Small charity data journeys

November 2023

Superhighways
Think Social Tech

Small Charity Data Journeys

Swamps, bridges and moving forward with data in small charities and community organisations.

[Superhighways]
[Think Social Tech]

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Executive summary

Overview

From September 2021 to May 2023 Superhighways and Think Social Tech set out to answer the question 'how might we better support small charities and community organisations to move forwards with data?' We undertook qualitative research with 36 small charities and community organisations to understand when key challenges emerge and where additional support or collective intervention could help. This report outlines and presents a visual map of a typical data journey experienced by small charities and community organisations, highlighting

- **Pathways:** Distinct entry points and goals for moving forwards with data
- **Swamps:** The key challenges and areas of data work where they get stuck
- **Bridges**: Key factors which help to avoid or move on from swamps, making the journey easier

It intends to support all those involved within and around small charities and community organisations, directly and indirectly, to reflect on their role in their data journeys and how they might help. It also includes a set of stories to showcase how data is helping to shape and improve local services, advocate for policy change, give voice to specific marginalised communities and access funding to respond to emerging needs locally.

Key learning about data journeys for small charities and community organisations

1. Capacity is a key barrier, particularly for very small groups
2. Data journeys often involve one step forward and two steps back
3. Funders and funding affects data journeys. For better and for worse
4. Data journeys need time, but this can be better spent
5. Data is about numbers and stories. It needs to be used responsibly and equitably

Pathways, swamps and bridges

Goal: Collect better data

- **Swamp: Deciding what to collect.** It was hard to know where to start. There was a lot to learn about different data collection approaches. Few fully planned their data collection and analysis framework upfront. It was common to collect too much or regret what questions were asked (or not).
- **Swamp: Logistics and policies.** Data collection often required new devices, hardware and additional office space or time at a desk. Policies needed to be in place for data protection, safeguarding and security. It took time to weigh up how to collect data in sensitive and appropriate ways to strengthen relationships.
- **Swamp: Choosing tools.** Choosing tools was tricky with a limited budget. Whilst free tools were invaluable, they often come with some limitations. Learning how to use them and understanding limitations took time.
- **Bridges:** Capacity (time for data work, budget, accessing free tools) and learning about data.

Goal: Make sense of data

- **Swamp: Data analysis.** Most relied on spreadsheets and needed to use advanced functions such as formulas and pivot tables for analysis. Few had tools or skills to work with qualitative data and many struggled to find or work with secondary and sector data. Web based data and using AI look to be skills gaps.
- **Swamp: CRM: Stick or twist?** Analysing data often highlighted the potential need for a new CRM. Spreadsheets became unwieldy, or current CRMs had poor reporting functionality. This was a difficult and potentially costly decision. Many got stuck understanding internal needs and what options would work best.
- **Bridges:** Analysis skills, a CRM that meets their needs and resources or funding.

Goal: Act on insights

- **Swamp: A data culture.** The person leading on data needed to get everyone on board, by upskilling teams, ironing out data collection problems and demonstrating how data is used.
- **Swamp: A strategic view:** Overall, Board members and CEO's needed a clear vision about their ambitions for data and how they would invest in this. They may need to upskill themselves and bring others on this journey.
- **Swamp: Using data to improve.** It took concerted effort to transition from solely reporting on data, to presenting this in a way that would highlight trends and opportunities to change and improve.
- **Bridges:** A dedicated data role and a data savvy CEO / Board were vital to moving forwards.

Goal: Influence change

- **Swamp: Publish and share.** This needed confidence in what to say and how, editing and design skills. Further efforts or skills were also needed to share and promote this externally, both online and in person.
- **Swamp: Collective approach.** A handful of organisations were sharing their data or systems, in order to strengthen their delivery, influencing work or benefit the sector. A significant investment of resources, expertise and time was needed to create data sharing agreements, align processes and develop shared infrastructure.
- **Swamp: Influence policy.** Those hoping to achieve this needed confidence in their data to feed into relevant consultations. They drew on their experience of participating in local forums to shape their data collection.
- **Bridges:** Developing data expertise internally and collaboration / partnership helped navigate these swamps.

End points?

For many, data journeys were circular and iterative. It was common to revisit earlier decisions. The goal was to continue building confidence in their data collection, analysis, action or influencing work around this.

Building better bridges

Whilst many small charities and community organisations are able to access funding and support to help them on their data journey, they continue to encounter the same challenges. There is a clear need to build on current support and funding collectively, as well as individually, to meet key needs in the sector. The following calls to action are intended to help provoke reflection and action.

How might we...

1. Create capacity and headspace to plan data collection and analysis?
2. Better support equitable and responsible approaches to data collection?
3. Improve the use of spreadsheets, qualitative data and secondary data in the sector?
4. Improve decision making, use and ownership of CRMs in the sector?
5. Better design funding to support good data journeys?
6. Enable CEOs and board members to develop data literacy and approach data strategically?
7. Encourage small charities to prioritise sharing their data and insights?
8. Celebrate and share good data practice to inspire others?

Introduction

From September 2021 to May 2023 Superhighways and Think Social Tech set out to answer the question 'how might we better support small charities and community organisations to move forwards with data?'

Superhighways commissioned this project in order to clearly map, understand and communicate how small charities move forwards with data, when they get stuck and where support is best placed to help. Their Datawise London programme, alongside Trust for London funded work, offers training, guidance, advice and support to organisations based in London to better use data to meet the needs of Londoners. They regularly see small charities getting stuck, or needing to develop skills as they look to undertake valuable data work. Datawise London is funded under the Cornerstone Fund by City Bridge Foundation as part of a broader programme of systems change work which intends to:

- ✔ Better understand the opportunities, interactions & interventions that lead to increased data maturity in the small charity and community organisation sector
- ✔ Help funders, infrastructure and specialist organisations better understand how they can fund and support data capability programmes for the sector
- ✔ Shape the platforms, tools and learning resources developed by Datawise London 2022-25

This project also responds to growing ambitions amongst small charities and community organisations to use data. The 2023 Charity Digital Skills Report tells us that 52% of small charities say their top priority this year is to use data insights effectively to improve services or operations. Yet they also face a range of barriers. For example, half of small charities say their Customer Relationship Management System (CRM) or database is causing a significant challenge for their organisation. Over a third (38%) rate their skills as 'poor' when it comes to using data to inform strategy and decision making. Furthermore, the Data Orchard State of the Sector 2023 report found that 58% of organisations say their staff are not data literate. They also report that there is no relationship between charity size (income or number of employees) and data maturity. We already know what data maturity (or a successful data journey) looks like, from the Data Orchard Data Maturity Assessment and the associated Data Maturity Framework. This outlines the key stages of data maturity and gives a detailed breakdown of what poor, good and great progress looks like across seven key themes. In other words, we know small charities can move forwards with data, we just don't know enough about why some succeed and others struggle, or the extent to which challenges are shared.

This project set out to understand what makes small charity data journeys unique. We wanted to map where key challenges emerge and explore where direct support and collective intervention could help. Over the course of two years, we undertook qualitative research with 36 small charities and community organisations. This included a pilot roundtable in 2021, 15 in-depth one to one interviews in 2022, two journey mapping workshops and a report back session in 2022, followed by 6 case study interviews in 2023. These all focused on what success looks like, 'swamps' (where they get stuck) and 'bridges' (what helps them move forwards).

This report presents our findings. It is framed around a visual map of 10 common data 'swamps' on a charity data journey. It also showcases a set of stories to highlight how data can help small charities to improve their services, advocate for change, identify emerging needs locally, inform strategy and evidence the difference they make. Finally, it provides a set of 'how might we statements' as a call to action for all those involved in small charity data journeys to explore how we can collectively solve key challenges.

Our definitions

Charities (shorthand for charities and community organisations)

Throughout this report, we use the term ‘charities’ as shorthand for the range of non-profit, voluntary, community organisations, groups and charities who took part. This is not intended to refer solely to registered charities and encompasses organisations with a range of legal entities.

Small

We define charities and community organisations as small, where they have an annual income of under £1 million. However, two large organisations took part in the research, because their operating budget was under £1 million (they also employed less than 5 staff) whilst redistributing significant grant or partnership funding.

Data

The things we have - or want to have - that can tell us something about what we should do, where and with whom, as well as what we’ve done, how we could do things better and what change we’ve brought about (Data for Action - A shared definition of data)

Section 1

Mapping and visualising data journeys

1.1 A visual data journey map

At the heart of this project has been a desire to understand the key turning points, enablers and challenges small charities and community organisations experience on their data journey. Central to this has been a collaborative journey mapping method, outlined in Section 2: Our discovery research process and detailed in the Appendices.

Building on this ethos, we created our own visual map of a data journey for small charities and community organisations, shown in Figure 1. This map visualises the reality of what this journey is like and the goals at each stage. It highlights:

- Pathways: A goal and reason for focusing on data
- Swamps: Where organisations get stuck and struggle to move forwards
- Bridges: Enabling factors which makes the journey easier, by avoiding swamps or escaping them.

This visual also has two functions. Firstly, it presents a simplified version of a data maturity framework and complements the Data Orchard Data Maturity Framework. It also represents the reality of how small charities and community organisations experience their work with data, taking inspiration and learning from the Catalyst Charity Digital Journeys research and maps. Secondly, it highlights what obstacles lie ahead and what might help to move forwards for those on data journeys. This intends to encourage those involved with data journeys to reflect on their role and how else they might help.

This visual is used to frame this report, which outlines the value of a data journey (in Section 3: Data showcases), before detailing why and how small charities get stuck throughout their data journey (in Section 4: Pathways, swamps and bridges) and providing calls to action (see Section 5: Better bridges).

Figure 1: Visual data journey map for small charities and community organisations

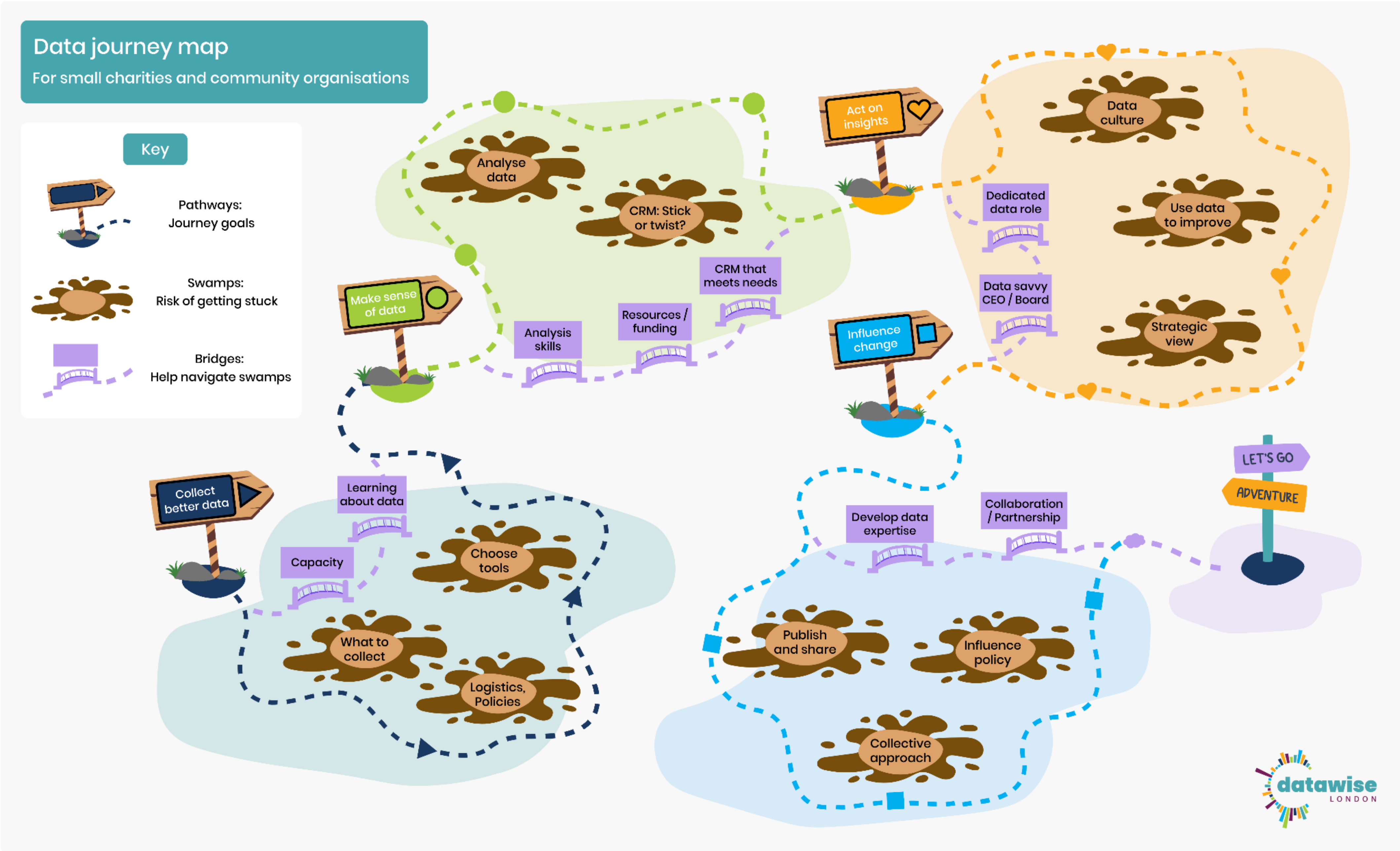


Table 1: Data journey map content summary

Pathway Entry point and goal for journey	**Swamps** Risk of getting stuck	**Bridges** Easier route, helps navigate swamps
Collect better data	→ What to collect → Logistics, Policies → Choose tools	→ Capacity → Learning about data
Make sense of data	→ Analyse data → CRM: Stick or twist?	→ Analysis skills → Resources / funding → CRM that meets needs
Act on insights	→ Data culture → Use data to improve → Strategic view	→ Dedicated data role → Data savvy CEO / Board
Influence change	→ Publish and share → Collective approach → Influence policy	→ Develop data expertise → Collaboration / Partnership

1.2 Key learning about small charity data journeys

Learning 1: Capacity is a key barrier, particularly for very small groups

Small charities are able to do great work with data, which we have highlighted through a range of stories (see Section 3). As Data Orchard reports, organisation size is not a predictor of data maturity. Those we spoke to explained how they faced specific capacity barriers to moving forwards:

- ➔ Limited budget generally and funding restricted to delivery, which does not include data costs or data work. Subscriptions and licences are often prohibitively expensive. Many are used to relying on free options.
- ➔ No office space or limited time at a desk for administrative tasks. Ongoing data work (such as cleaning and processing data) is often neglected until there is an urgent need for it, such as a funding application, funder report or trustee meeting. It is time consuming to retrospectively find and fix data. As a result, data collection and quality suffers, analysis is limited. Investing time regularly would help this.
- ➔ Few staff, who are overstretched and often have wide ranging roles, or volunteer led groups often result in limited time to focus on data. It took time to plan good data collection and dedication to learn new data skills.
- ➔ Lack of equipment, devices and data to access the internet. Many were unable to invest in the laptops, phones and devices to collect data. As a result, they relied on personal devices (if available) and paper forms.

> *"You know I still don't have an office 13 years later. I do everything from home or from my car. Things like that are frustrating. I'd like access to a centre more often, not just for the four hours that we've booked here and there to run sessions. Then I would do things very differently."*

Learning 2. Data journeys often involve one step forward and two steps back.

It is tempting to imagine that a data journey is linear. However, the reality is far messier. An investment in tools or a new data role can help significantly for example, but other factors will always help and hinder progress. As Data Orchard's State of the Sector 2023 report highlights, charities at all stages of digital maturity typically spend half of their staff time working with data (it doesn't decrease). The small charities we spoke to explained how they moved backwards, as well as forwards in terms of their skills and capacity. For example, a new CEO, trustee or data role would start at the organisation, key people would leave, new digital and data concerns would emerge (such as GDPR legislation or advances in Artificial Intelligence tools) or the context would change (such as the Covid-19 pandemic). Each of these could end up revisiting previous decisions. Those advancing with data often later realised they did not want to collect as much or needed simpler processes and systems. We also discovered small charities with very little data capacity successfully undertake advanced data projects. Overall, it is important to remember that milestones are never completed, just temporarily resolved and that data journeys are always ongoing.

> *"We are good at collecting data, but it is a struggle despite a CRM, because the CRM is not as flexible as we need it to be. It all comes back to our CRM. We need to make an actual decision to stick with it and overhaul it, which is a good amount of work. Or we say OK let's drop it, which emotionally is a bit of a step back because it was a lot of work. Excel works well enough and we may revert to it. Now that other systems have improved over the pandemic and everyone is more skilled up, is it time to change?"*

Learning 3. Funders and funding affects data journeys, for better and for worse.

Data journeys are often tied to funding. This can be a key driver for getting started, as discussed in our early insights blog post. Small charities started to collect data about their work, services and impact more purposefully when they recognised they needed this to apply for funding and / or when reporting to funders and commissioners. Some also noted that regular reporting to funders helped them focus on what their data was telling them and why. However, this was challenging if they had ineffective systems, paper-based processes and a lack of capacity generally. Lengthy funder reports and reporting to multiple funders compounded this. IVAR's survey of 1200 charities reports that 71% feel that grantmakers don't understand how much time and energy it takes to respond to all their different monitoring requirements. Their Better Reporting recommendations would help here.

We also found that funding could provide a key bridge and help small charities take important steps forward with data at each and every stage of the data journey. Many of those undertaking advanced data work reported having some level of core funding. Others found it particularly helpful to pay for or access free support, training and consultancy through their funding (or funder plus support). Most challenges however looked to arise when funding was solely tied to direct project delivery, without additional time for data work or a wind down period to make the most of data and share this effectively. Development, top up and legacy funding could prove incredibly helpful here.

> *"The way roles get funded are thought about purely in terms of delivery. And actually to set up data to monitor it and to analyse it properly takes a lot of time, and there's never enough time given to that. I feel like roles need to be funded with a day extra in mind, for data management, learning coordination, analysing data, because data is always the extra thing you have to do. You never have enough time to teach yourself or to set up properly."*

Learning 4. Data journeys need time, but this time can be better spent

Participants shared why it was important to spend time on data. This might be spent on entering data, organising it, reviewing how their system works, developing new skills, bringing everyone together around what to collect and why, undertaking analysis, training staff to use new tools or design new processes which meet everyone's needs. Yet many felt they were struggling unnecessarily and described their work with data as painful, isolating, worrying and difficult. They felt that if they had the right tools, skills, internal buy-in, inspiration and budget that their work would be easier and better. To this end, they valued additional training from Superhighways, funder support, learning from peers and expert advice.

Many charities also shared similar challenges. Some were spending hours creating reports for a whole array of funders. Others were spending significant sums of money to develop their CRM, only to later discover they aren't able to use it. Furthermore, the functionality they needed was similar to many other charities, who had similarly paid for the same development. There is value in funders, intermediaries, tech companies, large and small charities coming together to solve common problems shared by charities. To this end, we have proposed a range of 'how might we statements' for further exploration, in Section 5.

> *"We are still entering everything into the Excel spreadsheet once a month. It takes a long time. It's slowly getting us recording the right data better, analysing it in a useful way and showing it to funders. There must be a simpler way."*

Learning 5. Data is about numbers and stories. It needs to be used responsibly and equitably.

For many small charities, data is typically framed as being about social impact and the work they deliver. This is largely in line with the following definition:

> *The things we have - or want to have - that can tell us something about what we should do, where and with whom, as well as what we've done, how we could do things better and what change we've brought about (Data for Action - A shared definition of data).*

Data is typically framed as being synonymous with numbers. Collecting data, particularly in the early stages of their data journey, was often a means to an end. For example, it helped when writing a report to funders and commissioners to provide evidence about the difference they make, or identifying the need for a new service. Many of those we spoke to highlighted the power of numbers, which often carried more weight as 'evidence' for funders, commissioners and policy makers.

However, for some small charities collecting and using data risks perpetuating harm to those involved and the communities they represent, as well as exacerbating social inequality and unequal power relationships. For example, the process can be extractive, taking information from people and communities, for other people's benefit rather than their own. Data collection practices often focused on a deficit model (problems) rather than strengths and opportunities, as well as asking about difficult experiences.

Sociodemographic data was a significant area of contention, particularly where classifications differed between communities, funders and statutory bodies. Some were actively working to challenge existing classifications of ethnicity and how this data is routinely collected in public services. For example, our data showcase for LAWRS and

Sobus below shows how these organisations prioritised collating their own and secondary quantitative data (supplemented with qualitative research) in order to make their communities visible and influence local service provision. In these cases, data had a more complex role to play in their ambition to create change.

In some cases, qualitative methods (even if these were in addition to quantitative data and numbers) offered the potential to shift the balance of power and create more equitable research practices. Some were collecting case studies and sharing lived experiences to help make their stories relatable to decision makers. Others were involving their community in shaping their data collection and interpretation.

In summary, small charities are very clear that data has the potential to do more harm than good. Exploring how to make this ethical, safe, supportive and ideally, beneficial to those involved is vital. Shifting power to those involved is still a relatively new practice and this requires time, support and investment.

> *"We don't want our research to be extractive or to replicate the damage caused by existing systems of collecting data. The stories behind statistics can be traumatising for some communities. We want to be mindful of that and bring people along on the journey. We need to make data accessible to our communities."*

> *"Research is so important, especially when it comes from us, because we are service user-led and we have lived experience."*

Section 2

Our discovery research process

2.1 Who we spoke to

Throughout this research, we spoke to 36 small frontline and infrastructure charities and community organisations from across London (note that 5 organisations took part in multiple research activities). You can find out more about them in the Acknowledgments. We define small as having an annual income of under £1 million. Two large organisations took part in the research, because their operating income was under £1 million. They were redistributing significant grant or partnership funding. We recruited participants through Superhighways, including inviting people via a newsletter and direct emails to those who had attended training courses. The opportunity was also promoted by London Plus, London Youth, HEAR Network, City Bridge Foundation and DataKind UK. We also offered compensation for people's time, as a donation to the charity. This helped us reach very small charities. All were provided with information about Superhighways and were encouraged to access support available, particularly where they were struggling with a significant data challenge. Within our sample:

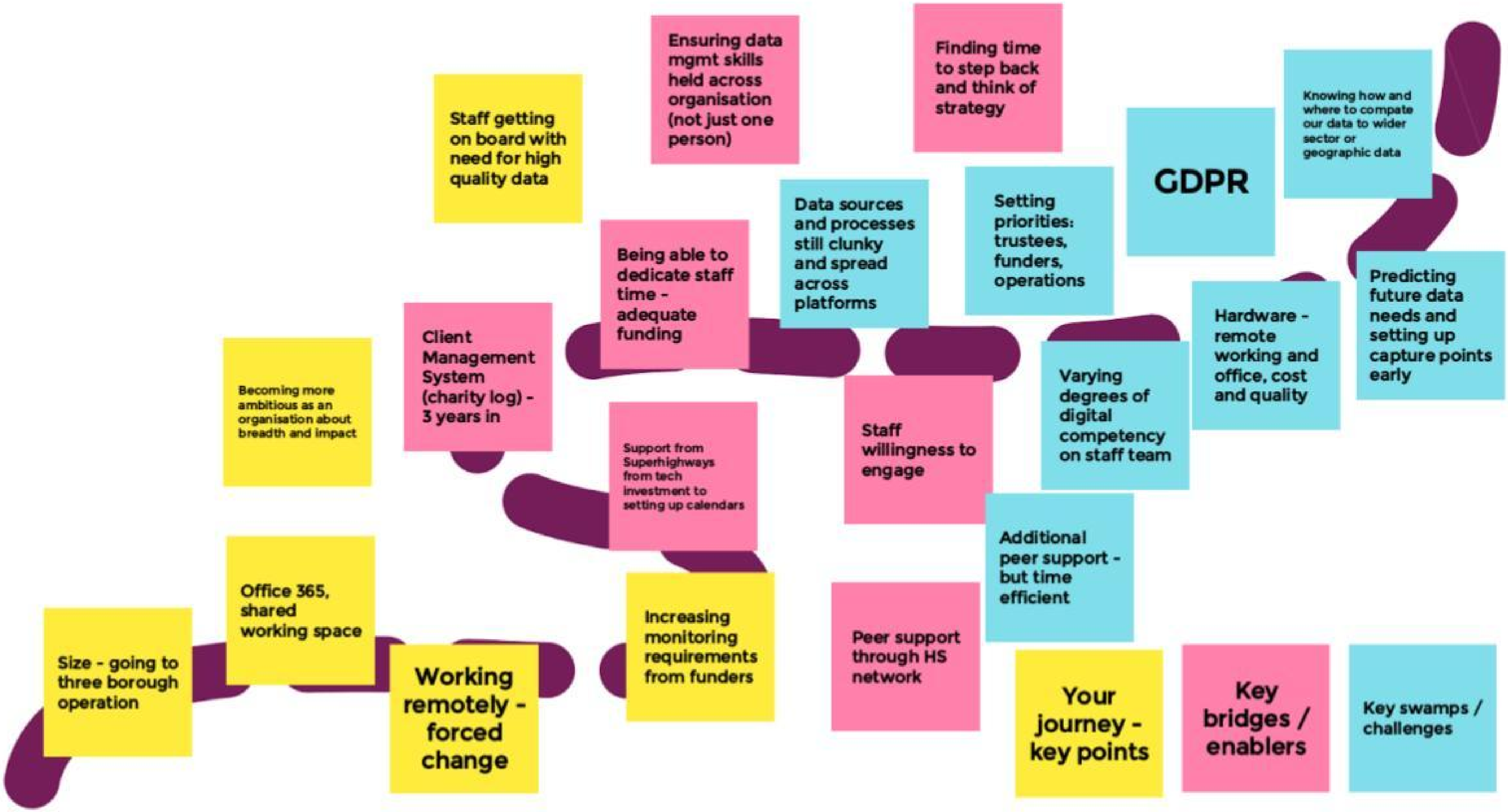
- ➔ Half had an income of under £100,000
- ➔ Two thirds had less than 10 staff.
- ➔ 60% offered frontline services and 40% were infrastructure and membership organisations
- ➔ A third offered pan London services, two thirds worked in specific boroughs
- ➔ Organisations spanned various stages of data maturity. Some described themselves as paper based, whilst others described advanced approaches and in-house systems and data expertise.

2.2 Our approach and methods

We undertook a discovery research process, building on existing research and undertaking our own qualitative research, focusing on journey mapping. This is detailed in the Appendices. Key phases included:

- **Initial discovery workshop**. In October 2021, we hosted a peer learning workshop with 8 participants to inform our research and test our collaborative journey mapping exercise. This exercise is detailed in the Appendices and an example is featured in Figure 2. We published this blog post to share our early insights.
- **One to one interviews.** In July - September 2022 we undertook in-depth one to one interviews with 15 small charities (recorded on Zoom and transcribed using Otter Ai). We asked about their journey, plans, progress to date and what support has helped, as well as key themes in the Data Orchard Data Maturity Framework.
- **Collaborative journey mapping.** In September 2022, we ran two journey mapping workshops with 13 charities.
- **Case study interviews.** In May 2023 we interviewed 6 charities about their success stories, to feature on the Datawise London site and in a blog post, in celebration of Small Charities Week and London Data Week.
- **Thematic analysis.** We identified themes from common discussions and our interview guide. We 'coded' quotes and copied these into a document for each theme, grouping these under subheadings (such as Tools and decisions). We reviewed each theme, compared workshop data journey maps and commonalities in the success stories. We then created a visual on Canva of a 'common' data journey, shown in Figure 1.
- **Sense checking findings.** We presented insights to research participants and at the London Funders Festival of Learning in May 2023. Their feedback helped us refine our visual map and prioritise what to focus on.

Figure 2: Example data journey map created in a workshop



Section 3

Data showcase

3.1 Why celebrate data journeys?

Throughout this report, we highlight a range of challenges charities face on their data journey. Data work is often painstaking and takes up a lot of staff and volunteer time. In this context, it is easy to lose sight of why data is valuable to small charities.

The following stories showcase what success looks like. They provide the bigger picture view, highlighting why data journeys are worth taking, investing in and supporting. These were originally published by Superhighways on the Datawise London site in May 2023 in celebration of Small Charities Week and again in London Data Week in July 2023. The short versions have been included here, with a link to a blog post providing more detail about their approach and advice to others.

Data showcase: Kentish Town Community Centre

Kentish Town Community Centre is an innovative building in the heart of Kentish Town, providing a foodbank service alongside indoor social, exercise and wellbeing activities. They also provide spaces which people can hire for fitness sessions, birthday parties and meetings.

In order for people to access community projects, they developed a simple registration form. This was linked to a QR code, allowing people to access services without needing to sign in and complete the same form every time. This has allowed them to map demand against indices of multiple deprivation and better target service provision.

> *"We are a geographic community centre serving a geographic area. We need data because we need to know where people come from, but more importantly, if there are certain areas of our local community that we are not supporting."*

We think it's great because: They've really worked hard to make life easy for those visiting the centre and their staff, whilst collecting the data they need. They are using data strategically and informing how they deliver their invaluable services for the community. Read more about Kentish Town Community Centre's approach and advice here.

Data showcase: Bromley Well, delivered by Bromley Third Sector Enterprise (BTSE)

Bromley Well is a partnership with local voluntary sector organisations, managed by Bromley Third Sector Enterprise (BTSE). Bromley Well provides a single point of access to services locally, helping people living in Bromley borough to improve and maintain their health and wellbeing. The service is paid for by Bromley Council and NHS South East London Integrated Care Board.

For residents, this means quicker referrals. For example, an elderly gentleman was referred due to hospital discharge. A house visit found he needed handrails. This was flagged on the system. They were installed within 48 hours. BTSE uses Charity Log and set up a shared data partnership to achieve this. They also use Power BI to help spot trends. They can now see that a third of people contacting them have a disability and that demand has increased from 12,000 to 14,000 calls a year, with a spike in demand for cost of living support. They share their insights with the council and use them to create new online resources.

> *"Better data has helped us improve reporting, spot trends, improve service delivery and be better advocates for the people we support."*

We think it's great because:
They've invested significant time to get to this point in their systems and data culture. The shared systems enable collaboration between partners and a better understanding of who they are helping and where. Read more about BTSE's approach and advice here.

Data Showcase: Latin American Women's Rights Service (LAWRS) and Indo American Refugee and Migrant Organisation (IRMO)

Latin American Women's Rights Service (LAWRS) and Indo American Refugee and Migrant Organisation (IRMO) supported over 600 Latin Americans to access a GP and Covid vaccinations in Southwark.

They gathered data in community languages during face to face delivery. They also collated case studies to bring data to life, showing barriers in action. Their report documents the barriers their community faces when accessing healthcare and fills an important gap in evidence about healthcare inequalities. It evidences the need for a grassroots approach.

> *"Data is important, because without it our community remains invisible.*
>
> *If you can collect data then do."*

We think it's great because:
Latin Americans are not included as an ethnicity group in the 2021 Census and in turn, in many monitoring forms. Grassroots data collection has provided vital evidence about healthcare inequalities. The report helps make this community visible. Read more about LAWRs approach and advice here.

Data showcase: Voluntary Action Camden (VAC)

Voluntary Action Camden (VAC) provides a social prescribing service. The Community Links team connects residents with community-based activities to support health and wellbeing. They use Salesforce to collate data on hundreds of referrals. Recently, this has shown an emerging need to co-locate wellbeing activities alongside cost of living support. They are collaborating with the council and local voluntary groups to respond.

> *"For us the real value is being able to use our data to work with others and help develop services which respond to local needs."*

We think it's great because:
The team and other organisations are now able to use data to help understand what's happening locally. They are thinking critically about what their data is telling them, based on what they already know and working closely with others to respond. Read more about VAC's approach and advice here.

Data showcase: Sobus

Sobus is a Community Development Agency and the Council for Voluntary Service in Hammersmith & Fulham. They set out to explore the prevalence of mental health issues in minority ethnic populations in Hammersmith and Fulham. They knew this was an issue locally and needed detailed local data to convince stakeholders to act.

However, they lacked the data skills to undertake this advanced level of analysis. They turned to Superhighways for support to design and undertake this project. They also turned to Datakind volunteer data scientists for a datadive combining datasets. They created a compelling report, which evidenced a high statistically relevant correlation between deprivation, ethnicity and mental health issues. The report has led to new investment in local mental health prevention and support services.

> *"Data is persuasive and hard to ignore, especially when external experts are involved. When you publish a report about data, it gives your work legitimacy."*

We think it's great because:
Sobus had never taken on an advanced data project like this, but they knew it was desperately needed to advocate for change. They sought support and mobilised their local knowledge, networks and connections to make it a success. Read more about Sobus' approach and advice here.

Section 4

Pathways, swamps and bridges

4.1 Goal: Collect better data

Small charities plan and collect data in the right way for them. They know what they want to collect and why. This includes planning their analysis and how they intend to share and influence using their insights.

They are confident in the questions they ask and how. They have the desk space, devices and software they need. They use free tools when helpful. They take the time to review and pilot data collection tools.

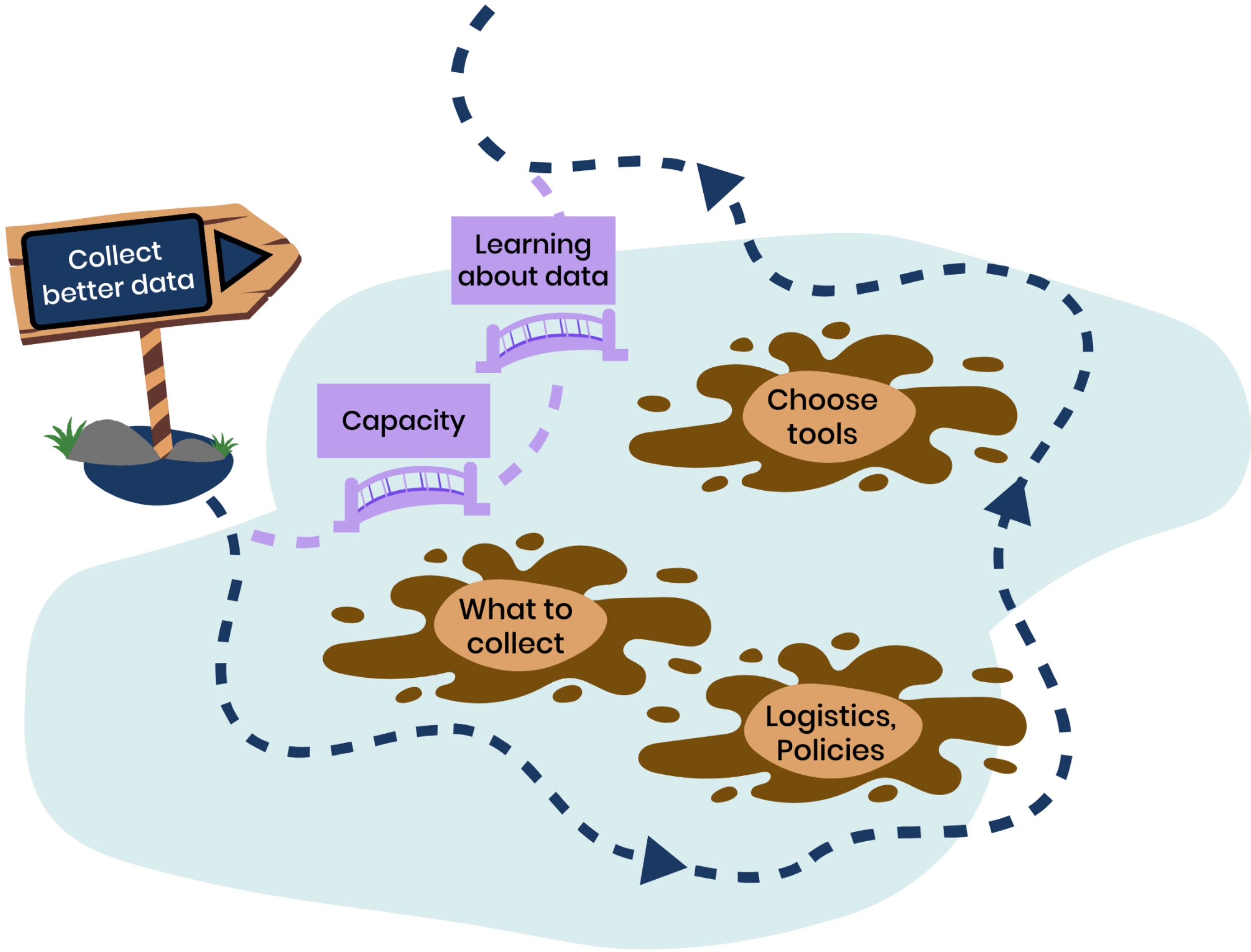
Their policies ensure they are collecting data legally, safely and securely. They explore the ethical implications of their data collection.

Context

Small charities will often get started with purposeful data collection, because they have encountered a clear reason or need. They may already be collecting data, but this is likely to be unplanned or unstructured, or they may have a new purpose and want to collect data in a different way. For many, the motivation will be applying for funding or reporting back to a funder. Others will want to understand what their community needs or wants, in order to inform their own work or to influence others.

Swamps: Deciding what to collect, choosing tools, working through logistics and developing their policies.

Bridges: Capacity and learning about data



> *"I want to find a way for my volunteer drivers to collect important data, especially if we're having befriending conversations where there could be information that is crucial to our service. Is there a way, or some digital space where they can put, I don't know, comments at the end of their day when they've finished their shift. Even if it was a simple digital sheet that's got five questions online, that they can feed in and it goes into a spreadsheet somewhere. Then I can look at it each week to see what they're experiencing when they go out."*

> *"Data is becoming a bit of a challenge, because you know there is a simpler way once you have the skills and the tools, but there are so many options for data collection tools out there. How do you strategically decide, this is the best way to go? There is so much information freely available. It's just you're so stretched for time and you really want to make a decision and you're just trying to figure out, who do I go to, what should I use, what's right for me?"*

> *"We generally have an idea that there's an issue within the community, because people are ringing us up quite a bit about it. But when you're thinking, well, is it only people ringing us who are actually affected by it or is it more widespread? And then you can do the annual survey and then you find out yes, that is an issue actually. "*

➔ Swamp: What to collect

At the start of their data journeys, small charities often struggle with knowing where to start when it comes to deciding what data to collect, how to collect it, or what to ask. For those we spoke to, funding requirements, or a desire to prove impact and influence change underpinned why they wanted to collect data. However, translating this into practice proved tricky. Those providing responsive and holistic support to specific communities struggled to narrow down what they should be asking. Whilst those working with people in crisis or providing active sessions needed to navigate when to interrupt this to undertake data collection. For some, qualitative research made more sense, either to gain an in-depth understanding of experiences, or because talking felt more natural than form filling. Others recognised that this approach would take too long, or could be unsuitable for the people they worked with. It took time to create an approach which made sense for the context and people involved.

> *"As a community centre it's very difficult to focus on what we should be doing and collecting, because it changes every day as soon as people come through the door."*

Overall, a key challenge is that data work is often taken on by someone who is motivated, but already stretched for time. They may also have limited experience of planning data collection or seeing how this is later analysed and used. In this situation, they needed to learn a lot about approaches, terminology, tools and good practice in their sector. Designing data collection tools (such as an interview guide or survey) and creating good questions are skills which need to be learnt and then further developed in context, through practice, trial and error. A further concern was how to collect data sensitively, without affecting relationships and delivery. It was helpful to learn about standardised measures and good practice in creating questions. It was also helpful to find out what other charities like them ask and in turn, how they use that information.

All the small charities we spoke to returned to this question time and again, although this was important, rather than something that should be avoided. However, a common pitfall was to collect too much data. Another was collecting data in different ways across multiple team members and projects. As a result, they would later get stuck when trying to combine, analyse and make sense of the data they had. This often occurred when multiple funders were involved, or data was collected across wide ranging programmes. Planning data collection and analysis could help here, particularly when looking at the need to report to multiple funders. Alternatively, it was crucial to audit and simplify what was collected. Others simply needed to collect further data and ask different questions or use a different approach to better understand the data they had collected. Overall, small charities would benefit from spending more time planning and piloting their approach, from start to finish, as well as exploring the value of different approaches and methods to collect data.

> *“I need to evaluate us as a service. But even with feedback forms it’s difficult, because our young people speak so many different languages. We tried just using pictures of the activities we ran on Jotform, but they ticked all the boxes even where they hadn’t been involved. They thought I was asking them what they would like to do.*
>
> *So it might just be talking to some young people individually, but if you've got 50 young people at a session, you don't really have time to take one into a room and talk to them for about half an hour. There's not enough staff to cover the rest of the space. ”*

➔ Swamp: Logistics and policies

Data collection poses a number of logistical challenges. Some small charities needed additional equipment (such as laptops, phones and devices), or had to rely on paper forms. This may be preferable, but could also create a lot of manual data entry. Some also struggled to find time and office space for data work.

Small charities need to work though data protection, risks and security, including The Data Protection Act 2018, the UK's implementation of the General Data Protection Regulation (GDPR). This could include establishing informed consent and privacy policies to establish a 'lawful basis' for processing personal data. These needed reviewing with each new contract, funding or data collection tool. Data Orchard also reports that charities need to get better at deleting data. Those new to data worried this needed more care and attention. Some felt they were too stringent.

Finally, a number of small charities were wary of the potential harm of collecting data, whether this was due to anonymity or where it perpetuates bias and structural inequality. Collecting socio-demographic data was challenging in this respect. For example, their classifications and language around ethnicity may differ to that requested by funders and local authorities, because it is more appropriate and relevant to their communities. Working through ethical concerns and risks was vital to moving forward with data collection.

> *"We are registered with the Information Commissioner's Office and we've got quite a strict GDPR policy. It's quite a big issue because so many people wouldn't like to be identified as coming into our organisation. So we have to be careful and we've gone beyond our legal remit on the basis that it's better to be on the safe side. But I think there's some things we have gone over the top with in our policy. I think we need to review it again."*

➔ Swamp: Choose tools

Choosing tools was complicated for most small charities, throughout their data journeys. They often have limited budgets to pay for tools, software and subscriptions. They may not anticipate these costs in advance of making a funding application, or may not know whether a funder will be open to covering these costs. Subscription costs are often annual and difficult to divide across funding streams. Many funders also restrict cost to direct delivery and do not cover the costs of collecting and analysing data (time or tools).

Free or freemium (basic versions of paid tools) tools are invaluable to getting started. They helped small charities learn what they needed from tools, as well as allowing them to collect data. However, these also have limitations, such as the number of responses they can collect. Even when charities had a budget to pay for tools, they were used to operating on a shoestring and were unsure about what to invest in. They also need to consider accessibility, particularly where staff, volunteers and clients struggle with digital skills, as well as access to devices and data to access the internet. Whilst paper forms and free tools worked well for some, others felt these were a hindrance and created additional challenges around data entry and analysis.

> *"Automating our membership system was a real turning point. Before it was paper forms and someone had to type them into Salesforce, now that information automatically goes on to Salesforce when members join. It saves time and it meant that we could ask more questions, because it wasn't going to be someone sitting there manually entering the data."*

Bridges: What helps to collect better data?

Bridge: Capacity

- ➔ Office or desk space with good internet, access to devices and laptops, cloud based working
- ➔ Someone motivated to take the lead on data
- ➔ Core roles with regular time built in for data work
- ➔ Funding / Budget for a research or data project
- ➔ Funding / budget for tools and subscriptions
- ➔ Simple clear funder reporting, in line with [IVAR's Better Reporting principles]
- ➔ Time to work as a team to decide what to collect
- ➔ Scope to pilot data collection or test approach and get feedback

Bridge: Learning about data

- ➔ Seeing what's possible / what other charities do
- ➔ Knowledge of data tools and approaches, their limitations and what they do well
- ➔ Guidance to develop policies (GDPR, security) and informed consent for data collection
- ➔ Training in qualitative and collaborative data collection approaches
- ➔ Creating a data collection plan including an analysis framework, thinking through audiences
- ➔ Support to assess ethical concerns, consequences and risks
- ➔ Ad-hoc expert guidance on data collection

> *"We find out about a lot of reports, census data, this survey or that, but actually to hear from others about similar sized organisations how they work with data day to day and what they do with it, practical tips. That would be really useful."*

4.2 Goal: Make sense of data

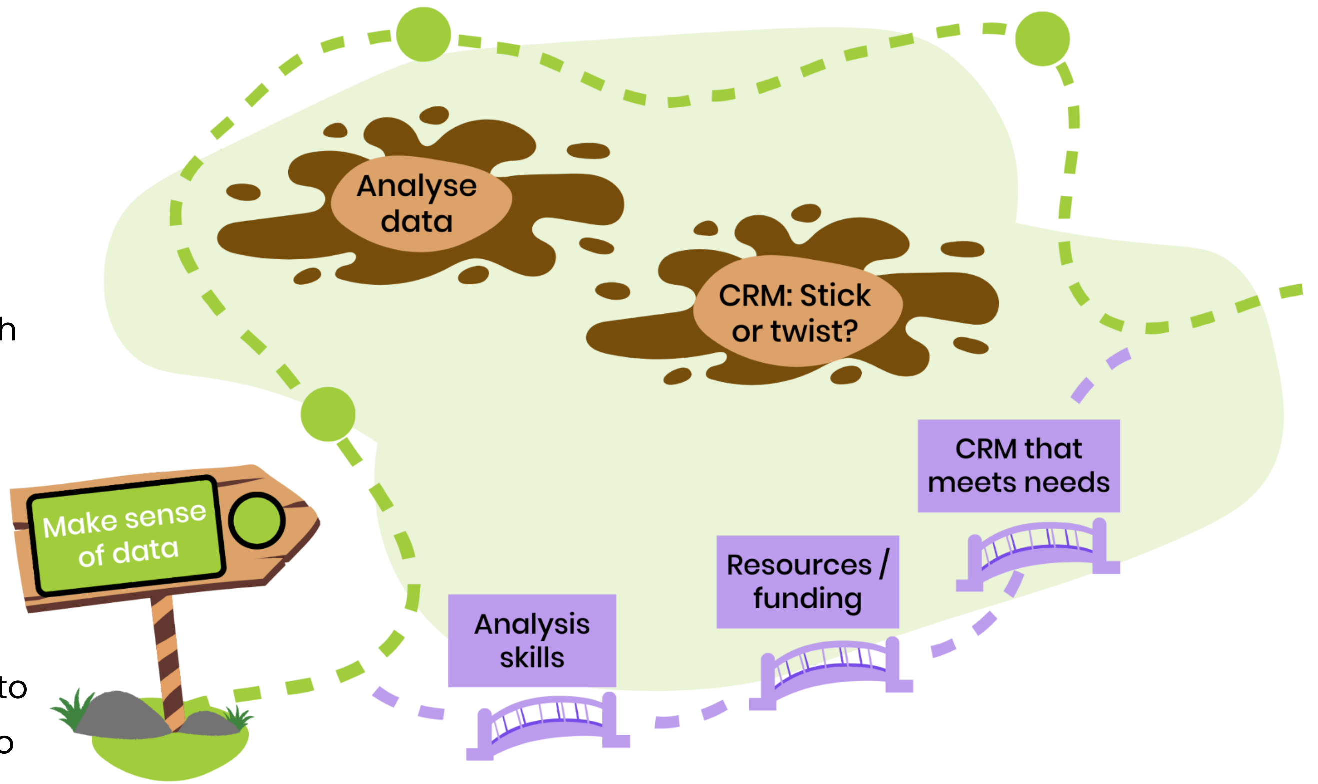
Small charities make effective use of their CRM, data tools and spreadsheets to extract, analyse and make sense of data. They have practical data skills to analyse numerical data. They analyse qualitative data and make use of digital and secondary data effectively. They feel confident deciding whether to start using a CRM, or whether to move to a new CRM.

Context

At this stage, small charities will be looking to find insights from their data. It is likely that someone will need to take responsibility for data at this point, but it may not be their main role. They are likely to rely heavily on spreadsheets, CRM reports as well as tools with in-built data visualisations.

Swamps: People get stuck when trying to analyse data, whether that involves using spreadsheets, qualitative data or secondary datasets. Many will also broach the decision about whether they need to get a CRM, move to a new CRM or abandon their CRM and revert to data collection tools.

Bridges: Key to moving forwards are analysis skills, a CRM that meets the organisation's needs (if needed) and resources or funding.



> *"I haven't done a project like this before, it's quite daunting. Now I'm at the analysis stage and there is a lot of data to look at. A lot of people give feedback at a lot of points. I feel a bit overwhelmed with it. There is no expert at these things within the organisation and there is definitely a gap in knowledge. This is how I came to Superhighways."*

> *"It's actually really challenging to get good data on the state of the sector. You can query Charity Commission data and we're hoping to plug that into our Salesforce with an API. On top of that, we've got all of the not for profits that aren't charities, that are below the radar because they are not registered or wouldn't have to submit anything."*

> *"At the moment, it can be quite cumbersome extracting the data we need out of our database. We're focusing on revising our reporting processes to make them much more streamlined, efficient, user friendly, and more useful. Reporting is definitely one of our weaker areas, because it was prescribed by our contract specification. It was designed to kind of say we hit a certain specific number of clients seen and things like that. It doesn't tell us the difference that we're making. So we're trying to reshape what our contract reporting looks like and reduce the burden on individual services doing reporting."*

➔ Swamp: Analyse data

There were three key challenges when analysing data: Spreadsheets, qualitative data and secondary data.

Firstly, **spreadsheets** (either Microsoft Excel or Google Sheets) were fundamental tools for data collection, reporting and analysis for nearly all research participants. Most were creating these by extracting data from a digital tool or their CRM. This process could be incredibly difficult and would in turn, create a lot of data that needed further cleaning and manipulation (see 'CRM: Stick or twist?'). Others entered data manually into a spreadsheet from their records, paper forms or interview transcripts.

Whilst this was an invaluable tool, the challenge when undertaking analysis and making sense of data was learning about **advanced techniques and formulas**. These were vital in order to transform, join and analyse datasets effectively in spreadsheets. Those with basic skills spent hours completing simple tasks, such as manually counting data or copying information between worksheets. Many of our research participants had realised this and participated in Excel training with Superhighways to help with their analysis. They all recounted ways in which their data work was easier now that they knew what was possible and could use formulas and pivot tables. This subsequently led to some adopting Power BI with their spreadsheet data to make it easier to see trends.

> *"The Superhighways training on using Excel was really helpful. I think I got better at better data analysis and much faster, because there were some things I was doing in a really long winded way, because I'm self taught. I thought 'oh I didn't know you could do that'. Sometimes you forget how to do things if you haven't used it for a while. So when I'm doing the annual survey analysis, I go back to my notes from when I was doing the data analysis course."*

Secondly**, qualitative data analysis skills and tool use** looks to be a key gap and warrants further exploration. Many participants collected qualitative data, often through interviews, focus groups, written feedback and client notes. They felt able to create quotes and case studies to bring their numerical data to life in a report. They often had extensive experience of their research topic and participants, which made it easier to identify emerging trends from their qualitative data. However, some wanted to do more with their qualitative data, but were uncertain about when a more robust approach would add value, or may lack skills to do this. Even those with qualitative research training (from university studies for example) struggled to find the time to apply their skills. Digital tools for qualitative analysis were a further challenge. Workshop discussions highlighted how these were designed for academic use and as a result, were both too sophisticated (or not user friendly) and prohibitively expensive. In the meantime, spreadsheets and documents are widely used to analyse qualitative data (as we have in this research).

This does look to be changing. We have seen new digital tools for qualitative research launch, whilst others are being updated and pricing models are changing. However, awareness and use of these tools is limited. It was common to commission out qualitative research. Some participants felt their funders were starting to value qualitative data more. For some, qualitative methods (particularly peer research and co-design) were vital to shifting power and valuing lived experience. Further skills and access to digital tools could add value here.

> *"We have basically every interaction with the client recorded on the system. So there's a huge amount of qualitative case notes, which is used for both supporting the client in service delivery in a holistic way and also to tell us what the ongoing concerns and issues are with clients in the borough."*

Thirdly, **secondary and sector data** was particularly challenging and required a steep learning curve. Those we spoke to made use of data on deprivation, free school meals, poverty, health inequalities (such as GP registrations), prison populations and use of mental health services, as well as local funding and charity registrations. They often set out to identify trends and gaps according to ethnicity and geography. Many also compared or combined this with their own internal data. Challenges included:

- Finding out what datasets are available datasets for a place, sector, service or issue
- Accessing those datasets and extracting relevant data for specific locations or demographic characteristics
- Combining datasets from different sources about a specific location or demographic group
- Grappling with how to overcome gaps or differences in how different datasets are created or published
- Learning about how a specific dataset is produced, processed, released and updated
- Making sense of different datasets and comparing this with internal data
- How to influence the production of those datasets or share back findings with those who create them
- Longer term, looking at how to publish internal or shared data for others to use as secondary data

This often required either advanced knowledge or expertise. Those who succeeded employed or paid for a data analysis expert and/or engaged with external support from organisations such as Superhighways or Datakind. Those grappling with these challenges felt isolated and peer learning could be particularly helpful at this stage.

> *"There seems to be a lot of variation in the national statistics available on this in terms of how much they're broken down in different ways. So you might be able to find one metric that's broken down by geography, but not ethnicity, then another by ethnicity, but it's for the whole country. So there's a lot of inconsistency in how disaggregated it is."*

Finally, there were also two areas of data analysis which were not discussed by participants and look to be potential gaps.

Firstly, **analytics from website use, page views, downloads and searches** look to be a potential gap in skills and practice. The Charity Digital Skills Report 2023 highlights that just under two thirds (57%) of charities say they are poor at learning about users from their website and analytics data. However, one organisation was using their website to look at patterns in search terms and comparing downloads of resources to identify demand and emerging support needs.

Secondly, the release of **ChatGPT and advances in AI technologies** largely emerged after the research for this project ended. This could radically shape how organisations work with data, as well as the risks and ethics of doing so. It is likely that many small charity and community organisations will be interested in this area, but may not have the capacity or skills to explore it further. According to the Charity Digital Skills Report 2023 73% of charities say they don't feel prepared to respond to the opportunities and challenges that AI brings. This also warrants further exploration and peer learning.

➔ Swamp: CRM: Stick or twist?

Spreadsheets were often central to data collection, yet many would reach the point, particularly when analysing data, where they realised they had too much messy data in too many unwieldy spreadsheets. They were seeing spreadsheets fail, particularly when contacts needed updating or had multiple records attached to them. Their spreadsheets started to feel 'risky'. It was too easy to accidentally delete, change or lose data, version control was difficult and it was difficult to protect personal data. At this point, many reflected on the potential value of a CRM. They felt this could help them better manage and analyse their data, but were uncertain about whether this was the right choice for them. Two key hurdles stood in front of them when trying to make this decision.

Firstly, there was a lot of fear around making this decision. Many had heard about what can go wrong from others and some had first hand experience of this from previous roles or efforts. It felt risky to put all of their data into one system, only to discover they were locked in to this or could not get their data out again. All worried that the wrong choice would cost a lot of time and pain. Secondly, most had limited, if any, budget for a new system. They were aware that a new CRM can be expensive and time consuming to implement. Whilst some wanted to consider freely available options (such as Airtable) or those discounted for charities, they were often uncertain about what existed or whether free options could work for them. Others were sceptical about the limitations of free options but also were uncertain about what they should pay for.

> *"We are still finding it difficult. We know what we want. It's just finding the right system...it needs to be very low cost or free"*

Those with a CRM all considered at this stage whether to move to a new system, particularly when they struggled to create reports from the CRM or extract data into a spreadsheet. Fixing cumbersome reporting needed time, technical skills and in many cases, paying for an external tech provider. This could be expensive and some reported long waiting times to make changes. Most chose to stay with their current system. They too were conscious of the time and costs involved in changing. This included the need to research and scope what exists and the costs again, understanding their own user requirements before implementing the new system and migrating the data, as well as training up staff and reviewing processes once again. They were also aware that other problems could arise.

Furthermore, they could see how poor staff buy-in and use of their current systems and processes (see the 'data culture' swamp) would remain even if they were to move to a new system . It would take time to identify how to streamline processes of collecting data. This needed exploring and reviewing first, before deciding whether to stick or move on from their current CRM. More often than not they would revert to spreadsheets to work around problems and make up for poor reporting and analysis functions. The question as to whether to move to a new CRM was re-visited every few years. As the Charity Digital Skills Report 2023 also reports, 53% of charities say their CRM is causing significant challenges for their organisation.

> *"I'm thinking I really should be getting some sort of client management system, but I'd have to either pay for one or adapt a free version. We'd have to have everyone trained, make sure that all the data was in the right format and enter it into the system. So I am weighing it up. For the size we are, do we need it? Have we got a month to spend transferring data over? Is it more valuable than our work with clients when Excel works OK? At the moment I think no."*

Bridges: What helps to make sense of data?

Bridge: Analysis skills

- Someone formally leads on data
- Practical training on excel, analysis, visualisation
- Understanding and exploring secondary data, with other charities
- Time to work on analysis
- Actively looking at data trends
- Seeing other people's spreadsheets and analysis
- Developing qualitative analysis skills
- A purpose for analysis (eg to produce a report)
- Finding out how web analytics are set up and what they can show
- Accessing expertise for advanced systems development and data analysis

Bridge: CRM that meets needs

- Reviewing internal needs around a CRM
- Identifying how to streamline processes
- Learning how the current system / reporting works
- User research internally to understand issues
- Exploring what CRMs exist, costs, pros and cons
- Peer learning and sharing experiences
- Researching what other charities use
- Seeing what's possible with other tools (Airtable, Power BI) for data capture and analysis
- External advice or systems review to assess whether changing to a new CRM will help
- Identifying costs and how to resource them

> *"The Airtable User Group with Superhighways was really helpful to see everything that Airtable can do, and to see people run their entire organisations from Airtable and setting up endless automations like sending out welcome emails when people sign up to integrating their database with Google Maps"*

Bridge: Resources / funding

The need for budget and funding was clear at each and every stage of the data journey (see the key learning about how funders and funding affect data journeys and the bridge for 'capacity'). However, it is particularly helpful to move on from this stage. Developing a data strategy which included a plan for resourcing data costs helped with this (see 'What helps to act on insights'). Participants were also able to move forwards when they accessed externally funded support at this stage, particularly in the form of advice from digital, data and technology experts, training on data analysis skills, guidance and resources and peer learning sessions.

Significant internal budget and/or funding was crucial to invest in:

- Core roles dedicated to data (administrative work and/or skilled analysis work)
- Roles with dedicated time for key tasks such as data analysis or systems development
- External support from a freelancer or agency for data analysis or data projects
- Scoping CRM requirements
- Implementing and tailoring a new CRM system
- Bringing in external advice or paying someone to set up a system

> *"We've got Salesforce for free because we have less than 10 staff and I've been putting everything in there meticulously. I can easily see how many times a young person has come or the most common ethnicity. It's taken us hundreds of hours but the free support is ending and I've no idea how to set up reports on it."*

4.3 Goal: Act on insights

Small charities have a culture of valuing data and acting on this, to improve services and operations. All of those who collect data understand why and are comfortable doing so. Data quality is high. Everyone can access data and learn from data insights. Data is used to inform and improve service provision. CEO's and Board's see data as part of the organisation's mission, vision and strategy. They invest in data roles, skills, tools, systems and outputs.

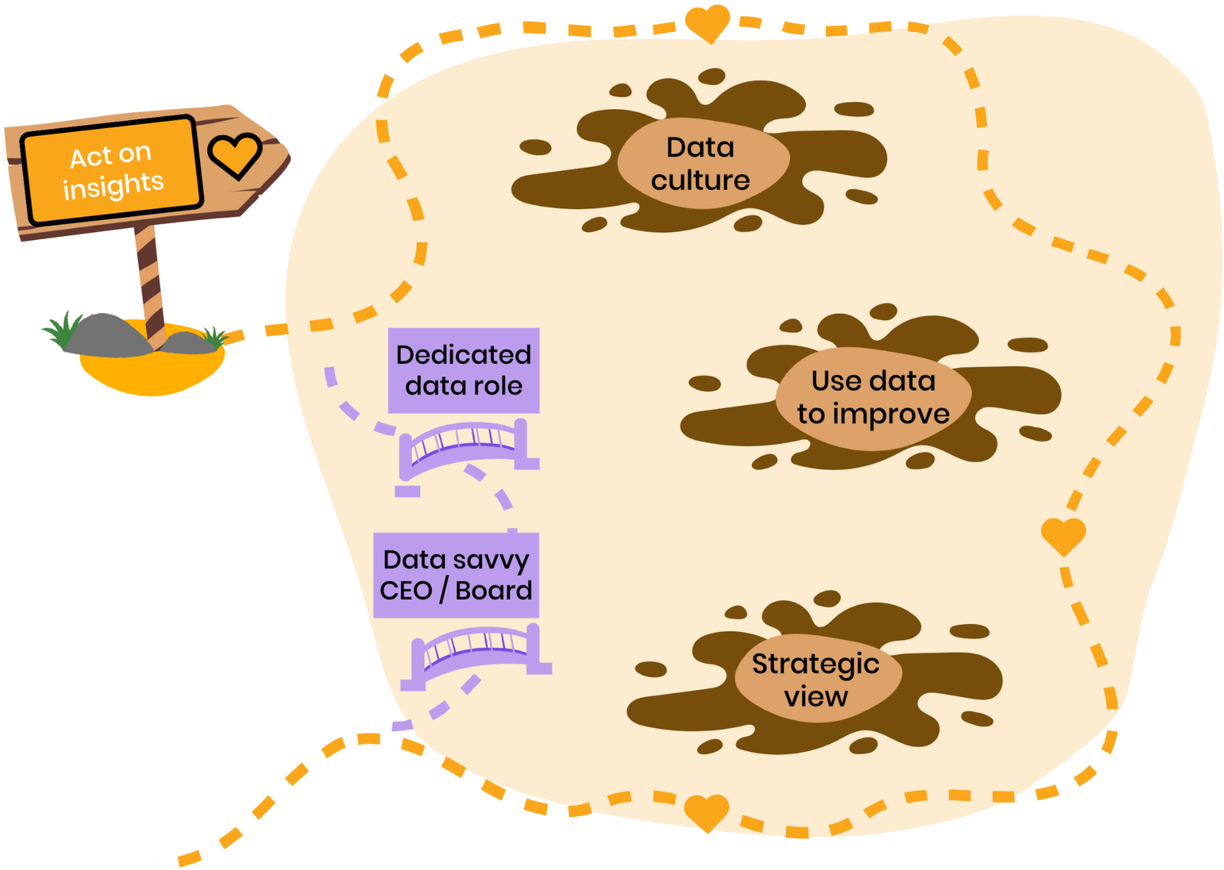
Context

Once small charities were in the flow of collecting and making sense of data, they started to think more strategically about analysing and using data, testing and finding ways to put data at the heart of improving services and operations.

Those working with data reflected that they could no longer do this alone.

Swamps: Developing a data culture was a key sticking point here, even for very small teams. Finding ways to use data to improve and take a strategic view needed everyone to value and work with data in their role.

Bridges: A dedicated data role and a data savvy CEO or Board are both vital to help to get everyone on board and to develop a strategic approach to data.



> *"How do I start to instigate change, but also bring everyone on board? We have over 100 frontline staff and volunteers collecting and inputting data as part of their service delivery. How do I build that culture where they realise what they put into the database about our clients is so important for the organisation to think strategically? We've got all of this incredible data, how do we use it to inform what we do, and improve our service delivery? Trying to do both strategic and operational stuff at the same time has been a challenge."*

> *"Because we've not had a role dedicated to data, we've probably not been able to communicate as well as possible to other staff. Hopefully, now we've got this new role, we can start going through our members' journey and visualising it, they'll understand and appreciate why we collect data. It can be a bit of a drag getting people to fill in the quarterly monitoring. We need to make sure we tell people why we need that data, we're not collecting to check up on you, we're actually using it. It gets reported to the trustees. It goes to the council."*

> *"My high level vision would be for us to become a research or data orientated organisation, where good quality data is driving our decision making and direction at all levels. I think we've got fairly robust client data, but we don't analyse it as much as we could."*

➔ Swamp: Data culture

Those leading on data often discussed the need to 'get everyone on board' as a key swamp they got stuck in. This often stemmed from undertaking data analysis highlighting missing data and other issues with data quality. At this point, data was seen as their role alone, but they needed everyone to take ownership of this. To address this, they needed to help others to understand why they needed to collect data or ask certain questions. This might involve presenting data insights back to the team, using data to celebrate achievements in internal communications or demonstrating how data was being used to report to funders or trustees. It also helped when whole teams were involved in planning data collection or creating a theory of change.

They also needed to address any pain points during the process of collecting, entering and processing data. For example, some found that staff or volunteers found it hard to ask questions about ethnicity and other demographic data, because it felt awkward or irrelevant. Others could see that data entry was taking a long time, or that online tools were difficult to use in service delivery. Ironing out these problems resulted in less resistance to data work.

> *"Collecting equality and diversity data has really improved. A year and a half ago, 50% or more of the entries would be unknown, we'd have no data collected. No one asked the clients and no one wanted to. But we've managed to change the culture to get people to ask the questions of clients and populate that data, so we know who we're reaching."*

➔ Swamp: Use data to improve

Once in the flow of collecting, analysing and reporting, those working with data would start to see patterns emerging. They began to think more critically about what the data was telling them and how to respond. However, it was challenging to transition to a culture of critically engaging with data and acting on this. They focused on finding ways of identifying compelling trends in their data and presenting this in a format that gave others confidence to respond. Data literacy internally was a key challenge at this point. Much of their time was spent supporting others to use data tools and how to interpret data (and its limitations) effectively. It was common for Boards and CEOs (and others) to be uncertain about how to interpret or respond to data presented to them. Some participants were wary about the pressure to present data as a 'success story', particularly when external funding was involved.

At this stage many returned to collect new data or analyse this differently. Further qualitative data, such as client feedback and interviews could help identify areas for service improvement or new services for example. Visualising data and data dashboards could also be helpful for highlighting changes in demand. Sector data could provide a comparison or highlight gaps in delivery. It took dedicated analysis time, patience and effort to develop and test these different approaches. An engaged Board and CEO or a funder asking questions of data could also help determine the most useful questions to ask, in order to act on data.

> *"My main motivation came from the requirement to produce quarterly monitoring reports for our funders. It was only when I started to do that on a quarterly basis, that I started to build up a pattern with that data. That made me realise the real motivation should be to understand if we are providing the sort of service that clients want."*

➔ Swamp: A strategic view

Strong support and engagement from the CEO and Board members was vital to advance any further with data for three reasons. Firstly, they were integral to building a data culture. Secondly, they needed to engage with and act on data strategically, to inform decisions about existing or new services, or to improve operations. Finally and most crucially, they needed to think more strategically about their ambitions for using data in their organisation as well as how they want to move forwards on their data journey. This in turn, would give them confidence to invest further in data roles, systems and tools. At this point, data and digital journeys often became one and the same thing.

The level of support and engagement was incredibly varied across those we spoke to. For five of the 30 of those we spoke to, the CEO or trustee was leading on data (they also had a very small staff team or no staff). This worked for a few years, but additional administrative support, or external capacity (e.g. from a skilled volunteer, consultant or evaluator) was much needed. At the other end of the scale, some people leading on data were working hard to bring their CEO and Board on the same journey as them. This was often hard and frustrating. What helped in this scenario was similar to securing staff buy-in. Presenting data and testing how to do this in a meaningful and engaging way would often help spark an interest in data. In time, a data maturity assessment or a theory of change process could also help get everyone thinking strategically about the value of data and their data journey.

> *“I have been very disappointed with the lack of support from the trustees. They don't know enough to realise that they're making mistakes. Our CEO, who recently joined us, wanted to put most of the booking appointments and assessments on the internet and she got shut down. They’ve not paid the money to upgrade the website to be able to do that.”*

Bridges: What helps to act on insights?

Bridge: A dedicated data role

- ➔ Focus on staff buy-in
- ➔ Understanding data collection pain points and designing better processes
- ➔ Upskilling and training staff
- ➔ Presenting data insights internally
- ➔ Getting feedback and ideas from staff
- ➔ Presenting data reports to board meetings
- ➔ Continuing to improve systems and use of data

Bridge: Data-savvy CEO and Board

- ➔ A skills audit (to include data / systems)
- ➔ Asking for data and acting on this
- ➔ Data skills and critical thinking
- ➔ Developing a data strategy (why the organisation values data and how to move forwards with data to improve)
- ➔ A Data Maturity Assessment
- ➔ Investing in data roles, skills, tools and systems
- ➔ Developing a theory of change

> *"What I wish I'd known is the value of planning your data journey, potentially for the next 5 to 10 years and actually, making sure to get buy-in from the rest of the staff etc. And that is as important as any other strategy within the organisation, a fundraising strategy, a comms strategy. I mean data really is part of all of those anyway, but really trying to plan that as part of longer term thinking is so important."*

4.4 Goal: Influence change

Small charities publish insights in a compelling format and proactively share these with relevant audiences. In turn, those audiences engage with the findings. They are able to explore shared data challenges and participate in or lead on initiatives to address these collectively. They have the capacity to network and share expertise and insights regularly in relevant forums. They become stewards of data about their area of work and this informs policy and practice.

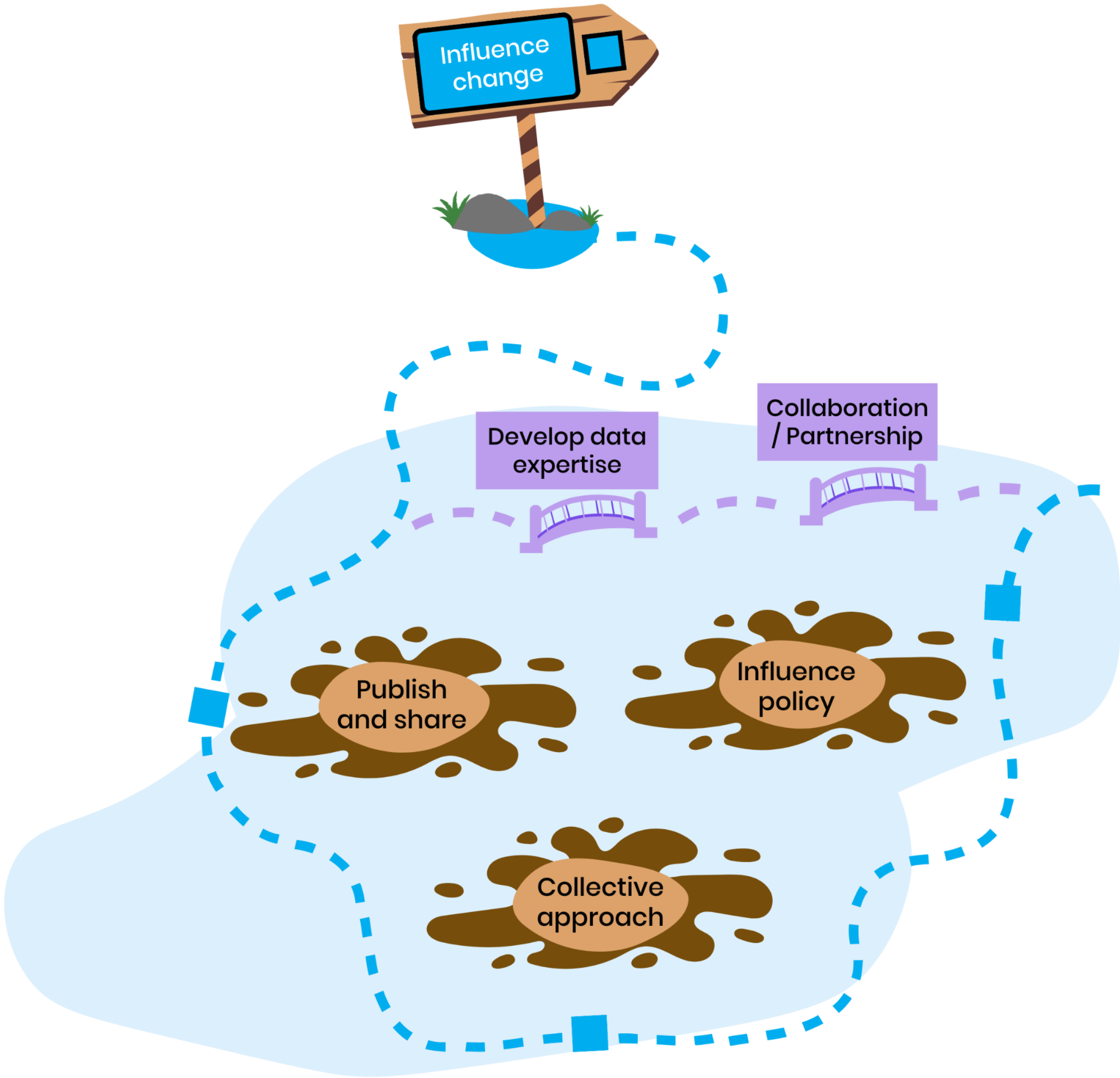
Context

Not everyone progressed to this stage, or ever intended to. Only some wanted to use their data further to influence policy change. For those who did, their focus extended beyond their own work, to share their insights and influence others to respond.

Swamps: A key step and challenge was publishing insights to share externally (such as a report, website or blog post).

A handful of organisations invested significant energy into influencing policy and / or developed a collective approach to share their data and systems, often in order to inform their work and influence change.

Bridges: Partnerships and collaborations are key to success here, as was developing data expertise internally, particularly in complementary roles.



> *“I think we're quite good at collecting data, but I don't know that we're that good at using it for intelligence, sharing it and being more open about what we’ve got, to influence and develop support for the sector.”*

> *“We’ve noticed an acute crisis bubbling under the surface as people come to us. If I could write a report and put data in it, I could tell that story.”*

> *“Part of our role as an infrastructure organisation is helping our network to get better at collecting and using data as well, not only for them, but for us, so we can collect it and do something useful with it. We all use the same CRM and we've been doing various workshops around reporting, and how you make best use of it. We have a champions group so they can get peer support. There's a whole piece of work around developing data standards for managing inquiries, there's all sorts of little bits happening all over the place. In an ideal world, that would be a fully funded post that was able to take hold of the strategy for our organisation, as well as the strategy for how our network improves.*

➔ Swamp: Publish and share

Publishing a report was often an end goal for many small charities working with data. We also uncovered a few instances of small charities creating reports to share their findings and in turn, using these to influence policy (discussed below). Those with a strong culture of sharing learning openly were also more likely to succeed. This was also much easier when data was collected with the intention to publish and share this.

However, there was rarely sufficient planning, intention or budget to publish reports or share findings effectively. It was common to talk about reports which remained unfinished. For some, this was because of a lack of clarity or agreement on their messaging internally. They may lack confidence in their data or the story they want to tell. Those in the midst of analysis also worried about how to write a 'good' report and what this should look like. They could also see the risk of writing and publishing a lengthy report which subsequently lacked impact. Examples were helpful at this point, particularly for inspiration. A number of participants were also looking to learn more about data visualisation and storytelling. Most felt they would benefit from additional input (from colleagues or external paid support) to improve their writing and design of any reports or other outputs, as well as to help reach their audiences on social media.

> *"I'd like someone to go through our data and do some analysis of what's happening over the years, for example, with a rise in homelessness, then present it in a really engaging way, getting those design features in it, so it's not a really boring report, but something that you can just look at and really get the point that we want to make."*

➔ Swamp: Collective approach

This research found a handful of small charities creating shared infrastructure and coming together to design new ways to collectively gather data and act on insights. Bromley Well's data showcase offers a good example, where a shared system and data agreement allows voluntary sector organisations to streamline referrals and collate data. We also came across initiatives in the early stages, such as work to define shared measurement approaches or data dashboards to make this accessible to partners. This was most common amongst infrastructure, network and membership based organisations who could realise the value of collating sector or local data (see for example, Voluntary Action Camden's data showcase).

Capacity was a key challenge for all those involved at this point. This type of work was rarely funded (although it may later attract or make the case for funding). It necessitated a dedicated data or digital role internally (often senior) with motivation and expertise to lead on further systems development. Robust systems were also crucial (so they could trust their data), alongside a strong data culture and strategic focus on data. Those working in this field benefited most from bringing in expert advice and consultancy.

> *"We've got our own network and we've been developing a strategy, involving workshops agreeing what our measures are going to be and how we should all collect data in a consistent manner, using the same systems. Longer term, what we would do is pool the data for shared insights."*

➔ Swamp: Influence policy

Most of those we spoke to had not yet reached the point of using their data to influence change or policy. However, we did find 5 organisations working closely with local authorities and health partners to inform policy, practice and decision making. Sobus, in the data showcase for example, set out to demonstrate the prevalence of mental health issues in minority ethnic populations in Hammersmith & Fulham. They knew this was an issue locally and that they needed better analysis of local data in order to convince stakeholders to act. They created an authoritative report, which led to new investment in local mental health prevention and support services locally. The Southwark Travellers Action Group used their data to influence the New Southwark Plan (see this blog post). Others were sharing reports and learning with funders and commissioners to improve understanding of community needs.

The factors which make this successful warrant further exploration. Those we spoke to were clearly involved in a range of local forums and networks, allowing them to build relationships with key people from the local authority, funders, other charities and statutory bodies. This meant they could feed in to meetings regularly and use data to help make their case when change was needed. Those taking part in these meetings were confident in using data insights to make their case for change, even on a micro-level (such as specific points in a policy document).

> *"We use our data quite a lot for consultation responses, campaigning and trying to influence planning policy, housing policy, health policy. So we've got quite a few questions in our annual survey that are specifically around those sorts of areas. Then if we see a consultation coming up and we can push our campaign in that response, we've got the figures ready to put in."*

Bridges: What helps to influence change?

Bridge: Collaboration / Partnership

- Formal data sharing agreements
- Developing consistent data collection / reporting
- Creating or using open data standards
- Developing shared infrastructure and CRMs
- Making data insights accessible to partners
- Scope to identify shared / sector data challenges
- In-house dedicated data role with advanced data expertise
- Linking data roles between organisations

Bridge: Develop data expertise

- Senior leaders with detailed data knowledge
- Complementary internal roles to support sharing of insights
- A culture of publishing and sharing insights
- Building equal relationships with local decision makers
- Involvement in local / sector networks and forums to share insights
- Combining internal and external data sets for shared interest

> *"Data is persuasive and hard to ignore, especially when external experts are involved. When you publish a report about data, it gives your work legitimacy"*

Section 5

Better bridges

5.1 Responding to key data support needs

This report has presented a map of a small charity data journey and the various ways in which small charities get stuck. We have shared examples of small charities realising their ambitions to influence change with data. We have also outlined where charities face a range of barriers to simply getting started. We know there are some great support initiatives in the sector. We also found in this research that over three quarters of the participants felt able to move forward with data at some stage in their journey as a direct result of either the funding they had accessed for data work or data roles (particularly those with core funding), or because they had participated in a data support initiative. These included:

- Superhighways supports small charities and community organisations across London through advice, training and one to one support for digital, data and tech.
- Data Orchard helps organisations get better with data. Services include training courses, a Data Maturity Assessment Tool and a Nonprofit Datafolk Club.
- Datakind UK helps social change organisations use data science to have more of an impact, connecting them with some of the UK's best data scientists for free.
- Catalyst is a network helping the UK third sector grow its digital skills and processes, including data.
- The Data Collective, is a community of individuals who work in the UK social sector, and use or want to use data. They foster connections between people who may be facing similar data challenges, to share good practice, and help organisations to share their data with other organisations.
- Open data platforms configured for ease of use for non data experts and making data accessible to a wider audience e.g. 360Giving, London's Poverty Profile, and Impact on Urban Health's data pages.

Funders are also developing some great practice and recognising the need for sector data support. Superhighways has funding from City Bridge Foundation (for the Datawise London programme) as part of the Cornerstone Fund (supporting this research project), a funder collaborative, which includes a focus on using data to achieve better outcomes for Londoners. They also currently have funding from Trust for London's Stronger Voices programme, which supports micro charities and community groups to raise the voice of their communities to influence change. Other key examples we are aware of include:

- Lloyds Bank Foundation provides funder plus support through the Enhance Programme, including support to create robust systems and processes, as well as systematic monitoring and evaluation.
- The Clothworkers Foundation provides capital funding, including digital infrastructure
- The Legal Education Foundation and specifically the Justice Lab (now closed) has looked at the need for better use of data and research in the justice system.
- Those who access core funding (for example, from Esmee Fairbairn Foundation and the Tudor Trust) also found this particularly beneficial for their data journey.

Superhighways are now developing and testing new support ideas in response to the findings from this research. This includes convening spaces for peer learning and piloting a number of 'User Groups' for specific digital tools such as Power BI. These connect often isolated individuals in a small charity who are driving forward data use in their organisation. Superhighways have also been collaborating with funders, sharing insight to help them better understand data issues faced by small charities and as a specific example, inputting into guidance for capital funding opportunities for database systems. Finally Superhighways are looking at responding to more specific insights, such as the need to improve qualitative analysis skills and use of tools, or challenges around ethnicity and diversity monitoring, along with an ongoing broad range of practical data training for small charities.

We’ve heard a lot of positive feedback about the value this brings, but challenges still remain. We believe that there is scope to broaden access and increase the scale of the support available. Many small charities turned to local infrastructure organisations and sector specific networks (of organisations with a similar mission or focus) for support, before being signposted to data specific support. There are also opportunities to work collectively and potentially, develop new ways to provide access to skills, systems and tools to support small charities with data. Most importantly, small charities want to trust that they are choosing the right path on their data journey, safely exiting often inevitable swamps and making sound steps towards greater data maturity for the benefit of the communities they serve.

> *“I think when you're with a small organisation, it's quite isolating, genuinely, there's not a big training budget, if you ask your colleagues, they don't know, because you're the only one there really doing your job, then you're just left to your own devices struggling on. So when you discover something like Superhighways, you think ‘oh my goodness, it's not just me trying to work it out!’”*

> *“As much as charities want to do data analysis, their ability to capture data is still shackled, I would say, because the best tools aren’t available for free.”*

5.2 Moving forwards, how might we help?

The following 'how might we' statements highlight key opportunities to come together as a sector to better support small charity data journeys, based on the swamps, bridges and pathways identified in this report.

1. **How might we create capacity and headspace to plan data collection and analysis?**
    - How can we encourage and support the process of planning of data collection and analysis?
    - Could we increase access to desk space, administrative support, tools or tech?
    - Can we make it easier to identify and choose the right tools?
    - How can we make it less daunting when taking the first steps to collect data legally and ethically?
2. **How might we better support equitable and responsible approaches to data collection?**
    - Can we create capacity for data work to be co-designed or informed by communities they relate to?
    - Could peer learning or training help more small charities to explore this?
    - Can funders collaborate with funded groups to review demographic data collection?
    - How can we better support sociodemographic data collection, particularly ethnicity groups?
    - Could those who use secondary datasets be in a better position to influence how these are created?
3. **How might we improve the use of spreadsheets, qualitative data and secondary data in the sector?**
    - Could we scale training to improve spreadsheet and CRM based data analysis skills?
    - Can we support access to ad-hoc data expertise or practical capacity when needed?
    - How can we improve basic qualitative analysis for those with limited time/resources?

- Can we support more robust analysis for those undertaking substantive research projects?
- Could we find ways to reduce the cost and improve the accessibility of qualitative analysis tools?
- Can we make it easier to learn about sector and secondary datasets?
- Are there better ways to support those interrogating secondary datasets?
- Can we support small charities to understand the risks and use cases for new AI tools?

4. **How might we improve decision making, use and ownership of CRMs in the sector?**

- How might we support better decision making around whether to use or switch to a new CRM?
- Can we improve confidence to assess which CRM to choose and whether free options are viable?
- Could sector owned solutions or shared reporting functionality help?
- Could peer learning and support facilitate decision making around CRMs?
- Could peer learning drive the development of tools?
- Can we collaborate with technology providers to make systems more accessible and useful?

5. **How might we better design funding to support good data journeys?**

- Can we make project funding more data friendly? (e.g. time for data work, legacy funding for analysis)
- Could funding applications include essential data collection costs (tool subscriptions, desk space)?
- Could funding pay for specific data projects?
- Could funders cover the costs of core data roles or roles dedicated to data?
- Could funders provide data support directly, or by funding others to provide this?
- Could funding better support CRM use in the sector?
- Could funders support partnerships to develop collective approaches and infrastructure development?

6. **How might we enable CEOs and board members to develop data literacy and approach data strategically?**
   - Can we encourage more leaders to plan out their data journey?
   - Can we upskill leaders to better understand data terminology and practice?
   - Could we better support leaders to make informed decisions about budgeting for data tools, infrastructure, systems and roles?
7. **How might we encourage small charities to prioritise sharing their data and insights?**
   - Could we encourage more small charities to publish and share data or insights?
   - Can we support small charities to share their insights in creative and engaging formats?
   - Can we provide more training around how to communicate findings and share these effectively?
   - How can we foster, encourage and support a culture of sharing data and insights in the sector?
8. **How might we better celebrate and share good data practice to inspire others?**
   - Can we better connect often isolated data roles across multiple organisations?
   - Are there ways to better support collective data approaches to start and grow?
   - Can we better facilitate peer learning when working on a similar problem, tool, system or dataset?
   - Can we inspire others by sharing and celebrating micro-successes on data journeys?

Appendices

1. Collaborative journey mapping exercise

We created a journey mapping exercise, outlined below (see Figure 2 for an example) to ensure participants could tell us what mattered to them (rather than what we felt might be important). Discussion and comparing the maps also highlighted shared experiences. Anecdotal feedback suggests that participants valued reflecting on their progress with others. However, there were some limitations to this and we were mindful of this in our analysis:

- ➔ Relying on participants' memory, knowledge and history of working with data in the organisation. However, the maps gave a helpful overview of what was most memorable for charities and different journey timescales. Sharing experiences with peers also led to some adding to their map.
- ➔ Some participants may have been wary about sharing sensitive issues (such as challenges with data security, GDPR or working with their Trustees) in an open forum. We emphasised our informed consent process and maintained confidentiality. We also asked more about sensitive topics in interviews.
- ➔ Group discussions in each workshop differed. For example, one focused on data culture, another on qualitative data and shifting power. We prioritised these topics in analysis, as well as drawing on interviews.

> *"The ability to check in with people in similar situations is really quite nice and helps when you feel isolated on data too, to just feel part of a journey. So we're really keen to learn and bounce off each other. Thank you for today's session. I'm smiling again."*

Journey mapping exercise for online workshops

A ten minute solo exercise, adding colour coded post-it notes to a Google Jamboard. This is followed by a 15 minute small group discussion and feedback to a wider group. Participants can also revise their map.

Think of a roadmap. Add yellow post it-notes to show:

- ✔ How did you get to where you are now with your use of data?
- ✔ What were the key moments in your journey?

What were the key bridges? Add pink post it-notes to show:

- ✔ What helped you overcome challenges?
- ✔ What enabled you to progress?

What were the swamps? Add blue post it-notes to show:

- ✔ What traps did you fall into?
- ✔ What obstacles did you find on the way?

2. One to one interviews

One to one semi-structured interviews were undertaken to understand in-depth, what made small charity journeys difficult and what support helped. We quickly discovered journey mapping was ineffective in this context. It disrupted, rather than facilitated, the flow of conversation. The interview format was instead better suited to understanding the detailed context and circumstances of where an organisation is with data now, as well as what got them to this point. We created a structured interview based on workshop discussions, as well as topics covered by the Data Orchard Data Maturity Framework. Broadly, themes covered included:

- ➔ Current context: What their role involves, data work and projects in progress
- ➔ Capacity for data: Current projects, strengths and challenges, priorities, skills across other roles / team
- ➔ Motivations: What got you started, what helped and barriers?
- ➔ Funding: Has seeking or receiving funding influenced your data journey in any way?
- ➔ Upskilling: How have you and others in your organisation developed data skills and confidence?
- ➔ Tools: What do you use? Which ones did you look at? What did you choose and why?
- ➔ Safety and risk: What work have you done around GDPR and security?
- ➔ Leadership: How much interest/ challenge from your board / CEO? Does this help or hinder?
- ➔ Culture: How engaged are staff / volunteers? Do you try to change this?
- ➔ Support: Who/where do you turn to for help, support, ideas? What's missing?
- ➔ Connections and networks: Do you share your data and learning with others? How?
- ➔ Future: Ideal world, how would you move forwards? What does data mean to your organisation?

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- Bromley Third Sector Enterprise
- Carers UK
- Croydon Community Against Trafficking (CCAT)/Soul's Compass
- Centre for Armenian Information & Advice (CAIA)
- Coalition for Efficiency
- Community Action to Inspire Hope
- Croydon BME Forum
- Dipped In Creativity Engagement
- Dost Centre for Young Refugees and Migrants
- HEAR Equality and Human Rights Network
- Homestart Barnet, Brent, Harrow & Enfield
- Homestart Richmond, Hounslow & Kingston
- Human Unity
- Kentish Town Community Centre
- KINARAA
- Laamiga Women's Mentoring and Training
- Latin American Women's Rights Service (LAWRS)
- Law Centres Network
- Law for Life
- London Plus
- One Westminster
- One-Drum Foundation
- RMUK Food & Wellbeing
- Sobus
- Southwark Travellers Action Group (STAG)
- Speak Out in Hounslow
- Stepping Stone4 (SS4)
- Voluntary Action Camden
- Women's Health and Family Services
- Working Chance
- Young Barnet Foundation
- Young Brent Foundation

About us

Superhighways

Superhighways helps small charities and community groups gain essential digital and data skills backed by the right tech to achieve their goals.
Contact: info@superhighways.org.uk

Think Social Tech

Think Social Tech provides research and learning support in the social sector, with a passion for how organisations make best use of digital and data.
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