



Peer Data Webinar Series: Navigating the Landscape of Technology and Data Systems



Peer Presenters:

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Norwescap



The Promise Of Community Action

Community Action changes people's lives, embodies the spirit of hope, improves communities, and makes America a better place to live. We care about the entire community, and we are dedicated to helping people help themselves and each other.

Navigating the Landscape of Technology and Data Systems

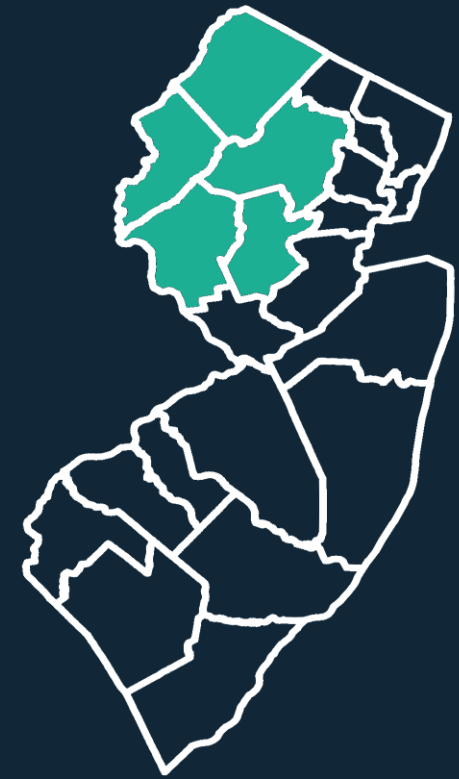


Agenda

1. Introductions
2. The Search Process
3. Building our System
4. Training a Culture Shift
5. Realizing the Benefits
6. What's Next + Q&A

About Us

Our mission is to partner with individuals and families in creating pathways to achieve their hopes and dreams.



Communities where engagement and collaboration lead to empowered lives with opportunity for all.

Serve as a foundation of support to help individuals and families overcome hurdles

Tailored programs to address wide range of unique challenges faced by New Jersey residents

Enable people to build stronger, more stable futures

Norwescap Program Pillars



Helping People
Through Crisis



Helping People
Become
Financially
Secure



Promoting
Health and
Wellness



Building
Stronger
Families



Creating a
Thriving
Community



Presentation Ground Rule

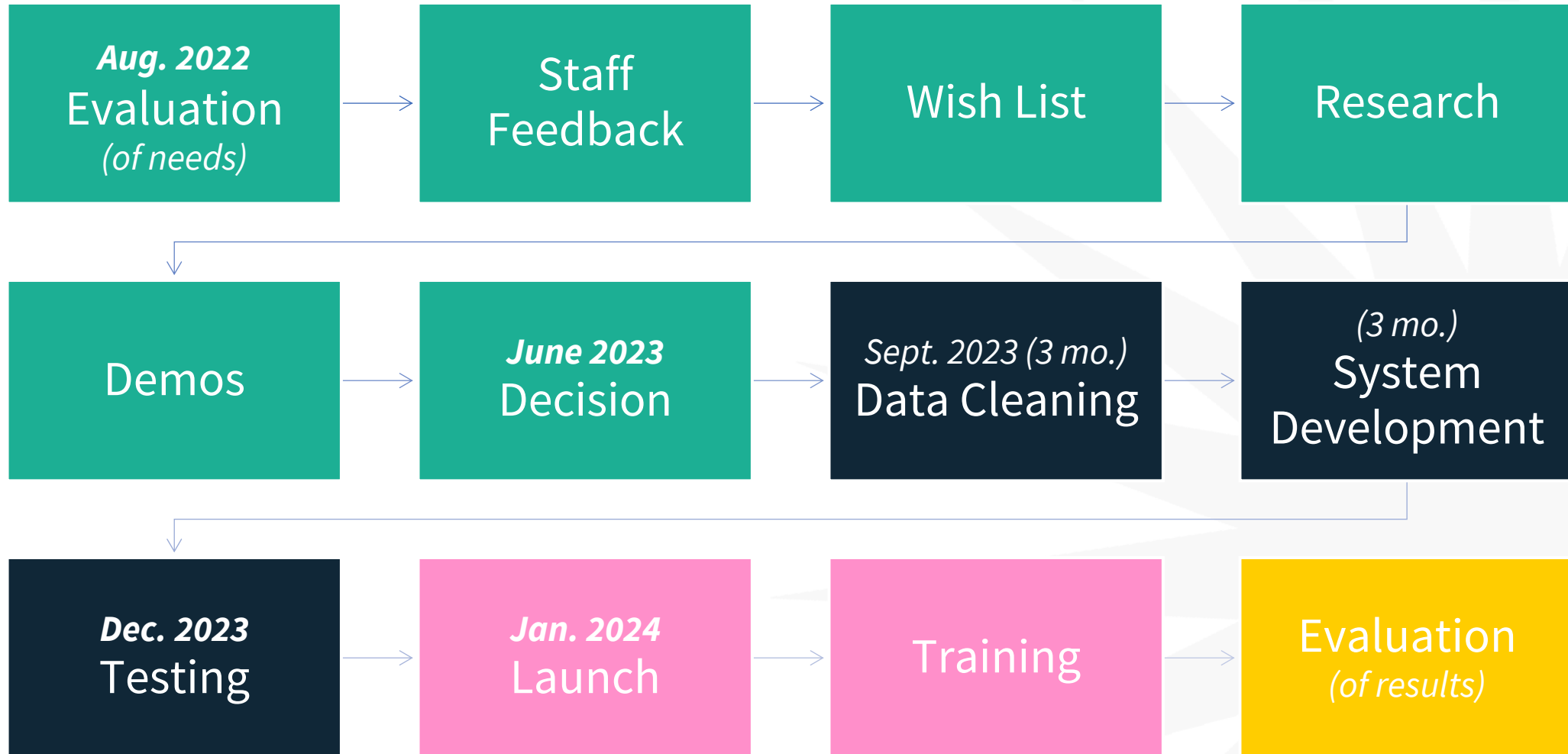
Informational, not Instructional

The Search for a Data System

What is a CRM?

*Practices, strategies and technologies that companies use to manage customer interactions and analyze data with the goal to **improve customer service***

CRM Process Evaluation → Implementation



Why do we need a CRM?

Centralized
Information

Improve Data
Quality

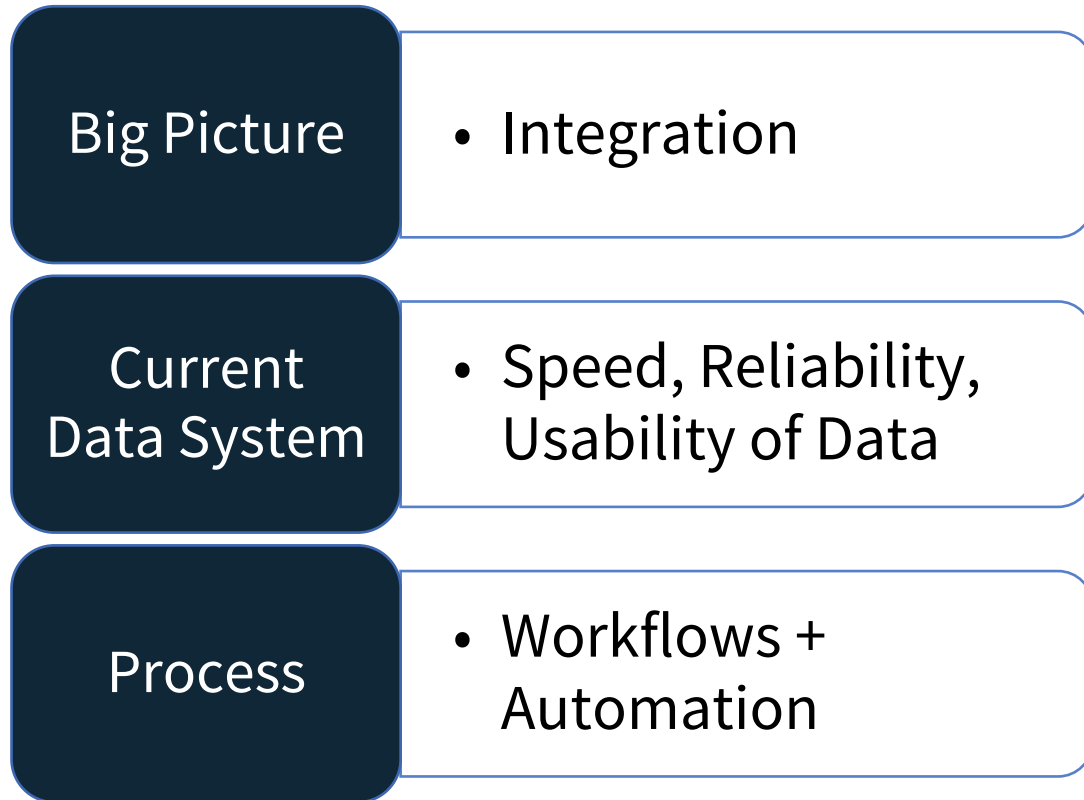
Participants'
Roadmap For
Success

Automation =
Time Savers

Customer
Satisfaction

Staff's Feedback + Wish List

Feedback Results



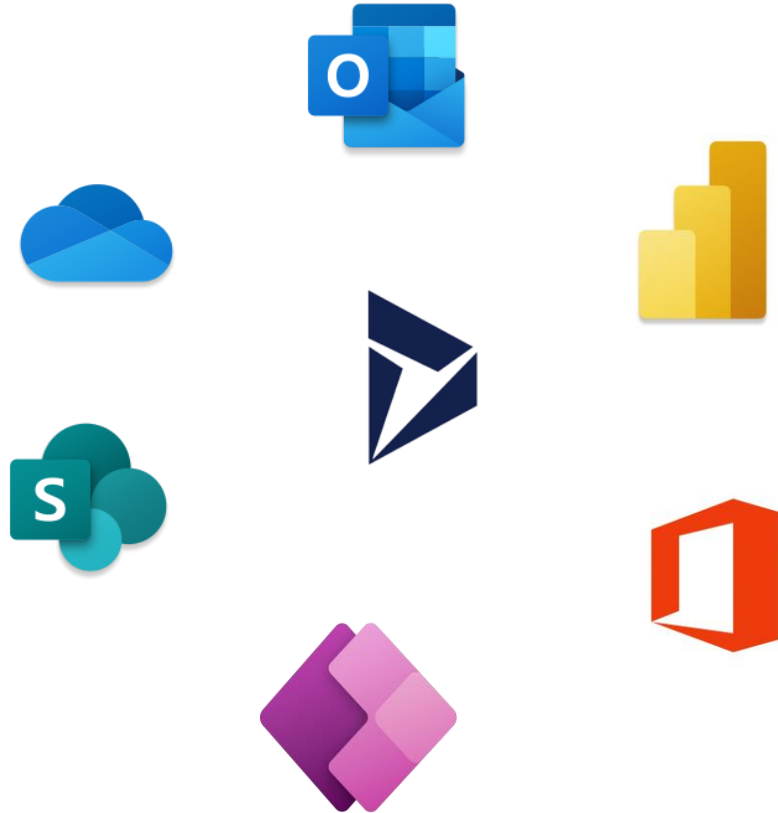
Ideal System

- **Must Haves**
 - Track services
 - Secure and confidential
 - Shared case notes to coordinate activities across staff
 - Easy view of assigned caseload
 - Easy 1-page view of household activity
- **Wants**
 - Tasks: assign, track progress, notify if overdue
 - Onboarding tools: decision tree call center scripts for improved referrals
 - Integration of systems: Microsoft products + required systems
 - Participant portal access
 - Automated assessments and surveys
 - Communication with participants: email, texting, phone calls
- **Nice to Haves**
 - Easy to use goal setting and future planning
 - Eligibility checks

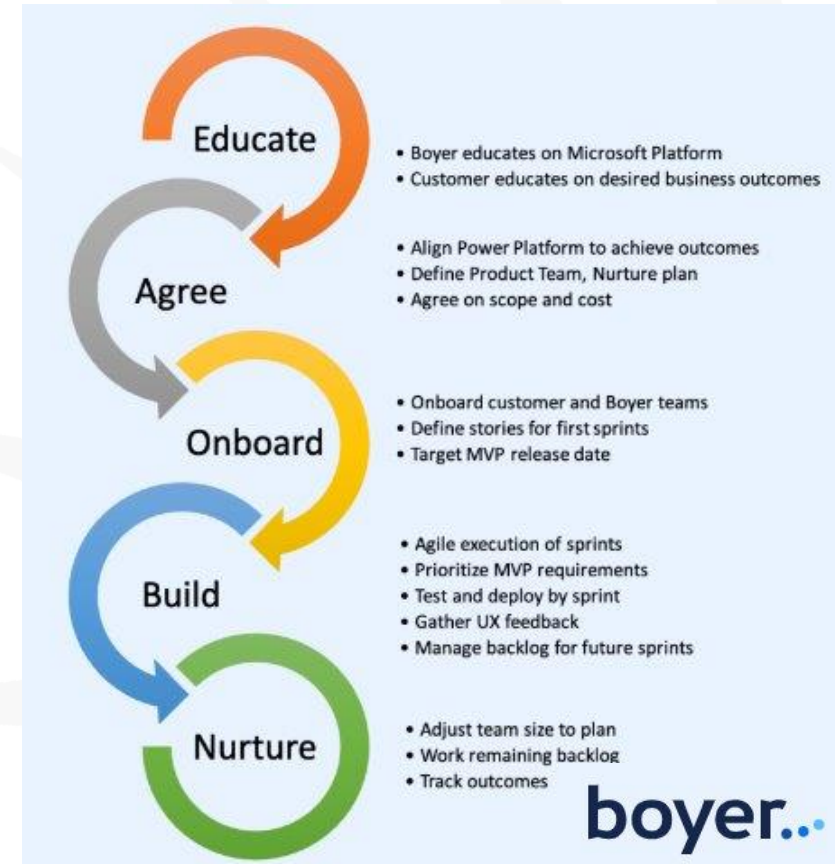
Evaluating Our Options



The Goldilocks Decision



Found our solution, now we needed to find a partner



Building Your Data System

Step-by-Step Guidelines to Stand Up Your Own Data System

Building Your Data System



Finish Your Search, Choose a Data System Vendor



Finish Your Search, Choose a Data System Vendor

During the search process, you may identify a number of solutions that fit your needs. Some of the platforms that we identified in this search included:

- Salesforce
- Microsoft Dynamics
- EmpowOR by CSST

What did we pick for our Centralized Data System?

Norwescap adopted the Microsoft Dynamics sales CRM platform, with assistance from a consulting service specializing in working with Non-Profit organizations.

This presentation is not an endorsement or implicit recommendation for or against any platform or any external vendor or consultant. Your unique agency needs will determine the best solution for you. The goal of this presentation is to demonstrate the process of adopting a Data System, not prescribe a solution to your agency.

Identify Stakeholders & Capacity:

Who you need to start building your Data System

Internal
Capacity

IT team

Internal Evaluators or Data team

Development team or Grant Writers

Agency Leadership and Program
Managers

Finance Team

Staff who will use the new Data
System

External
Capacity

IT Vendor or MSP

Data System Contractor

External Evaluator

Grant Writer

Partner Agency

Document Programs, Services & Outcomes: Before you can start building, know what you need

CAP Plan

Review and update your Community Action Plan.
Align programs with associated services, expected outcomes, and funding years.

Align your Services and Outcomes to a measurable KPI.
As a Community Action Agency, start with the CSBG SRV and FNPI inventory.

Identify when and how each service and outcome should be documented by staff.

KPIs

Identify deliverables to DCA listed in your Community Action Plan

Identify deliverables listed in other federal, state, or private grant awards

Identify metrics useful to your board, community at large, and other stakeholders

Document Programs, Services & Outcomes: Leverage the Smart Forms and DCA Documentation

Smart Form Employment SRVs

Employment Services (SRV 1)

Skills Training and Opportunities for Experience (SRV 1a-f)

SRV 1a Vocational Training

SRV 1b On-the-Job and other Work Experience

SRV 1c Youth Summer Work Placements

SRV 1d Apprenticeship/Internship

SRV 1e Self-Employment Skills Training

SRV 1f Job Readiness Training

Smart Form Employment NPIs

Employment (FNPI 1)

FNPI 1a The number of unemployed youth who obtained employment to gain skills or income.

FNPI 1b The number of unemployed adults who obtained employment (up to a living wage).

FNPI 1c The number of unemployed adults who obtained and maintained employment for at least 90 days (up to a living wage).

FNPI 1d The number of unemployed adults who obtained and maintained employment for at least 180 days (up to a living wage).

FNPI 1e The number of unemployed adults who obtained employment (with a living wage or higher).

FNPI 1f The number of unemployed adults who obtained and maintained employment for at least 90 days (with a living wage or higher).

FNPI 1g The number of unemployed adults who obtained and maintained employment for at least 180 days (with a living wage or higher).

Document Programs, Services & Outcomes: Example Documentation Hierarchy

Agency
Focus
Area

Program 1

Services

SRV

Outcomes

FNPI & CNPI

Program 2

Services

SRV

Outcomes

FNPI & CNPI

Prepare and Import Data: Collect Your Records and Prepare to Import

Starting a New System

Create two tables of the unique households and participants that you have served across all your programs, with required demographic data.

Consult your Smart Forms for the data you will need to track and allowable reporting options.

Try to digitize and deduplicate as many records as possible before importing data to your new system

Moving From an Old System

Export the data available from your existing data systems, and transform into two tables of unique households and participants

Consult your Smart Forms for the data you will need to track and allowable reporting options; confirm data was collected according to this standard

Be prepared to deduplicate, consolidate, or rectify conflicting data from different systems

Prepare and Import Data: Collect Your Records and Prepare to Import

Starting a
New System
or

Create one table of the KPIs that you intend to track and report on.

Moving From
an Old System

Create one table of the Focus Area, Program, Service and Outcome.

Map these Services and Outcomes to their KPIs

Determine the units used in reporting:
Services, Dollars, Weight, Duration, etc.

Prepare and Import Data: Collect Your Records and Prepare to Import

You Should
Now Have

Two Data Tables of Households and Participants and Two Lookup Tables or Programs and KPIs to bring to your CRM Platform for import.

Optionally, Two Data Tables of Services and Outcomes to bring to your CRM Platform for import.

A list of your agency's reporting obligations to your funder(s).

Prepare and Import Data:

Import Your Data, Prepare to Add New Data

Import
Your
Good
Data

Import client data tables.

Optionally import historic service and outcome data tables.

Plan report templates and data visualizations.

Prepare
to Add
New
Data

Plan how, when, and who is responsible for each record documented.

Plan how many users in each team need to access the new Data System. Who is adding data and who is viewing data?

Consider ongoing data imports to reduce duplicated effort.

Launch the Data System: Finish Building, Prepare for Launch

When Does
Building
Stop?

Creating new and editing
existing records.

Importing best available
data with acceptable data
loss.

Exporting, dashboarding, or
other reporting capability.

When to
Launch?

Plan your build and launch
around your reporting
calendars and funding years.

Start with a pilot team or
early adopters.

Phase in new teams and
users as necessary.

Summary of Our Experiences Building a Data System

Lessons Learned

Be strategic with system selection.

Leverage existing documentation and reporting requirements.

Start with strong documentation before import.
Measure Twice, Cut Once

Don't delay your launch because you're chasing perfection, go when the system is *Good Enough* to use.

Professional Development

Training staff to adopt a new data system and culture

Key Objective: Learn the Click Throughs



Test Group Learnings



Simple Language



Resource Library

Culture Change: Agency

Data Driven Culture: an organizational environment where data is valued, used, and integrated into the company's operations, mindset, and identity

Data-Exploring

- Some interest in understanding potential in using data
- Lack of internal know-how and capabilities
- Data sources unknown/uncontrolled
- Strategy and use cases not defined
- Staff considered data authors

Data-Informed

- Uses data to post-evaluate decisions
- Limited internal know-how and capabilities
- Data sources known but maybe not controlled
- Strategy somewhat informed by data
- Staff have interest in learning how data is used

Data-Driven

- Decisions driven by measurable experiments
- Quality internal know-how and capabilities
- Data from clear sources embedded into operations
- Outcome oriented goals
- Staff transitioning from data authors to data consumers

Data-Transformed

- Decisions driven by measurable experiments
- Advanced internal know-how and capabilities
- Predictable KPIs are well informed when set and hit regularly
- Clear relationship between KPIs and Strategic Plans
- Staff are considered data consumers

Culture Change: Staff

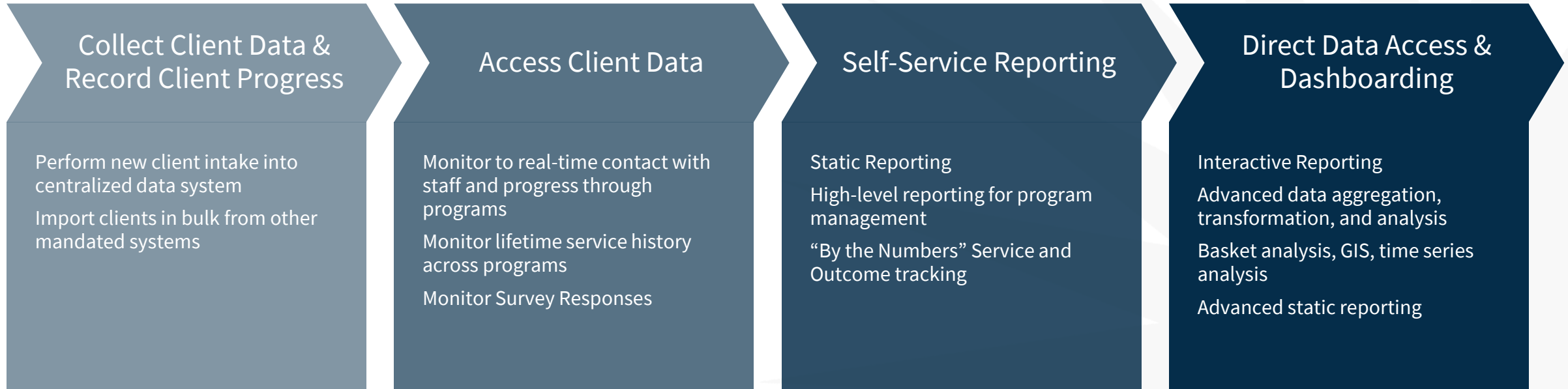
- War against what is “Required” and what is “Excess”
 - Understand Limitations
 - Make Concessions
 - In the Loop
- Pruning Bad Behaviors
 - Timeliness
 - Completeness



Implementing Your Data System

Leveraging your Data System to Generate Meaningful Reports for Funders and Agency Leadership

Implementing Your Data System





Date

1/1/2024

8/31/2024

Service Geography

All

Program

All

Participants Directly Served

3062

Unique Participants

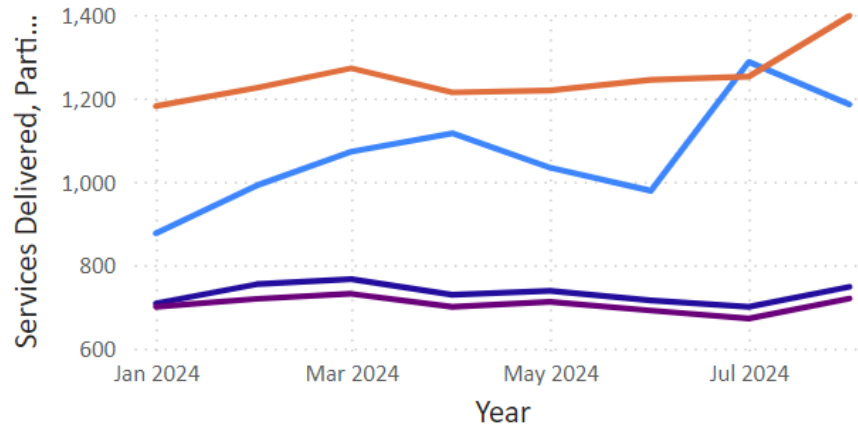
Households Served

2960

Unique Households

Service Delivery Over Time

Service Delivery and Participant and Household Reach, by Month



Program Reach By Norwescap Domain

Participants and Households Reached by Program Domain

Domain	Unique Participants	Unique Households
Assessment Programs	427	425
Children & Family Service Programs	197	177
Employment Programs	503	455
Energy Assistance Programs	1062	1058
Financial Empowerment Programs	283	273
Health & Nutrition Programs	438	437
Housing Programs	13	13
Senior Health Programs	423	416
Total	3062	2960

Participants Directly Served by Service Area



Service Delivery Summary

Service Delivery by Program and Service Item, with Proportion of Service Delivery and Reach

Program	Services Delivered	Participants Directly Served	Participants Indirectly Served	Households Served	% Services Delivered	% Participants Directly Served	% Participants Indirectly Served	% Households Served
Healthy Bones	1869	362	363	356	21.89%	11.82%	6.46%	1
Pathways 2 Prosperity	1491	172	334	127	17.46%	5.62%	5.94%	1
Energy Assistance	1119	1061	2122	1057	13.10%	34.65%	37.76%	3
Career & Life Transitions Center	861	287	512	284	10.08%	9.37%	9.11%	1
Healthy Families- TIP	573	45	146	41	6.71%	1.47%	2.60%	1
Family Self Sufficiency	436	87	197	81	5.11%	2.84%	3.51%	1
Engagement Partners - AmeriCorps	348	346	808	344	4.08%	11.30%	14.38%	1
Family Success Center	263	126	351	116	3.08%	4.11%	6.25%	1
SNAP	251	189	301	188	2.94%	6.17%	5.36%	1
Financial Empowerment Center	241	130	284	129	2.82%	4.25%	5.05%	1
Total	8539	3062	5620	2960	100.00%	100.00%	100.00%	10

About This Tab

This tab represents the participants and households who have been served by Norwescap Programs. Total service units are documented alongside direct and indirect participant reach, per household.

Current and Future Plans

Next Steps

Current

- Evaluation of 1st Full Year
- Training and Optimization

Future

- Trended Data: YoY, QoQ, and MoM
- Expand Automation
 - Survey and Data Collection Capacity
 - Expand Data Imports
- Share Our Experience & Support

Today's Presenters

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Evaluations & Research Manager



Thank you for joining us today!

Please take a couple of minutes to complete the Webinar Evaluation:



<https://www.surveymonkey.com/r/PeerData2Landscape>

A recording of the webinar and copy of the slides will be posted to the NCAP Resource Library in the next couple of days:

<https://communityactionpartnership.com/search-categories/>



Peer Data Webinar Series

REGISTER NOW!



Centering Customer Voice in Your Agency's Data Practices
October 2 at 2 pm ET

Navigating the Landscape of Technology & Data Systems
November 6 at 2 pm ET

A Web of Management Systems:
What if Your Spreadsheets Talked to Each Other?
December 3 at 2 pm ET



SCAN TO LEARN MORE

CSBG ORGANIZATIONAL STANDARDS SKILL BUILDER TRAINING

November 14 - 15 2024
Nashville, TN

The Organizational Standards Skill Builder empowers Community Action Agencies to meet CSBG Organizational Standards by offering knowledge and resources for implementing core practices, helping to establish a solid foundation beyond mere compliance.



**Learn More &
Register Now:**





NCAP's 2024 New Executive Director's Institute

Get ready to supercharge your leadership skills!

EAST COAST SESSION:

Alexandria, VA | October 29 – 30

WEST COAST SESSION:

San Diego, CA | December 3 – 4



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