



Data Collection Protocol Introduction

1. Purpose & Definitions

Problem Definition (internal).



North Arrow's goal is to allow your organisation to reclaim control on your produced and collected data, that we believe to be essential for communication and strategy. We want to help you with historical data (**downstream**), to enrich it and improve its archives, and with future data (**upstream**), to make sure you make all activation scenarios possible.

Downstream - Audit existing data & improve quality

Upstream - Improve future data quality

But first, what are we talking about?

Data Types

Data comes in all shapes and sizes (like us!), and different shapes and sizes need to be treated differently (unlike us!). Here's a simple typology of data types we cover.

- Qualitative data: contacts, locations, event descriptions, press coverage content
example: a list of events you organised and their parameters

Event Name	Location	Program	Date	Number of attendees	Attendee Type
Bethpage Summer Camp	Bethpage	Youth Camp	01/07/2021	89	Students
John F. Kennedy Middle School	Bethpage	School Talk	2022	12	Students
Walk against police brutality	Bethpage	Direct Action	2022	98	Volunteers




- Quantitative data : performance indicators that quantify your work/impact and show the health of the communities you are serving or the problems you are addressing
example: a year by year table with the reach of your work

Quarter	Year	Number of families served
Q4	2021	234
Q1	2022	323
Q2	2022	182


- **Multi-media data** : photos, videos, soundbites, illustrations, press-clips
eg: a gallery of pictures to the latest amazing fundraiser you threw, amongst which *012022_FundraiserGala_02.jpg* = picture taken at the January 2022 Fundraiser Gala, #2 of a collection

Data Sources

What produces the data that we are seeking to organise?

-  The tools that you use daily are great sources of data.
-  The people that work, volunteer, organise with you are great sources of data too.
-  The reports you produce regularly

The tools

 The tools you use collect and archive data. Auditing & accessing this data is a key step in understanding how we can leverage it.

- **Contacts & Donors Management Systems**

The tools that you use to manage, enrich and activate the members of your community is a great source of data. The members your community can be

- The people you help : families served, youth mentored, grantees etc.
- The people that help you : staff, volunteers, board members, donors, co-speakers at an event, mentors

Running analysis and building visualisation on the breadth of your support ecosystem can be an amazing source of insights and a great way to show impact.

But first, these listing of key people need to be organised, clean, accessible, exportable

example of popular tools you may use: Mailchimp, Bloomerang, Flipcause, DonorPerfect, Network for Good, Kindful, OneCause, Salsa Labs

- **Event Management Tools**

The tools you use to organise great gatherings, events, or to list the events you've thrown before. It can be a Facebook Group, a Slack or an email thread, a good ol' Excel spreadsheet.

It can be more corporate tools like Eventbrite, Whova, Boomset, Lumaverse, WildApricot, Avenry, Accelevents, Doubleknot, CharityEngine, Cvent

Getting access to these events and knowing how to export/use the data the collect is key!

- **Social Networks & CMS / Website Analytics Tools**

You spend a lot of working on that beautiful website of yours, and hire someone to craft a rock-solid social media communication strategy. But do you properly track the performance of these different assets?

- social medias are great sources of data to collect engagement metrics like audience, shares, views. These include the popular Facebook, Instagram & Twitter
- CMS / website analytics also provide generous insights on the usage of your website with traffic, engagement, document download, event signup metrics
These include Google Analytics, Wordpress, Webflow, Wix, Squarespace, Hub CMS

- **Other tools**

Any software you use on a day to day basis to organise are source of usable data

- your own project management tools, accounting spreadsheets, donor management files, physical folders
- fundraising & crowdfunding tools : Fundly, Qgiv, Snowball, Allegiance
- prospect research : DonorSearch
- political tools : Grassroot Unwired
- board management : Boardable



The people



The people you work and organise with can collect data in great and valuable ways. But they need the proper guidelines and clear responsibilities in order to do it properly

- **Event data** : you organise impactful events for your community, or to advance your cause. Document them. The people of the ground are the only ones that will be able to gather media that will be key to 1/ reporting on the performance 2/ communicate on that success & 3/ build better events. We know resources are scarce and time precious, but taking these extra steps the insure that an event is well covered:
 - Appoint someone to take pictures, records videos
 - Record attendance (even if rough estimates)
 - Collect citations, quotes
 - Write a quick event report

- Gather all of the collected media in the same cloud location (we will show you how!)
- Keep a coherent way of naming, recording and collecting data about your events
- **Program data:** you build and roll out great programs in the fights that you fight. How these program evolve and grow (or decrease!) overtime is key to understand the health of these key parts of your action as non-profits.
If you do not have clearly identified Program Leads, it's a great idea to appoint someone in charge of documenting these programs regularly. We will show you how too.

The reports



You produce regular reports to guide your strategy or communicate on your action. The data sources listed above are essential to be able to write efficient reports, and these reports themselves can be great sources of synthesised information.

- Quarterly / Semesterly / Annual Reports: usually shared with you support network, existing or potential donors and supporters, these regular reports try to demonstrate the situation at hand, the work that has been accomplished, the roadmap for what's to come.
- Communications to your board where you sum up the best of your actions and the challenges you need help on solving
- Ad hoc analyses and research reports that can have multiple objectives
 - assess the situation of communities your serving, deep-dive on a specific issue
 - assess the impact of your action
 - explore overlapping issues
 - map the extent of the problem
 - draw synergies between issues and show potential bridges between fights

The data created by these reports, the fruit of long research and dedicated on the ground data collection can be key to communicate the impact of your work.

2. How do we help ?

Our process is thorough and aims at not leaving any stones unturned!

Step **1** - Existing Data Audit

Compulsory to us helping your non-profit, the audit phase is one of the most important phases of our engagement with you.

1. We interview(s) the key stakeholders of the organisation to understand what data is available and where
Details: an hour-long live conversation with a scripted set of questions to identify data collection scenarios, tools, and the individuals responsible for them
@Charles Groperrin to create audit questions
2. You grant us access to the tools that you use (under NDA protection!) and we compliment the high level interview answers with what we see and deem we can use
Details: we go deep in each of the identified tools, reports, folders
@Charles Groperrin to adapt templated NDA
3. We provide you with a document that maps, defines and qualifies the data at your disposal, as well as highlights where there are flaws
Details: we make a diagnostic

Step **2** - Data Re-organisation & New Protocol Implementation

The second step isn't compulsory but recommended

1. We take the data that we found and documented, and we suggest a way to re-organise, re-name, and re-purpose the data at your disposal
2. Upon agreement, we implement these changes for you and deliver a new way of organising data & content, that comes with:
 - a. a **Cloud Data Repository** (Google Drive / Dropbox) or other depending on your preferences, pre-filled with a clear structures of folders, access rights, and when possible, automation with your existing tools
@Charles Groperrin to create an example structure
 - b. a **clear set of naming conventions** and formats to archive all future content
 - c. a **clear set of responsibilities** for specific individuals in the organisation, or the appointment of a data quality officer in your team
 - d. a **live training** to relevant team members and stakeholders to present the new system
 - e. a set of **guidelines** to be shared with new staff and volunteers with best practices & use cases
@Charles Groperrin to create guidelines doc