



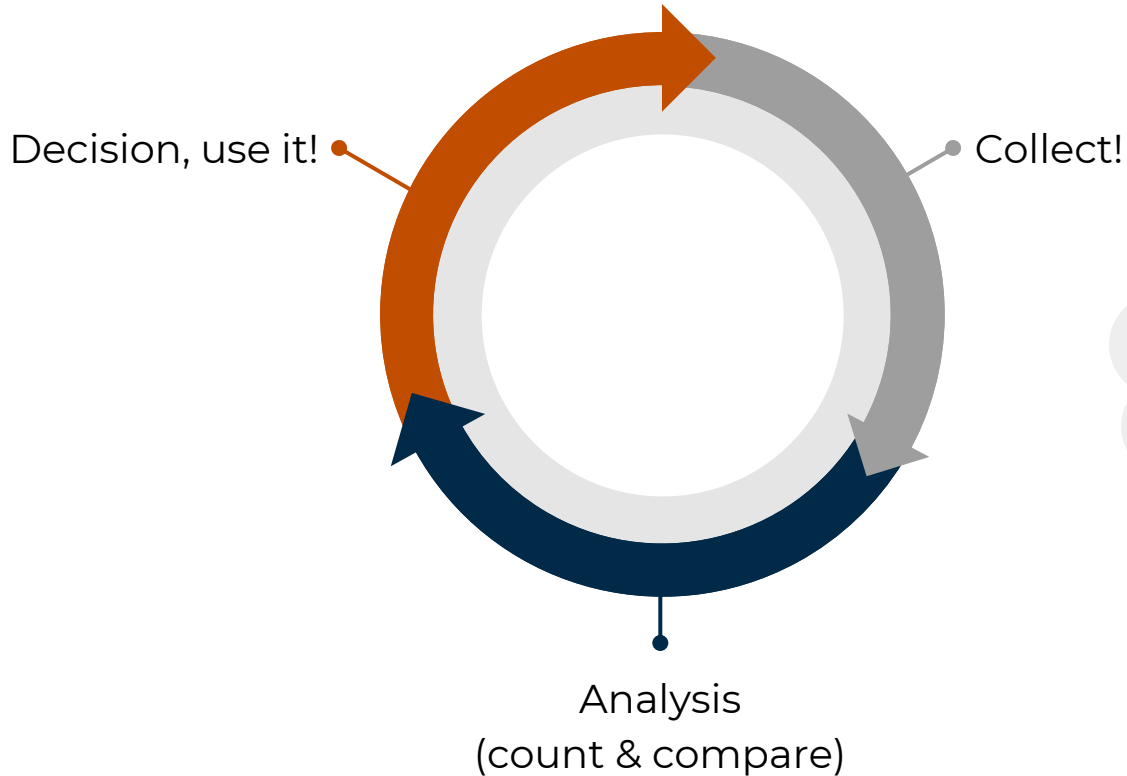
Funder Reporting is Only the Beginning:

Using Data to Plan, Build, and Support Your Agency's Future

NCAP 2025



Your **CAA** collects a lot of data...



...let's use it!

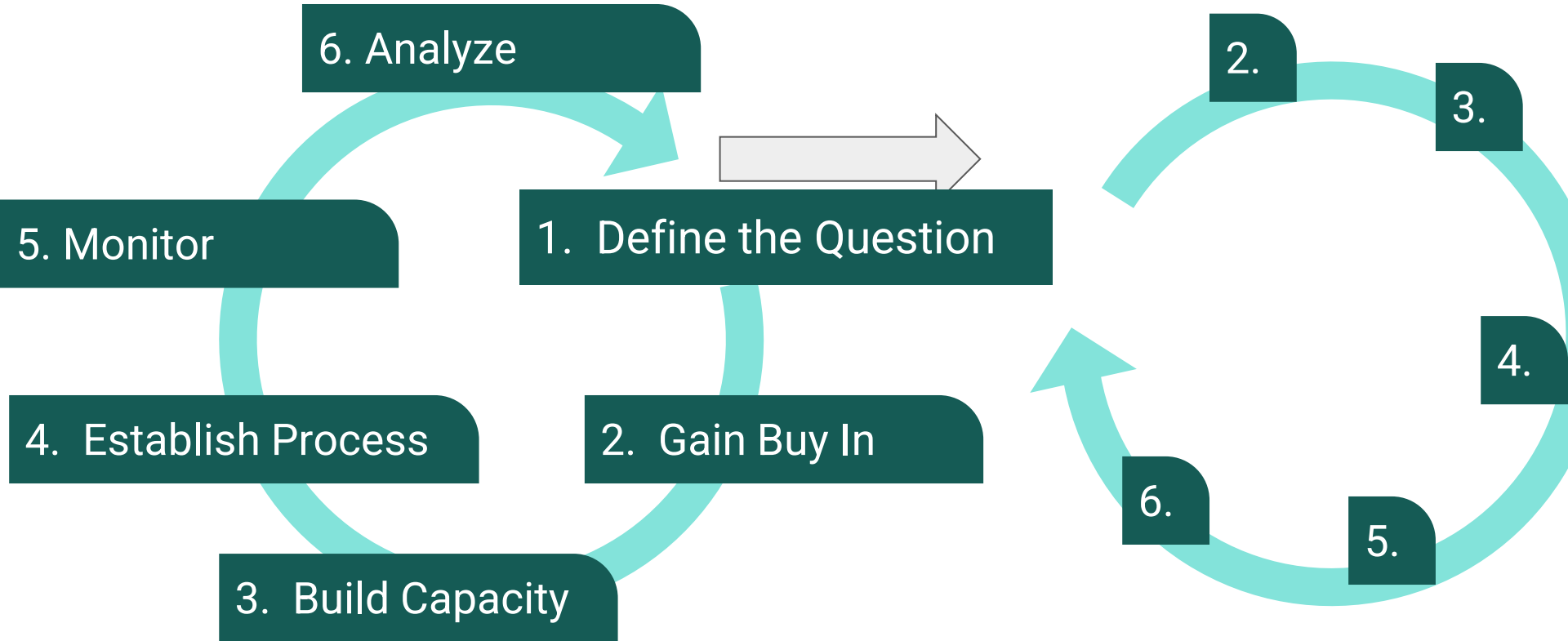


Influencing Data Capacity



- Identify purpose/use, audience
- Explicitly identify high level metrics that you will monitor
- Get clear about key data (usually geographic or demographic) for “slicing”
- Inventory your systems
- Rationalize data collection and storage processes
- Identify assumptions being made about data and information
- Tell success stories of using data to make changes in operations or help people
- Identify and support data stewards in your organization
- Create specific times that specific groups will review data

Process for Implementing Practices



USE IT



Collect & Monitor

Analyze & Discuss

Take Action

Defined processes and
Specific Data for Collection
Monitor quality

Count
Compare
Consider

Collect It: Pro Tip

Treat data and its collection as an asset

- Invest in it; plan and train for coordinated, integrated collection
- Embed collection and monitoring into normal operations

Have a cross functional group responsible for data governance

Define the “Source of Truth” for specific data and then use that!

Analyze It!

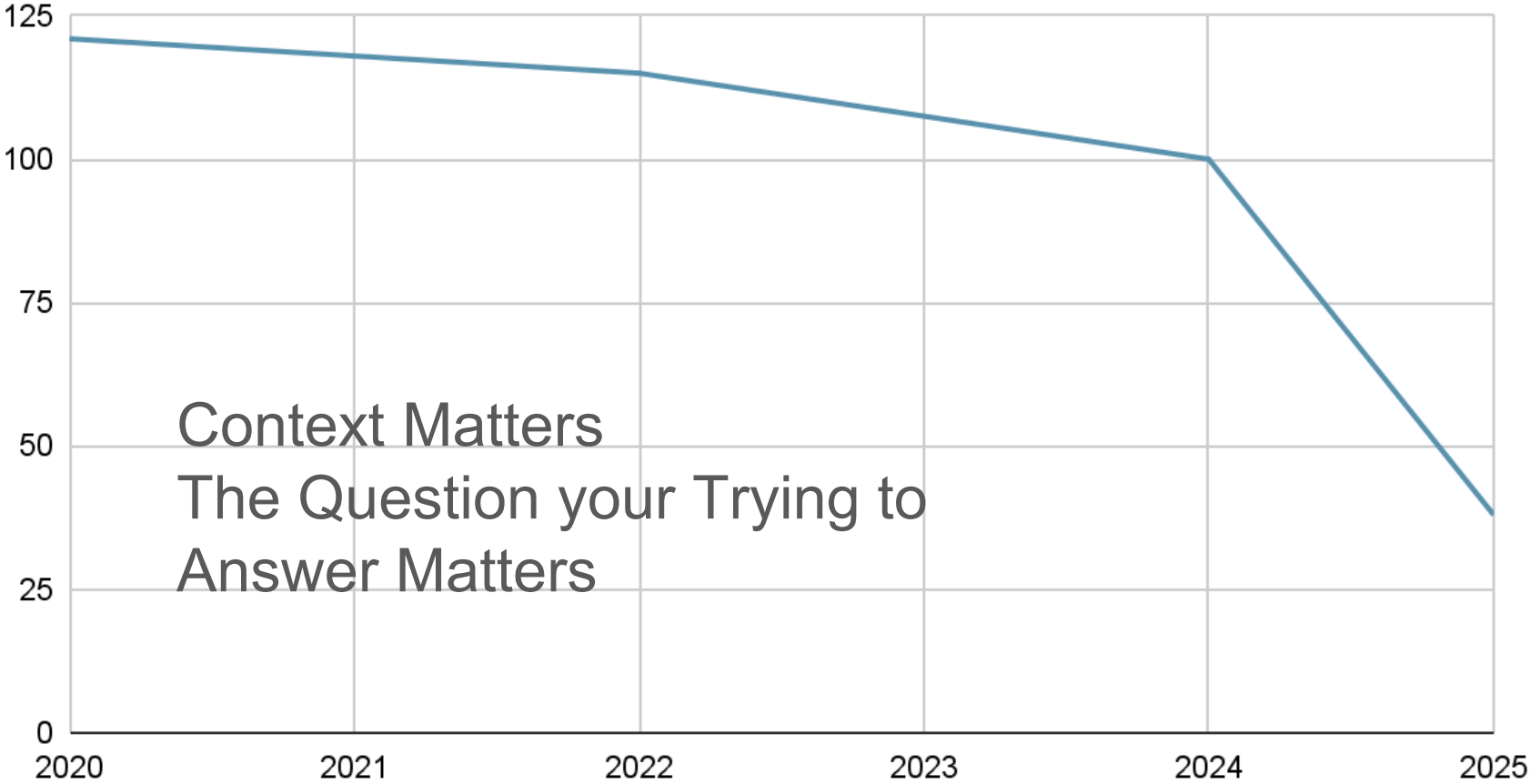
Start with data that you
have



Getting Started with the Data you Have

- Define a data set
 - E.g. all the households who have received a service from any program in the past 12 months; information you have about that group. Get it into a flat table
- Use different visualizations to try to summarize that data set -- things you can
 - count
 - compare
 - often overtime or sliced by critical demographic factors
- Discuss with those that collect and those that supervise--what you see and try to understand

Number of Families Kids Under 5 Served in Housing Programs



Context Matters
The Question your Trying to
Answer Matters

USE IT!



Use It! (examples)

Categories of use	Primary WHO	Purpose	Looking for....
Planning/Needs Assessment	Staff and Board	Make strategic decisions about where to expend resources	Data over time --Trends Community characteristics Stakeholder input on needs and agency skills Client characteristics
On going Strategic / CQI	Management and Leadership	Try new operational strategies or organization Invest in new skills or seek new grant types/support	Services Outcomes Other client progress and/or needs Financial and staffing position
Operational / Management	Managers and Frontline Staff	Monitor how much is happening, and how well it is happening; In order to manage staff, workloads and funder reporting	Services by staff Performance against promised funder items Timeliness and Responsiveness(i.e. how long to process x) Satisfaction feedback
Communication/ PR	Community, Partners, Funders, Donors	Build financial support/investment & understanding of agency's value	Successes and unique contributions
Outcome / Evaluative	Staff, Leadership, Customers, Board, Supporters	Understand what is working and what isn't, and sometimes why	Comparisons over time between groups, between service interventions

NEMSCA

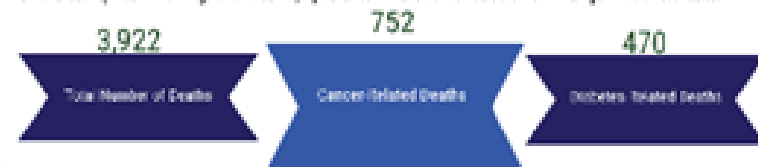
*Gain a better
understanding of the
communities we
serve using Social
Determinants of
Health Framework*

SOCIAL
DETERMINANTS OF
HEALTH

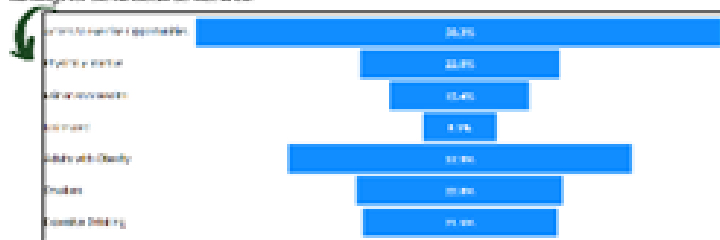
2023



With a lack of specialty medical providers within the service area being identified as a Top Five need in the NEMCSA 2022 Community Needs Assessment, the availability of, and access to, medical care helps to paint the picture of the health of the community. Challenges are care, prevention services, insurance status, specialty care, distance to a provider, and the quality of care given all influence the health of a community. Information shared on this page comes from the County Health Rankings and Roadmap published in 2023 as well as data from Michigan Health Statistics.



The chart below shows health indicators from the University of Wisconsin's Population Health Institute, County Health Rankings for the NEMCSA Service Area.



Average Teen Birth Rate: 23.75 per 1,000 15-19 year old females

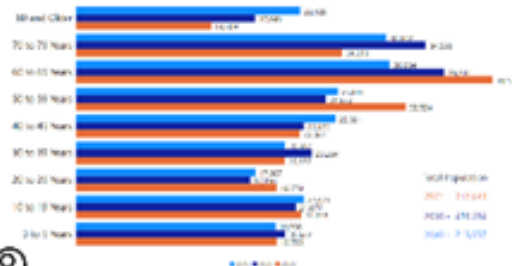
The data below shows the total number of providers within the NEMCSA Service Area. These numbers provide a background for the lack of specialty medical providers being identified as a top five need within the NEMCSA 2022 Community Needs Assessment.



Demographics are the data that show a wide variety of factors within a community or specific group/population. They can be used to identify needs and gaps and make certain generalizations about groups. Some of the most common demographics include age, sex, income level, race, employment, location, homeownership, and level of education - all of which are shared at various points within this report.



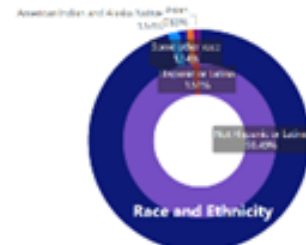
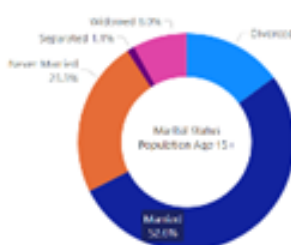
NEMCSA 12-County Population Projections 2021 - 2040



In 2021, the largest age group for the NEMCSA 12-county area is age 60-69. That age group projects to be the largest in 2030 and 2040 as well. The 80 and older age group is projected to have the largest growth by 2040, gaining over 8,800 individuals.



The NEMCSA Service Area covers approximately 6,200 square miles in beautiful Northeast Michigan. The Service Area boasts the Huron National Forest, AuSable River, strong farming communities and 1,850 miles of shoreline. In addition, six counties border Lake Huron, earning the nickname the Sckawee Side.



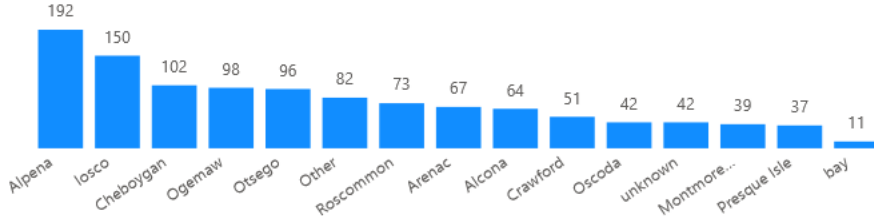
Within the Service Area, of those age 15+, 52.6% of the population was married while 23.3% have never been married.

White (84.7%) was the largest race/ethnicity. Black or African American was 1.1% and Native Hawaiian and Other Pacific Islander was .55% of the population.

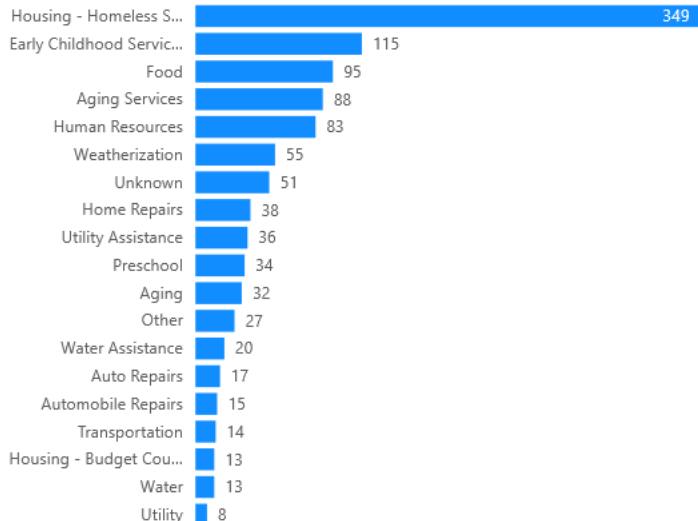
Determining Needs Via Web Chat Data

1218

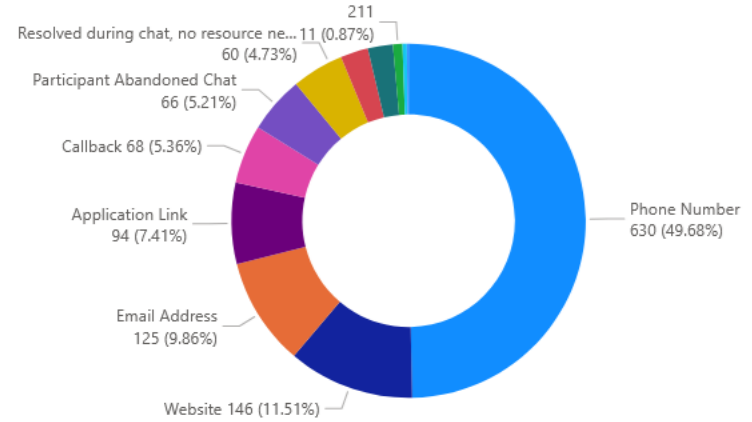
Total Chats



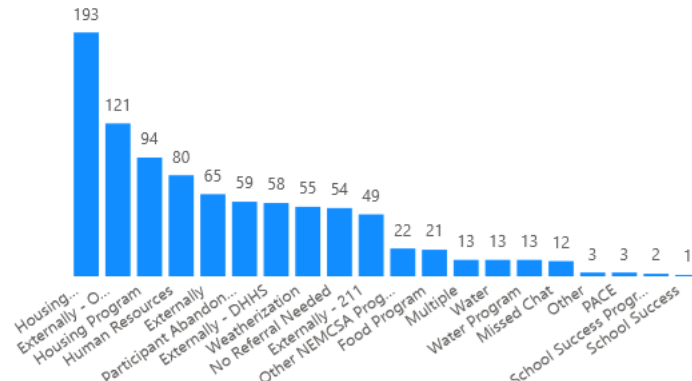
Top 20 Concerns



Resources provided as percentage of all resources



Top 20 Referrals



County

All

Date

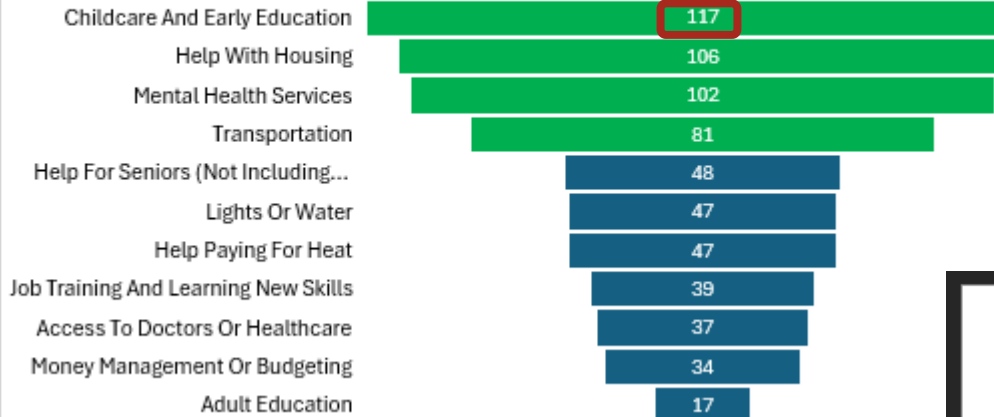
5/1/2024

8/27/2025



Strategic Planning

What are the top areas NEMCSA should focus on for the next 3-5 years?

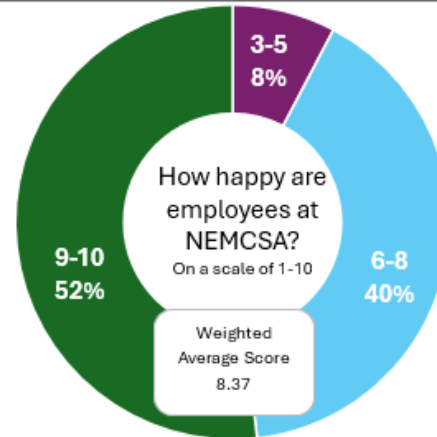


How important are these things for NEMCSA to do?	Weighted Avg (4 Point Scale)
Help people in poverty meet their basic needs	3.8
Help people become more independent	3.8
Help people avoid falling into poverty	3.6
Respond to what the community needs right now	3.6
Get the community involved (volunteers, donations, partnerships)	3.5
Working with other groups in the community	3.2

Very Important = 4, Important = 3, Somewhat Important = 2, Not Important = 1

Division	# of Responses
----------	----------------

Agency Support	21
Aging	44
Community Programs	26
Early Childhood Services	117
Grand Total	208

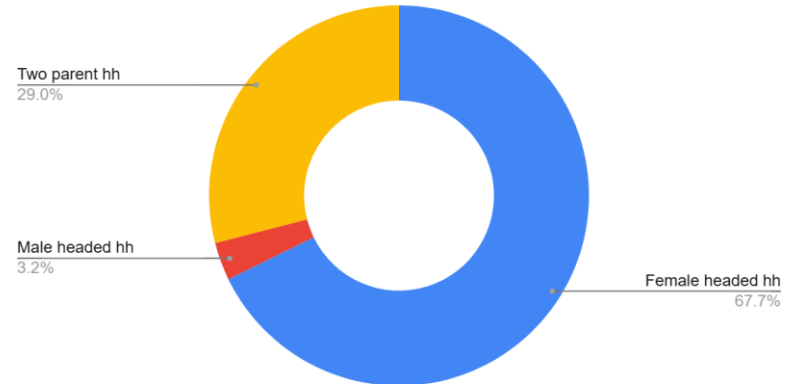


Innovative state sponsored whole family program that 6 agencies in VA are implementing.

Intervention is heavily focused on coaching with wrap around services

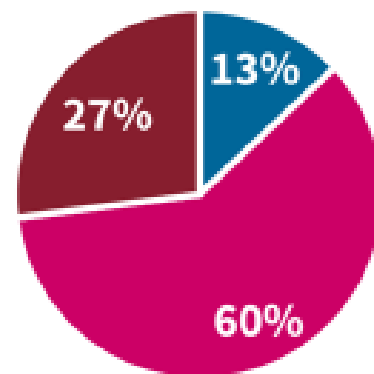


Family Type Receiving Whole Family Coaching
n=176



Change in Earned Income

Households



- Decrease in Earned Income
- Increase in Earned Income
- No Change in Earned Income

3 out of 5 Families
saw an increase in
their percent of
poverty



Measuring Work Beyond Funder Requirements

Quantity

Quality

Effort

How much did we do?

- 801 state and federal returns filed
- 402 federal and 399 state returns
- 280 households received CASH Coaching with referral and follow up
- 392 household received CASH Coaching and heard about services

How well did we do it?

- 2.17% rejection rate of returns ranking us second in the country.
- 63.8% of filers received additional support beyond tax season, which is about average in Maine.
- We received a 100% in client satisfaction on our survey.
- 49.4% of filers qualified for the Earned Income Tax Credit making our site the highest percentage of EITC filers in the state.

Effect

Is anyone better off? (# and %)

- We are still waiting on some of our results, but so far, we know the following:
- 332 households (82.6%) received a refund boosting their income and resulting in \$970,737 total back to our local economy.
- 97 households were invited to participate in financial coaching as a result of their CASH Coaching (still waiting to see how many sign up).
- 100% of people saved on tax preparation fees: \$61,104 saved (on average \$152/household) in tax preparation fees
- 280 households (69.7%) were encouraged to participate in the FDA matched savings program, 4 (1%) of which are in the process of signing up. We are waiting to see if others do, however, we historically struggle to get people to sign up for services beyond the day that they file.

Measuring Work Beyond Funder Requirements

Program

A16

HARP

DHHS

Head of Household

Q Search

Kay Gentry

Lupe Horne

2/21/2023

Earliest Date

97

Total Households

378

Longest Wait - Days

Number	Program	Date Added	Staff
3	A16	2/21/2023	Julio Chandler
3	HARP	2/21/2023	Rolande Riggs
5	HARP	2/21/2023	Wade Duke
3	A16	8/21/2023	Julio Chandler
3	HARP	1/21/2023	Julio Chandler
3	A16	11/20/2023	Wade Duke
5	A16	11/20/2023	Rolando Riggs
4	DHHS	12/21/2023	Julio Chandler
5	A16	12/15/2023	Wade Duke
5	DHHS	12/12/2023	Julio Chandler
6	A16	11/28/2023	Wade Duke
7	DHHS	11/26/2023	Wade Duke
8	A16	12/21/2023	Julio Chandler
8	A16	12/25/2023	Wade Duke
9	A16	12/25/2023	Wade Duke
9	A16	11/26/2023	Wade Duke
10	DHHS	12/24/2023	Julio Chandler
13	A16	12/26/2023	Wade Duke
18	DHHS	12/26/2023	Wade Duke

Program Totals

A16	84	6/21/2023
HARP	7	7/21/2023
DHHS	6	12/1/2023

Waitlist Data for
Whole Family
Coaching

Measuring Work Beyond Funder Requirements

	HoH	Coaching Session 1	Coaching Session 3	Coaching Session 5	Energy Kit Delivery	Financial Literacy Work-
C		✗	✓	✗	✓	✓
H		✓	✓	✗	✓	✗
I		✓	✓	✓	✗	✗
J	ell	✗	✗	✓	✗	✓
K		✓	✓	✗	✗	✓
L		✓	✗	✗	✓	✗
J		✗	✓	✓	✓	✓
C		✓	✓	✗	✗	✓
K		✓	✓	✗	✓	✓
N		✗	✓	✓	✗	✓
		✓	✓	✗	✓	✓

Accountability!
Tracking that employees are following the expectations set

Summary Points



- ✓ Using data leads to better data collection
 - Good data collection allows for accurate analysis
- ✓ Using data requires some analysis...
 - In the process of analysis comes the “**story**” about meaning
- ✓ Analysis can be as simple as **counting, comparing,** and **asking questions**
- ✓ Visualizations can help with analysis
 - Summarize data sets
- ✓ Not every visualization will be interesting
- ✓ **Big Questions / Theory change / Strategic plan** - can help guide you to look at particular data