



PROGRESSIVE TECHNOLOGY PROJECT

Importance of Data & Good Data Practices

HARNESSING THE POWER OF DATA

a case study



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NOLOGY PROJECT





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Book2 - Microsoft Excel

Thomson Financial

Tools Options Calculation Lookup Reports Wizards Help

A23

	A	B	C	D	E	F	G	H	I
1	Entity Name:	Key:	Currency:		Y2009	Y2008	Y2007	Y2006	Y2005
2	BP PLC	C000017178	GBP	WS.PrimarySICCode	2911				
3				WS.FiscalYearEndDate	31-Dec-2009				
4				WS.TotalAssets	147,157.500	156,343.030	118,982.304	111,194.111	120,423.948
5				WS.TotalDebt	21,641.875	22,744.740	15,646.680	12,269.110	11,152.284
6				WS.LTDebtPctTotalCapital	19.994	15.938	14.189	11.482	11.242
7	Glaxosmithkline PLC	C000017224	GBP	WS.PrimarySICCode	2834				
8	Glaxosmithkline PLC	C000017224	GBP	WS.FiscalYearEndDate	31-Dec-2009				
9				WS.TotalAssets	40,488.000	36,633.000	28,807.000	23,430.000	24,984.000
10				WS.TotalDebt	16,257.000	16,187.000	10,571.000	5,490.000	6,471.000
11				WS.LTDebtPctTotalCapital	57.921	64.678	41.627	33.093	41.048
12	Deutsche Bank AG	C000007870	EUR	WS.PrimarySICCode	6211				
13				WS.FiscalYearEndDate	31-Dec-2009				
14	Deutsche Bank AG	C000007870	EUR	WS.TotalAssets	1,493,514.000	2,193,953.000	2,015,577.000	1,122,587.000	987,961.000
15				WS.TotalDebt	309,837.000	347,820.000	605,997.000	339,417.000	277,627.000
16	Currency: Native			WS.LTDebtPctTotalCapital	79.183	82.135	81.155	77.642	76.724
17	Scaling Factor: Millions								
18	Note: Scaling does not apply to Price(hi, low, close)								
19	Source: ThomsonFinancial								
20									
21									
22									

Sheet1 Sheet2 Sheet3

Ready



VOCAL's organizational culture became data oriented

CiviCRM Home | CiviCRM 3.0 Demo Site - Mozilla Firefox

File Edit View History Bookmarks Tools Help

http://drupal.demo.civicrm.org/civicrm/dashboard

CiviCRM Home | CiviCRM 3.0 Demo Site

Home Search... Contacts Contributions Events Mailings Memberships Reports Other Administer Help Logout

Recent Items

Mr test 14 User

- create new -

New Individual

First Name:

Last Name:

Email:

Save

My Contact Dashboard

Upcoming Events

Testing an Paid Event
November 16th, 2009
Some kind of Event

Dave's Test
November 18th, 2009
This is a test event

CiviCRM Home

Activities

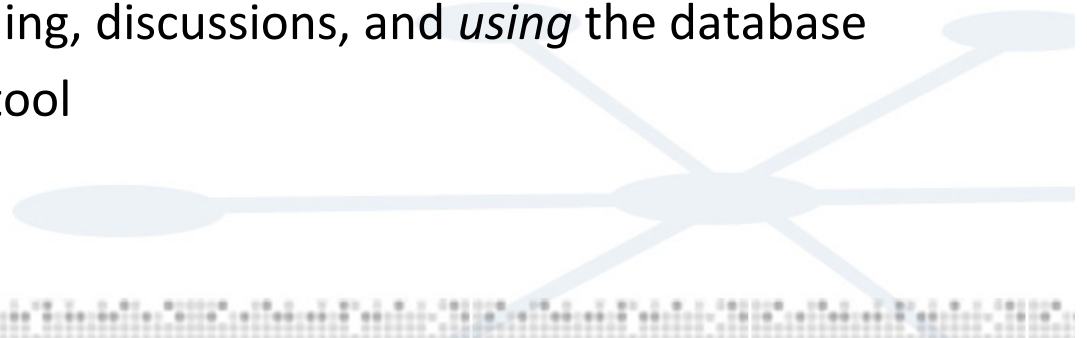
Type	Subject	Added By	With	Assigned To	Date	Status	
Phone Call		User, test 14	Adams, Anne	Demouser, Jane	November 11th, 2009 4:28 AM	Scheduled	View Edit Delete
Interview	hntjtyj	User, test 14	Adams, Bernard	Adams, Bernard	November 12th, 2009 3:46 AM	Scheduled	View Edit Delete
Meeting	access	Demouser, Jane	mauriciorucci@gmail.com	Jameson, Chris	November 12th, 2009 6:25 AM	Scheduled	View Edit Delete
Phone Call		User, test 14			November 12th, 2009 8:25 AM	Scheduled	View Edit Delete
Phone Call		User, test 14			November 12th, 2009 8:28 AM	Scheduled	View Edit Delete
Meeting	Meeting after interview	User, test 14	saleh, parvez		November 13th, 2009 3:09 PM	Scheduled	View Edit Delete
Meeting	fare test	decox, Massimiliano	decox, Massimiliano	decox, Massimiliano	November 13th, 2009 5:10 PM	Scheduled	View Edit Delete
Meeting		Jameson, Chris	Jameson, Chris	Adams, Bernard	November 13th, 2009 9:35 PM	Scheduled	View Edit Delete
Interview	call them to arrange2	User, test 14	Adams, Anne		November 14th, 2009 4:30 AM	Scheduled	View Edit Delete
Interview	new activity	Pat Yadav's home	saleh, parvez		November 14th, 2009 3:06 PM	Scheduled	View Edit Delete
Acquire		User, test 14			November 19th, 2009 12:46 AM	Scheduled	View Edit Delete
Interview	Foo bar	User, test 14		Adams, Richard	November 20th, 2009 1:12 AM	Scheduled	View Edit Delete

Done

3 Key Things:

Key to harnessing power of data is ALL THREE of these things:

- **Data**
 - what's the information you want to collect and track and why
- **Place to Keep Your Data -- the "container"**
 - lists on paper, spreadsheet program, database
- **Use**
 - An internal culture of training, discussions, and *using* the database
 - More important than the tool
 - It's gotta **work** for you!



Data You Should *Routinely* Collect (Suggested List)

- first/last name
- email
- home address
- primary phone number
- phone number(s)
 - Landline
 - Work
 - Cell
- preferred contact method
- do you text?
- do you change cell # frequently?
- preferred language
- issue interests
- demographic data
 - i.e. gender, neighborhood, race/ethnicity, country/origin
- Social media usage
 - Twitter (yes/no), Facebook (yes/no)
- way to categorize contacts
 - i.e. donor, member, prospect, volunteer
- history of involvement with your organization (donations, events, etc.)
- how they entered org
- org affiliation

Lessons Learned

1. Be thoughtful about information you want to collect. What and why?
2. Need cross-organizational, ongoing discussions about this. This is how your use and understanding (and work!) evolves.
3. Staff needs ongoing training on data *collection*, data *entry*, and data *use*.
4. Staff needs to *use* the database.
5. Someone who has *ownership* over your database.





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An Integrated Approach to Fundraising is Driven By...

Having a clear sense of best data practices!





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