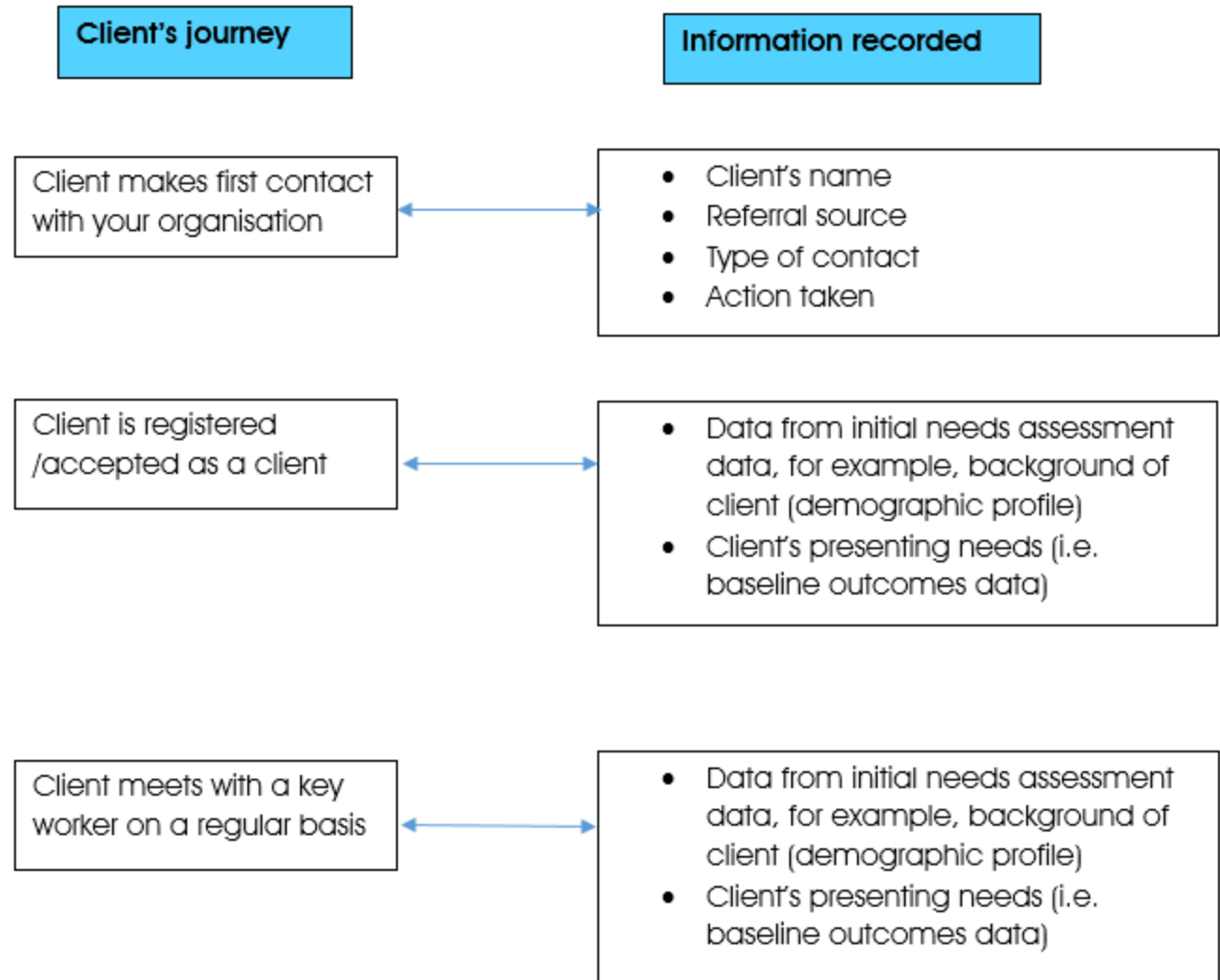
- Benefits?
- Concerns?
- Ideas / opportunities?
- Set up a working group ...



# Client journey / process mapping

## Putting outcomes into practice: data gathering opportunities

Tracking a client's journey through your organisation can help you to identify information collection points that should inform the way you develop your system.





# Getting it right 3

## Selecting options

- Can it be developed in house?
- Does a system already exist to meet your needs?
- If not (are you sure?!), budget for the bespoke option...



The background of the image consists of several overlapping Bank of England £20 banknotes. The notes are yellow and purple, featuring the portrait of Queen Elizabeth II. The text 'Bank of England' and '£20' are clearly visible on the notes. The overall image is framed with rounded corners.

40 / 60 %



# Getting it right 4

Identifying other resources – it's not just the tech tool...

- Upgrade to ICT infrastructure?
- Staff roles & training?
- Costs – upfront / ongoing?
- Evaluation – measuring impact



# Data protection by design & default

- Are you registered with the information commissioner?  
Data Controller? [www.ico.org.uk](http://www.ico.org.uk)
- Do you have a data protection & privacy policy and explain why you collect data and what it will be used for?
- Due diligence on 3<sup>rd</sup> party systems – IT security and GDPR compliance? Cloud computing [ICO guidance](#)
- Is your client data secure i.e. robust passwords, backed up, safeguarded with anti virus software and a firewall? What about remote working & BYOD? [NCSC Infographic](#)
- What about collaboration / data sharing?





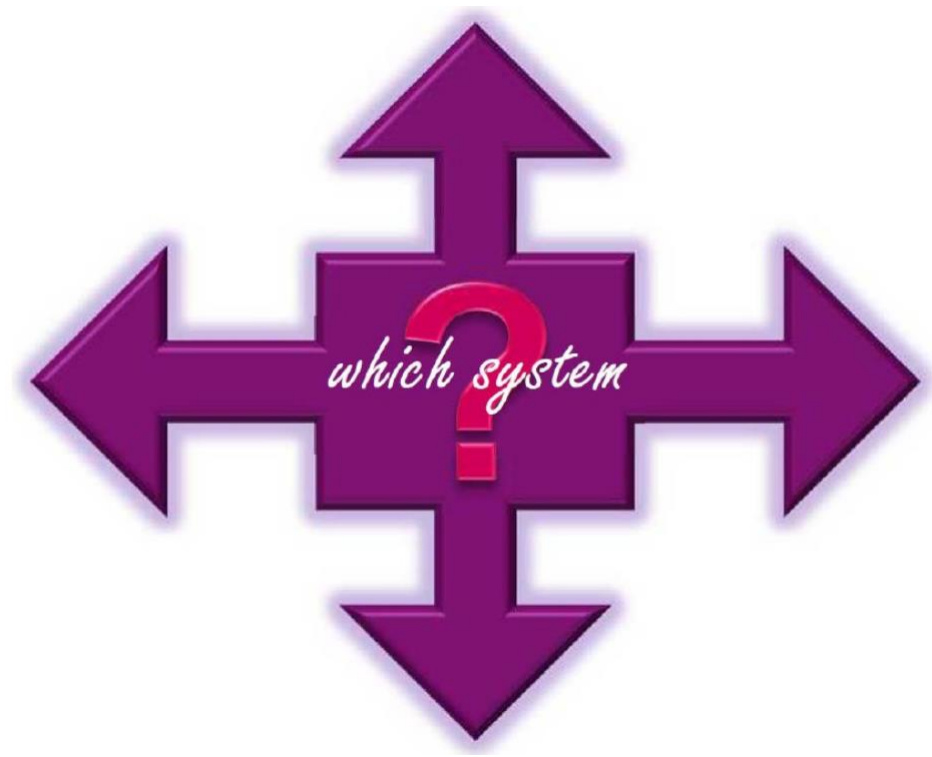
**national  
performan  
programm**

## IT for Outcomes

Selecting a database for monitoring

By Shafiq Meghani

March 2011



[www.scribd.com/document/333535592/IT-for-outcomes-Selecting-a-database-for-monitoring-Meghani-2011](http://www.scribd.com/document/333535592/IT-for-outcomes-Selecting-a-database-for-monitoring-Meghani-2011)





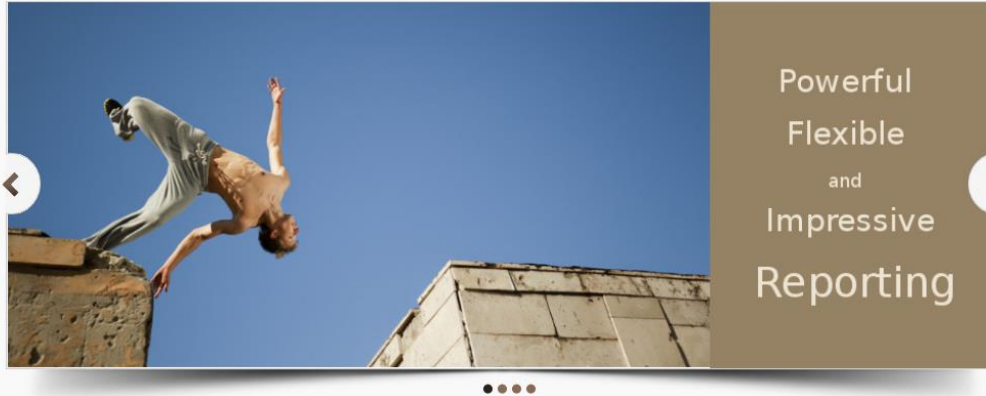
# Affordable off the shelf online databases





## The complete database for charities

Leaving you time for what really matters



### Fantastic Value



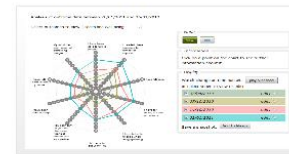
Lamplight is priced to be affordable for all organisations from the very smallest to the largest. With packages to suit any budget, just call us to discuss your needs, or build your package with our pricing calculator.

### Impact at the Core



The ability to monitor and report on your impact has been a key part of the Lamplight core system since the beginning. With interactive radar dials, playback feature and a framework neutral approach you can be sure Lamplight

### Take a look



It's good to know what you're getting. A good database system becomes part of your everyday work flow. With Lamplight you can customise the database to reflect your own organisation's branding, or just use your

[www.lamplightdb.co.uk](http://www.lamplightdb.co.uk)





# Cloud-Based Case Management for the Third Sector

[Request a Demo Now](#)

Charitylog is the comprehensive charity CRM solution for managing your clients and service users in the cloud.

Ensure your organisation is meeting GDPR compliance with ease by using our specialist charity database software to manage the personal information you collect.

Charitylog is a bespoke charity management system. We can put together a package that suits you and makes life easier. Focus less on admin and more on growing your organisation. As your charity changes, so can your software as features can be easily added to scale with your business.

[www.charitylog.co.uk](http://www.charitylog.co.uk)



# evide

Demonstrate the impact and outcomes of your work

## Evide Impact Tracker

Impact Tracker is an online data application designed to help organisations to streamline their project data and gather evidence, simplifying the process of reporting on a project's outputs, outcomes and demonstrating its impact and social value.



[Privacy & Cookies Policy](#)

[www.evide.org.uk](http://www.evide.org.uk)



Views is an online project management and impact reporting platform, developed by social research company Substance. It is for organisations that want to prove their excellence.

#### Contacts



Record data about the people you work with including participants, groups, volunteers, staff and organisations.

#### Work



Record details about the projects and programmes you deliver, including content, objectives and outcomes.

#### Evidence



Upload multi-media files and documents to evidence the impact of your work.

#### Reports



Filter statistics by any number of criteria and generate flexible reports on your data.

[WATCH VIEWS DEMO](#)[VIEWS PACKAGES](#)[BUY VIEWS](#)

[www.substance.net/views](http://www.substance.net/views)



Working hard to deliver  
your community projects?

We can help you prove it!



Upshot is a performance management software solution developed by the Football Foundation, the UK's largest sports charity. It is designed to help organisations delivering and funding community based projects, manage, monitor and evidence their work, and prove their impact.

There are currently more than 650 organisations using Upshot across a wide range of sectors including NGB's, housing associations, universities, local authorities and sport and non-sport charities. Most recent developments have seen Upshot translated into Spanish, Portuguese and Welsh, as we begin to engage with the international non-profit community.



## Manage

We make it easier for you to manage community projects by enabling you to:



## Monitor

We help you monitor the progress of community projects by allowing you to:



## Evidence

We help you evidence the effect community projects have by enabling you to:

[www.upshot.org.uk](http://www.upshot.org.uk)



## Volunteer Software in the Cloud

You're going to LOVE IT and you're going to love working with us.

"We're here to help!"

### Volunteer Impact

**Volunteer management software used by organisations just like yours,  
and built by a team of people who understand volunteer management.**

[www.betterimpact.co.uk](http://www.betterimpact.co.uk)



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ANNOUNCING CIVICRM 4.6 ALPHA1 RELEASE [MORE](#)



A Fully Integrated CRM Solution

- Contacts
- Contributions
- Communications
- Peer-to-Peer Fundraisers
- Advocacy Campaigns
- Events
- Members
- Reports
- Case Management

WHAT IS CIVICRM?

WILL CIVICRM MEET YOUR NEEDS?

GET STARTED

PARTICIPATE



Contributions

CiviCRM makes it easy for you to create contribution forms for multiple fundraising appeals - recording pledges, one-time donations, recurring donations, tribute donations and more. [MORE...](#)



[www.civicrm.org](http://www.civicrm.org)



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Global Good

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People

Resources



Makerble is a management tool which  
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impact

Our mission is to help you change the world faster

Double your team's productivity. Cut your reporting time in half.

Feedback & Support

[www.makerble.com](http://www.makerble.com)







IT'S JUST NICE TO BE ABLE TO TAKE SOME TIME OUT AND TALK TO SOMEONE IN CONFIDENCE, I FIND THESE SESSIONS VERY USEFUL.



### USES SMARTPHONES

A simple to use app which allows your staff to capture outcomes on the move, as they work and where they work

### CAPTURES VOICES

Record your clients' stories, even the 'hard to reach', in their words and in real time to show the impact you have. Enrich that with video, pictures and audio to learn from your clients.

### CHANGES LIVES

Your work helps improve people's lives. This app lets you do that better by turning stories into data so you can improve your own services and influence commissioning and funding.



## WHO IT'S FOR

If you help people, the Impact Assessment app can help you capture your impact.



LOCAL AUTHORITIES

NHS, HEALTH AND SOCIAL CARE

SOCIAL ENTERPRISES

CHARITIES, COMMUNITY AND VOLUNTARY GROUPS

HOUSING BODIES

COMMISSIONERS AND FUNDERS

[www.impactassessmentapp.com](http://www.impactassessmentapp.com)



## A tried and tested tool for measuring change

The Outcomes Star™ is an innovative tool for supporting and measuring change when working with people. The paper version of the Outcomes Star is available free of charge from the Outcomes Star website. This online version gives simultaneous guidance, instant Stars, action plans and reports and is designed to link directly to other client management systems.

[More about the Star Online](#)

## Sign up now

Use the Outcomes Star Online with your service users and get reports on your organisation's outcomes.

[Sign up](#)

## A version for your service

Leading organisations and commissioners have helped adapt the Outcomes Star for their sectors:

### Alcohol Star

[More](#) [Log in](#)

### Homelessness Star

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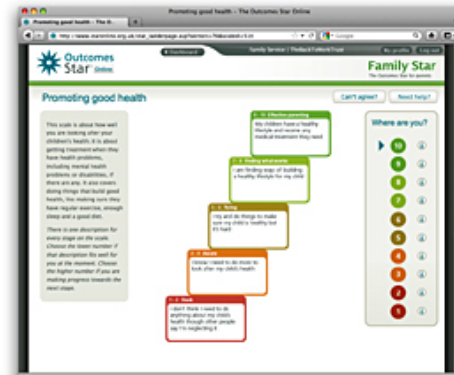
### Older Person's Star

[More](#) [Log in](#)[More versions](#)[www.staronline.org.uk](http://www.staronline.org.uk)

## 30 day free trial

Try out the Outcomes Star Online

Learn more about  
the Outcomes Star



Subscribe to the  
Newsletter



# One tool or many...

Linking & building recipes!



**IFTTT**

**zapier**



# Feedback – CharityLog implementation

- **Efficiencies** *“Implementation of a new case and information management system has streamlined how we record our work on a daily basis and across all of our monitoring and evaluation activities”*
- **Evaluation & Sustainability** *“We use this to inform how we are delivering our services and help us to secure the funding we need to meet the need for help from families”*
- **Scaling up & collaboration** *“This has supported us through our transition from working in one to three boroughs and has now been adopted by 6 other equivalent London organisations. It will help us to deliver joint projects and apply for new funding opportunities working together”*



# Improvements – Salesforce implementation

- Organisation and IT = culture shift
- Remote working = stable and consistent = travel time saver
- Reimagining our programmes = process invites questions, critique of long standing structure
- Team closer to targets, evaluations and seeing their results
- Reporting - 1st completed report without asking team to complete additional Word template!



# Top tips for success (from organisations who've done it)

- *Factor in time to review what needs to be adapted from the very start - let the people using the system know so that they can advise you. This will help staff buy in*
- *Needs to be on team meetings agendas as a regular item*
- *Having a key person to drive things forward (someone who is passionate and competent with data)*
- *Having designated time built in to roles for workers to enable good data collection*
- *Think about the end user - e.g. more sophisticated & knowledgeable staff or low tech savvy volunteers*

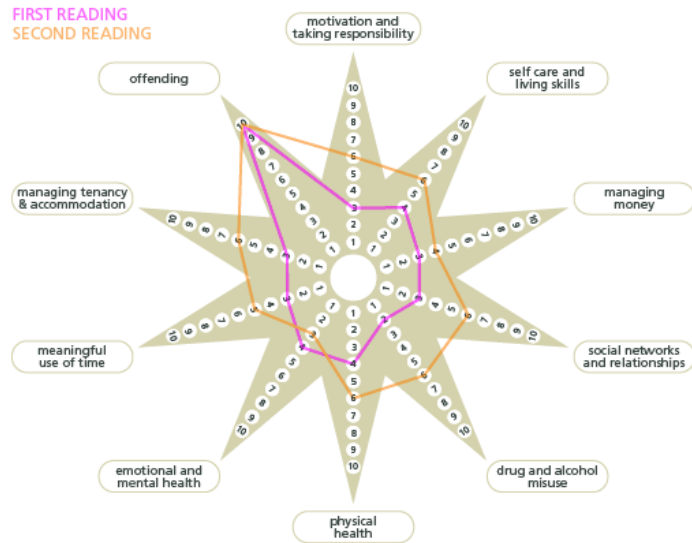


# Top tips for success (from organisations who've done it)

- *Is a database necessary? Could a spreadsheet do the job better?*
- *Test & trial e.g. at the beginning of a new project so you can check it's working and make changes early on*
- *Explore a range of systems and go and see people who are using them now for their experience and challenges*
- *Review regularly - what are the problems & gaps? What are you missing? What are not using it - remove it...*
- *Buddy up with other similar organisations and share learning / support*

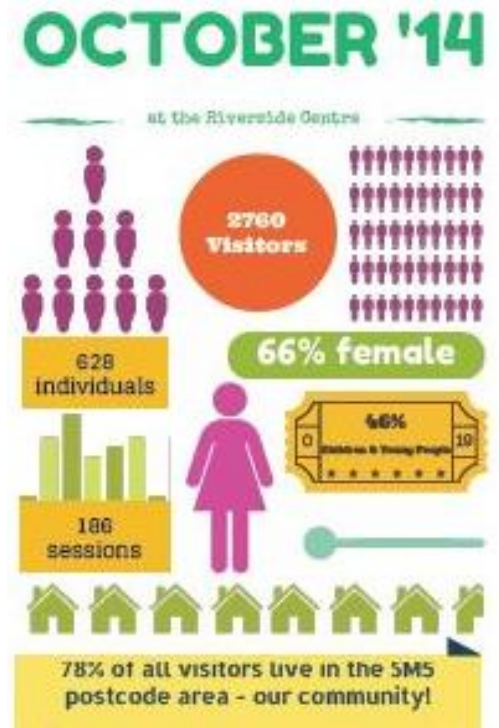


# Presenting your data



The Outcomes Star - Homelessness version

[www.outcomesstar.org.uk](http://www.outcomesstar.org.uk)



[www.canva.com](http://www.canva.com)



[www.piktochart.com](http://www.piktochart.com)



[www.batchgeo.com](http://www.batchgeo.com)



# Data analysis / visualisation - next steps



[Carto](#) – non profit application for the Builder application



[Tableau](#) – non profit discount available via [Tech Trust](#)



[Flourish](#) – free for public maps



[PowerBI](#) – free desk top download or Office 365 app (free subscription for non profits)



**SUPERHIGHWAYS**



# **Digital Leadership 101**

With funding from DCMS, in partnership with London Plus, NAVCA  
and The FSI





# superhighways

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