

## *Managing and Using Data for Program Success*

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# Why is Data Management Important?

- The proliferation of data is a common challenge for grantees
- Many grantees struggle with managing their data strategically and transforming that data into actionable information

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- Instead of having a strategic data management plan, some grantees overly rely on paper files, Excel spreadsheets, Access databases, and silos of data strewn throughout the agency

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- This approach leads to several problems:
  - Difficulty reconciling reports
  - Additional time required to provide stakeholders with information (and increased stress)
  - Difficulty clearly understanding participant outcomes and service delivery challenges
  - Confidential information is not adequately protected

# Why is Data Management Important?

*Objective of an effective data management strategy:*

To create data-driven work processes, focused on delivering participant-centered services with a continuous focus on project refinement.

# Why is Data Management Important?

- To help illustrate the importance of a well-planned data management strategy, we are going to walk through a couple of stylized case studies.
- Project A and Project B have two different approaches to their data management strategy. We'll take a closer look at how these differences impact their project's overall success.

# Choice of Data Management Tool

**Grantee A:** Receives its AFI grant, gives little thought to planning a data management strategy prior to grant award. Upon grant award, begins compiling paper records and multiple Excel spreadsheets.

**Grantee B:** As part of the application process, begins developing a strategic data management plan and includes a Management Information System (MIS) as the central part of its strategy. Upon grant award, is well positioned to begin implementing its strategy.

# Planning Data Collection

- **Grantee A:** Only collects information necessary to meet federal reporting requirements. Waits until the Annual Data Report is due in the first year of its grant to begin thinking about collecting information.
- **Grantee B:** Proactively designs a data collection plan that accounts for not only federal reporting requirements, but also information to help manage data for program performance. As part of the data collection plan, the grantee includes ambitious, yet achievable, targets and benchmarks throughout the life of its grant.

# Data Review

- *Grantee A*: Reviews data once a year, prior to submitting its Annual Report to Congress.
- *Grantee B*: Incorporates ongoing data review into their strategic data management plan. At a minimum, this grantee reviews project data weekly, but strives to review its data daily.

# Implications: Project Structure

**Grantee A:** Agency leadership struggles to understand project features that are successful and which ones need further improvement.

**Grantee B:** Is able to report real-time numbers about what's happening with the project. As a result, the grantee is in a much better position to generate reports to share with funders, policymakers, and participants. Because they have the ability to access up to date information, they can more comprehensively understand project features that are successful, as well as those in need of further improvement.

# Implications: Participant Outcomes

*Grantee A:* Project manager has to rely more on an anecdotal understanding of how well participants are completing the project.

*Grantee B:* Can rely on up to date, real-time data to quickly track individual participant outcomes, and use that information as a tool in case management to demonstrate participant progress.

# Implications: Project Credibility

**Grantee A:** Struggles to quickly and effectively measure participant outcomes. As a result, key stakeholders might question whether the project is meeting its potential.

**Grantee B:** Staff can rely on the MIS data to see improvements in participant outcomes because of their utilization of a data management strategy. Participants benefit from more efficient services because their data is stored and maintained in one central location. Staff are encouraged to use the data to provide feedback on what is and what is not working well, which helps improve service delivery to participants.

# Implications: Daily Operations

**Grantee A:** Staff is limited in its capacity to understand how service delivery can be improved. Efforts to do so are inconsistent and still do not address underlying drivers.

**Grantee B:** Implements its MIS into daily operations, increasing staff support and an understanding of how to continually improve service delivery. The grantee utilizes innovative data management practices that translate data to tell a story.

# Live Demo: AFI Online Data Collection Tool

# Question and Answer

**Have data management questions?**

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