

Peer Data Webinar Series: Automating What Matters October 28, 2025



National Community Action Partnership
1020 19th Street NW, Suite 700
Washington, DC 20036

www.communityactionpartnership.com

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.



AUTOMATING WHAT MATTERS

Sadeeqe Mohamed

Meet MARIA

- Family Services Worker
- Re-enters data into 3 systems
- Spends hours emailing contractors
- Downloads reports for compliance

Impact : Less time with families



WHY AUTOMATE?



Who Wins? Executive Directors , Data Teams , Compliance , Program Staff

Pain

WITHOUT AUTOMATION

When we don't automate, we get stuck in loops



INTAKE



DATA ENTRY



REPORTING

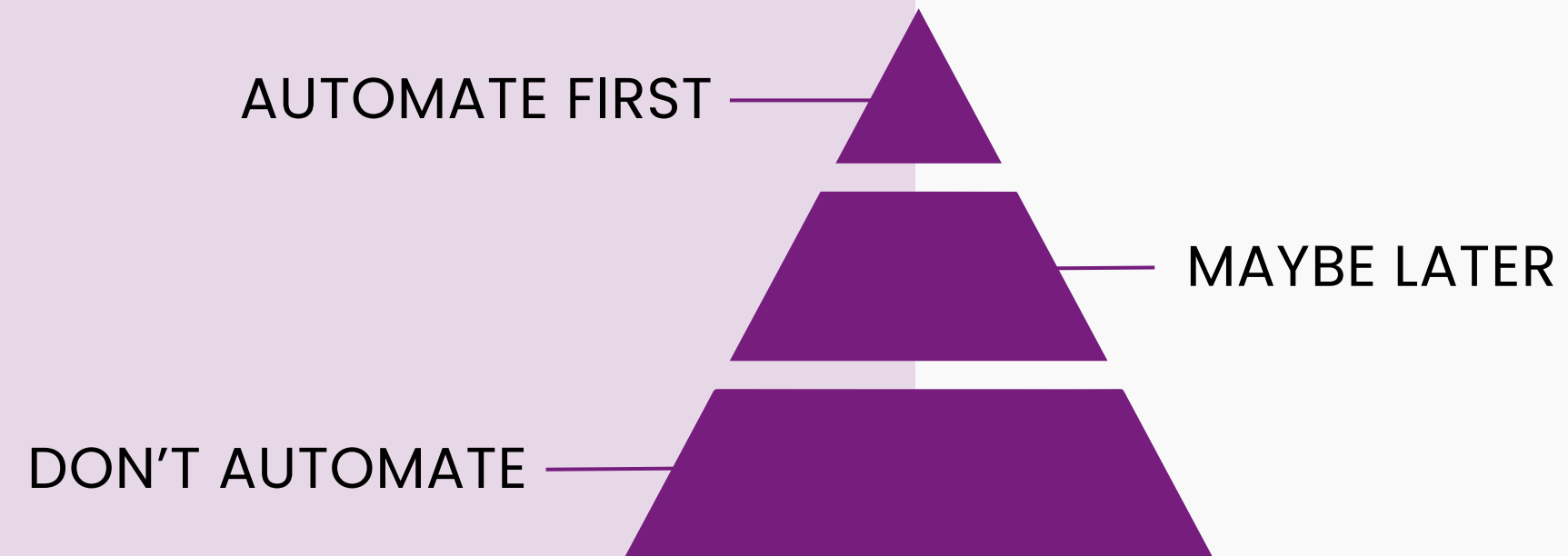


REPEAT



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What TO AUTOMATE FIRST

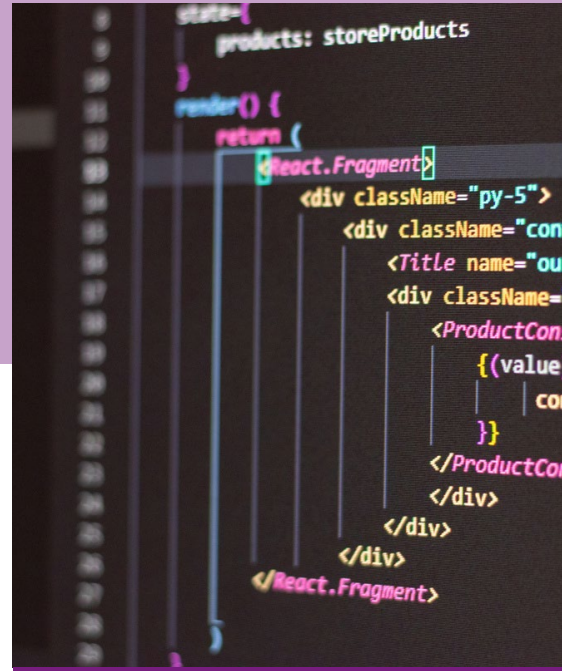




Point & Click



RPA



Scripts



Apps Scripts



APIs



AI Agents

Automation Spectrum

Start where you are & with the tools your staff can use



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AUTOMATION RECIPE



1

Map the process &
Define the Goal

3

Choose the Tool

2

Identify the Trigger

4

Measure the impact



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WEATHERIZATION CASE STUDY



BEFORE

- Each contractor tracked in separate Google Sheets. Status updates by email lead to delays and lost info.

Impact : Families get homes repaired faster

AFTER

- AFTER: Point & Click Automation (Power Automate/Tray.io). Central SharePoint list for all contractors. Auto-notifications and file sharing eliminate status emails

DASHBOARDS

BEFORE

- Staff manually download reports
- Dashboards stale by the time they're refreshed

AFTER

- Power BI connected to live sources
- Real-time insights for leadership



LESSONS LEARNED

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Not every
automation
worked → but
each one taught
us

Build
Automations
with Scaling up
in mind

Failures =
building blocks
for future
success

Start Small → Scale Later

Automation

**IS NOT ABOUT TECHNOLOGY.
IT'S ABOUT MISSION.**

AUTOMATION STARTER CHECKLIST



1

Map the process

3

Spot repetitive
steps

5

Start small →
scale later

7

Build error
handling

2

Define the goal

4

Choose the right
tool

6

Test & refine



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Automation

ISN'T ABOUT TECHNOLOGY

More time for families

Fewer staff burned out

Stronger outcomes for communities





WHAT'S ONE PROCESS YOU'LL COMMIT TO EXPLORING AUTOMATION FOR WHEN YOU GO BACK?

Sadeeqe Mohamed
Director of Data Strategy



Wayne Metro Data Strategy

Vision: To build a unified and trusted data culture that empowers informed decisions and demonstrates community impact.

Focus Areas:

- **Governance & Quality** – Strengthen data accuracy and accountability.
- **Integration** – Align data across programs for a complete view of service impact.
- **Literacy** – Build staff capacity and confidence using data.
- **Insights** – Turn data into clear, actionable information.
- **Automation** – Streamline processes and reduce manual work.

Goal: Use data to drive efficiency, equity, and measurable results for Wayne County residents.

Please Share Your Feedback!

The Peer Data webinar series will continue in 2026!

Share your feedback about today's session and submit suggestions for future webinars here:

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

