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SEA Business Plan Implementation Knowledge Sharing Session

July 27, 2022

Our Team

Sarah Eisele-Dyrli

Assistant Director

David Nee

Board Chair

Michelle Riordan-Nold

Executive Director

Our Mission

Striving for **informed decision-making** across Connecticut, we empower an ecosystem of data users by **democratizing access to public data** and **building data literacy**.

Our Earned Income Venture

A unique capacity-building initiative for foundations and philanthropic organizations to help their grantees become stronger and thrive more.

- Provides training and coaching to help nonprofits build Data Strategic Plans.
- Helps nonprofits align their data with their mission to learn whether they are reaching their goals.
- Helps nonprofits move from collecting data in an *ad hoc* manner to being proactive and systematic, and approaching data with strategic purpose.

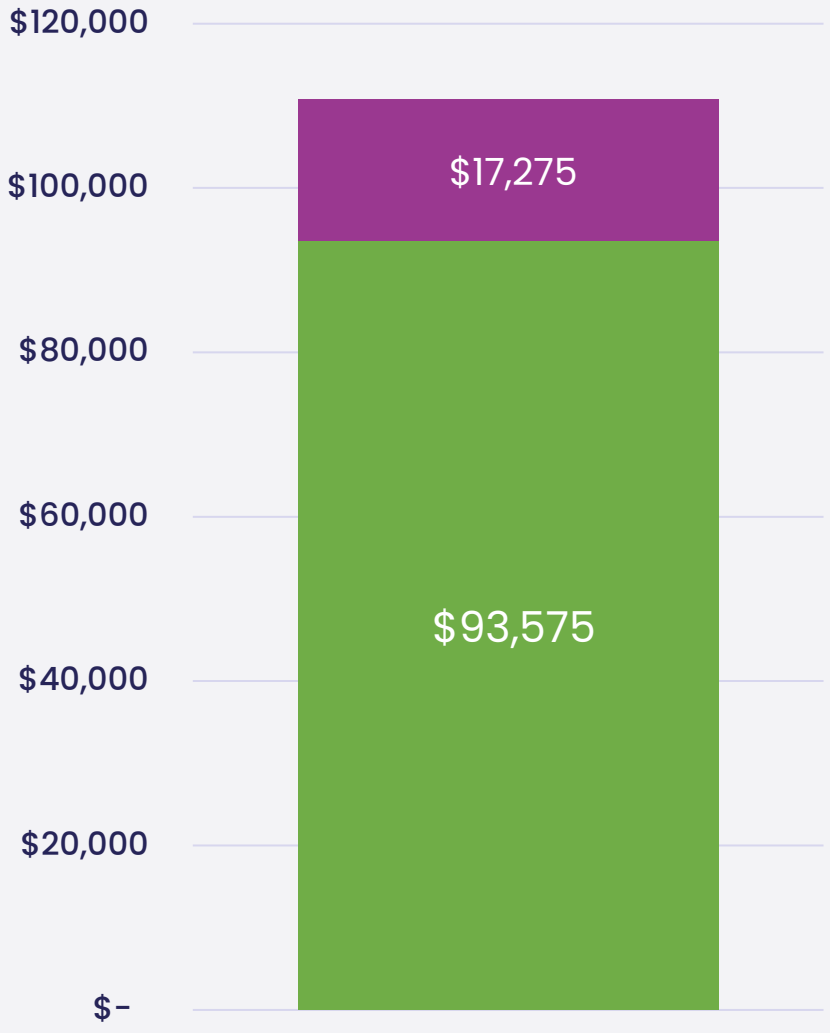
Our Business Plan Implementation Focus

- Startup capital raise
- Conducting the pilot
- Marketing & communications
- Business development and sales
- Building our team

Startup Capital Raise

We've raised 84% of our targeted investment funding with $17,275 to go.

As of July 15, 2022



CTData Strategic Planning Pilot

Building the plane while flying it

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Pilot Recruitment

Recruitment demonstrated demand

Hartford Foundation for Public Giving staff shared information with grantees seeking 5 nonprofits.

Within 48 hours, we had 14 nonprofits interested in participating in the pilot.

With 20 nonprofits signing up to join the info sessions, we cut off recruitment.

Shows the great need for this service

Data Strategic Planning Pilot

From April to August, 2022

Started with have 12 nonprofits in the pilot with 8 remaining.

CTData is evaluating, learning, and adapting the service

Similar to SEA, it is a mix of 5 labinars, homework, with 3 consultations.

Participant Organizations

Connecticut Forest & Park Association

The Connecticut Forum

FOCUS Center for Autism

Hartford's Camp Courant

hvcc 1970-2020 50th Anniversary

iea Intensive Education Academy

the iquilt partnership

Talcott Mountain Science Center

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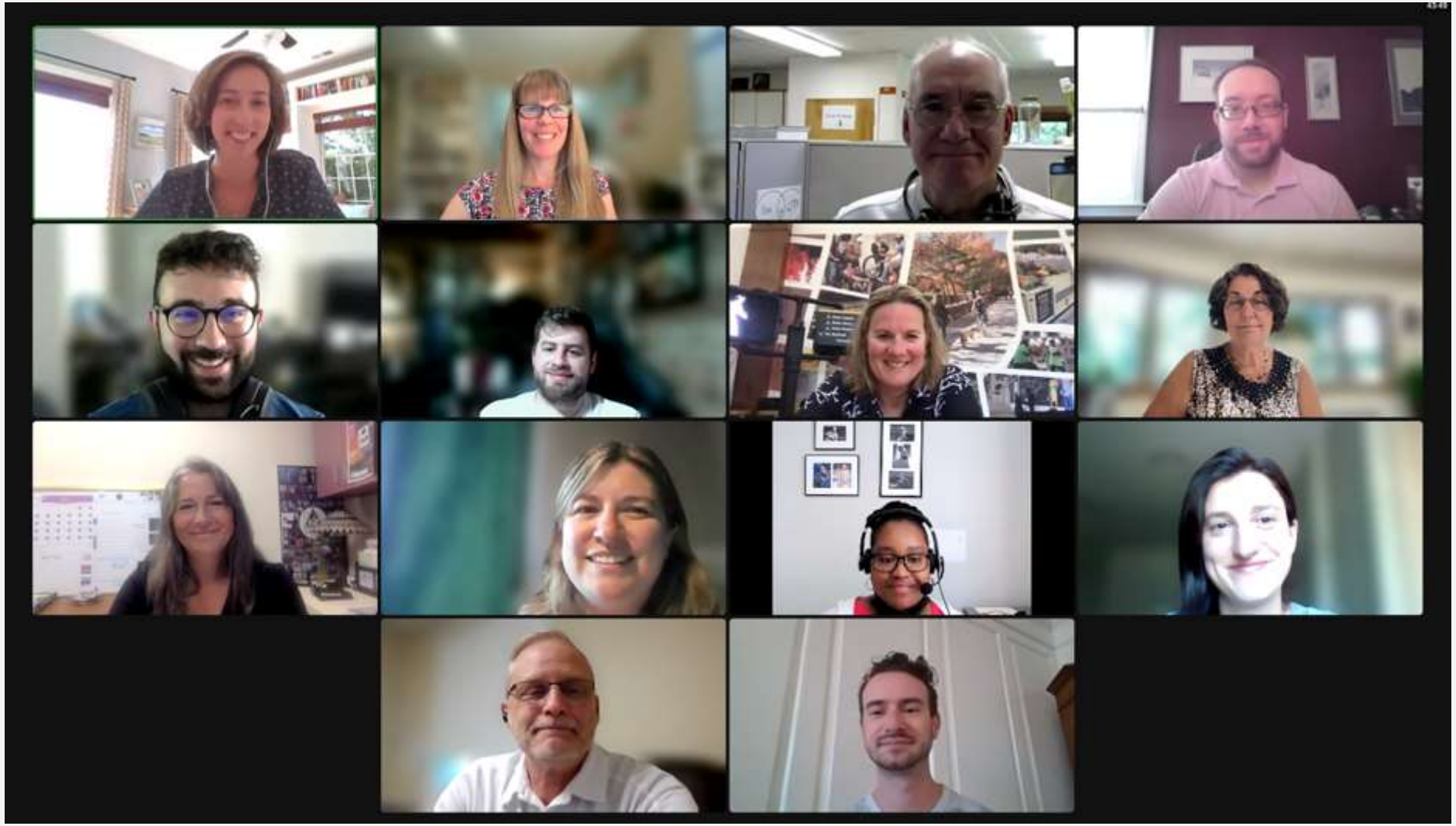
Pilot Phase I Cohort



4

Labinar sessions so far

25

Mini-consultations in total so far

Source: Essential Equality: Women, COVID-19 and Rebuilding CT.

David O’Rourke

CEO

Hockanum Valley Community Council

> Sarah and Michelle have a passion for data collection, evaluation and outcomes and they have shared their knowledge in a way that can be easily understood and implemented….We look forward to working with CTData in the future.

Because of pilot, we have developed…

Materials

Agendas, workbooks, homework files, PowerPoints

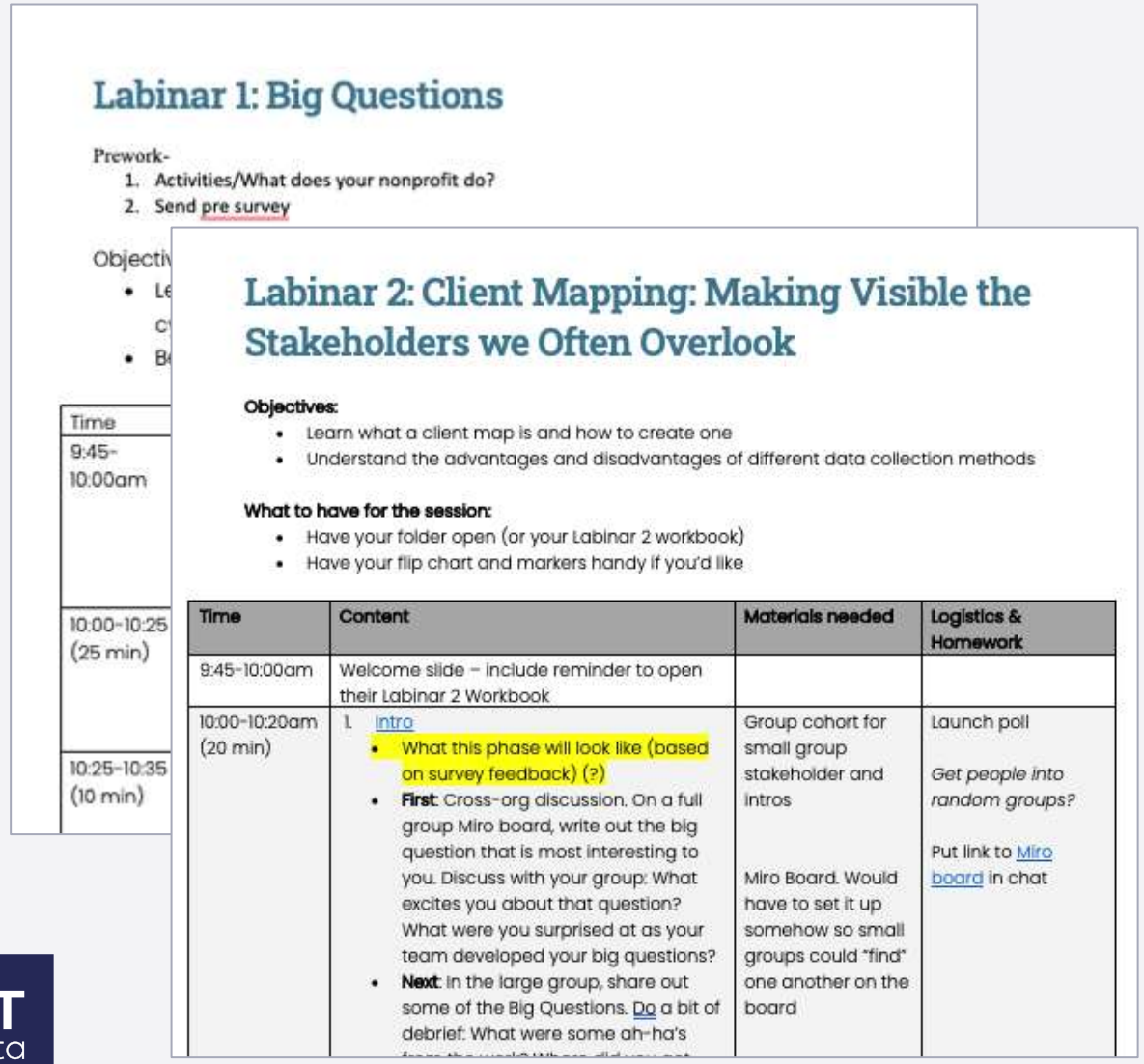
Workflow & Communications

Project plan, email text

Website

Cohort password-protected website

Materials: Agendas



Labinar 1: Big Questions

Prework-

1. Activities/What does your nonprofit do?
2. Send pre survey

Objecti

- Le
- Be

Time
9:45-10:00am
10:00-10:25 (25 min)
10:25-10:35 (10 min)

Labinar 2: Client Mapping: Making Visible the Stakeholders we Often Overlook

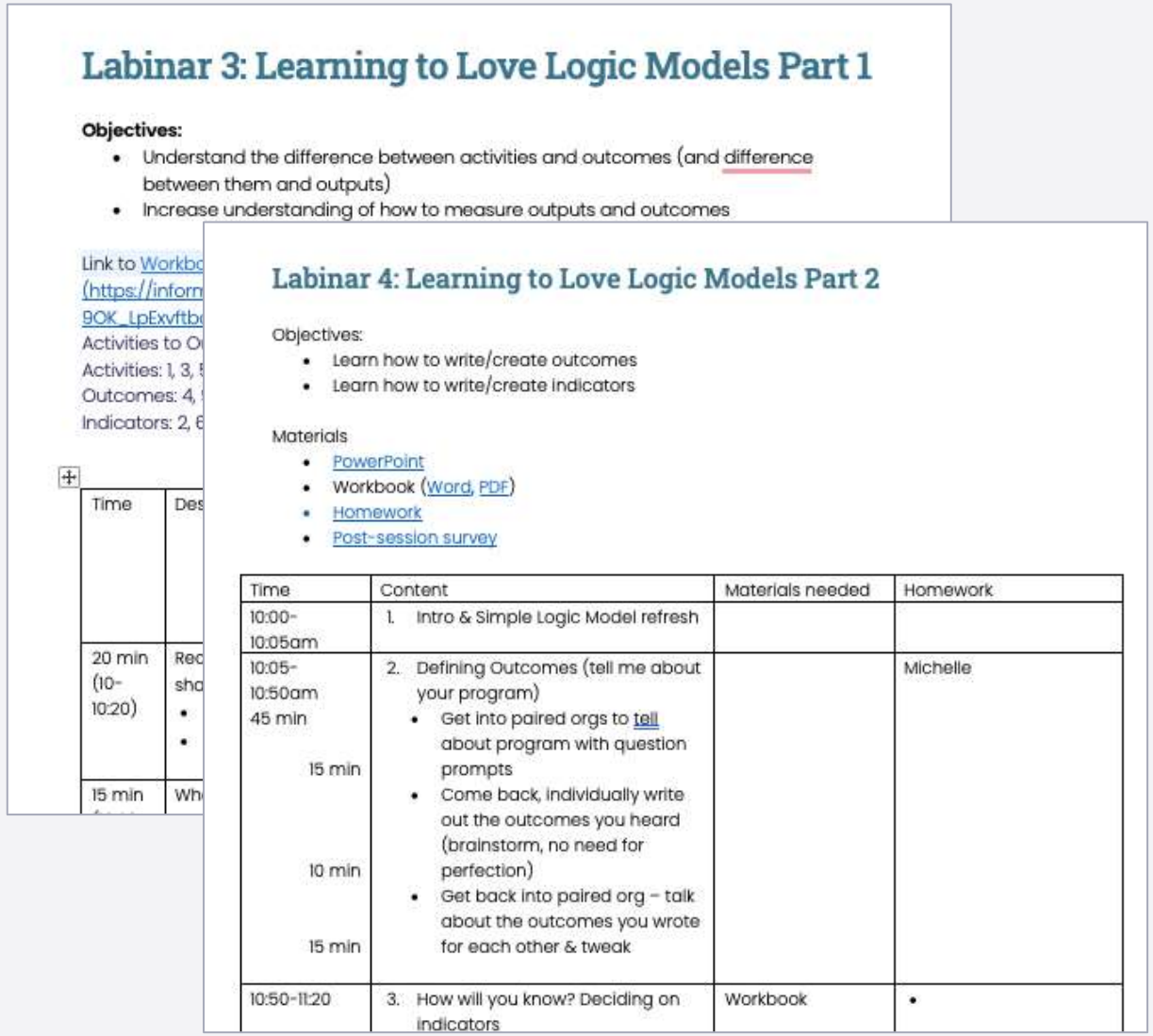
Objectives:

- Learn what a client map is and how to create one
- Understand the advantages and disadvantages of different data collection methods

What to have for the session:

- Have your folder open (or your Labinar 2 workbook)
- Have your flip chart and markers handy if you'd like

Time	Content	Materials needed	Logistics & Homework
9:45-10:00am	Welcome slide – include reminder to open their Labinar 2 Workbook		
10:00-10:20am (20 min)	1. Intro • What this phase will look like (based on survey feedback) (?) • **First**: Cross-org discussion. On a full group Miro board, write out the big question that is most interesting to you. Discuss with your group: What excites you about that question? What were you surprised at as your team developed your big questions? • **Next**: In the large group, share out some of the Big Questions. Do a bit of debrief: What were some ah-ha's	Group cohort for small group stakeholder and intros Miro Board. Would have to set it up somehow so small groups could "find" one another on the board	Launch poll *Get people into random groups?* Put link to Miro board in chat



Labinar 3: Learning to Love Logic Models Part 1

Objectives:

- Understand the difference between activities and outcomes (and difference between them and outputs)
- Increase understanding of how to measure outputs and outcomes

Link to Workbo
(https://inform
9OK_LpExvftb
Activities to O
Activities: 1, 3,
Outcomes: 4,
Indicators: 2, 6

Time	Des
20 min (10-10:20)	Rec sha • •
15 min	Wh

Labinar 4: Learning to Love Logic Models Part 2

Objectives:

- Learn how to write/create outcomes
- Learn how to write/create indicators

Materials

- PowerPoint
- Workbook (Word, PDF)
- Homework
- Post-session survey

Time	Content	Materials needed	Homework
10:00-10:05am	1. Intro & Simple Logic Model refresh		
10:05-10:50am 45 min 15 min 10 min 15 min	2. Defining Outcomes (tell me about your program) • Get into paired orgs to tell about program with question prompts • Come back, individually write out the outcomes you heard (brainstorm, no need for perfection) • Get back into paired org – talk about the outcomes you wrote for each other & tweak		Michelle
10:50-11:20	3. How will you know? Deciding on indicators	Workbook	•

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Materials: PowerPoints

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Materials: Workbooks

Labinar 3 Workbook

Why You Will Learn to Love Logic Models

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Logic Model Lingo

Adapted from Developing a Logic Model: Teaching and Training Guide

Instructions: Put a check in the appropriate column for each item.

	What we do (Activities)	What we achieve (Outcomes)	How We Know (Indicators)
1. Run methadone clinic			
2. # of new/repeat donors			
3. Provide Support groups to young adults with autism and to their families			
4. Increase cultural vitality in Greater Hartford			
5. Provide a Year-round teen leadership program			
6. # of legislators using our language in bills or testimony			
7. Run weekend STEM programs			
8. % of students who are more excited about STEM than before the program			
9. Improve the quality of life for residents of Connecticut			
10. % of participants of different demographics			
11. Engage communities in creative placemaking			
12. # of students who improve skills in specific areas			
13. # of youth who are assessed over time			
14. Increase leadership skills among youth with physical and cognitive disabilities			
15. Foster relationships & engagement among sponsors			

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Labinar 4 Workbook

Why You Will Learn to Love Logic Models, Part 2

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Tell Me About Your Organization

Adapted from Developing a Logic Model: Teaching and Training Guide

In your paired organization breakout groups, choose one group to be the question asker first, and the other to answer the questions. When your organization is the asker, ask the other team these questions. Write out notes so that you can write the outcomes you hear in the next section of the activity.

Part A: Ask these questions or similar

1. Tell us about your organization? What does your organization do?

2. Why does your organization exist? What would be missing in your community or in the state if you didn't exist?

3. What changes do you hope to see in people's lives because you exist?

4. How would you know that your organization has fulfilled its mission?

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Materials: Homework

Big Questions Template

Instructions: Starting with your list of activities, fill out each box first, then put the ideas together into a cohesive question. You may either work on this individually then come together as a group to share your ideas, or work on this all together.

Activity or Topic What are you trying to learn about? • Program • Service • Strategy • Outcome	Who? Who is impacted by your topic? • Clients • An age group • Residents	Aspect What aspects of the topic do you want to learn about? • Improving • Successful • Cost-effective	Timeframe What is the timeframe you're looking at? • 2021 • 2017 to 2022 • 2020 to 2025	Where? What is the geographic location? • City • Neighborhood • State
Put it all together:				
Put it all together:				

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List of Data Collection Tools

Once you have created your client maps, you can begin to compile your data collection tools. In the following pages, pull the names of the data collection tools from each of your client maps and list them here. Make note of the kind of tool it is (intake form, website analytics, survey, etc). Begin writing descriptions of those tools (which will ultimately be added to your Data Strategic Plan).

Tool (Data Collection Method)
Description (option: what are some of the advantages and disadvantages)

Example:
CTData Academy Post-Session Training Survey (Paper Survey)
Survey administered to participants at the end of CTData Academy workshops. Collects primarily closed-ended items about training quality and knowledge gained in relation to learning objectives. Advantages: When collected in person, get 100% response rate. Provides actionable insights into how workshops can be improved. Disadvantages: Because data is primarily closed-ended, we're not able to learn specifics about what exactly should be changed about each activity, or what specifically went well about each activity. When collected virtually, get less than 30% response rate.

Tool #1:
Type of collection tool:
Description:

Tool #2:
Type of collection tool:
Description:

Tool #3:
Type of collection tool:
Description:

Striving for informed decision making across Connecticut, we empower an ecosystem of data users by democratizing access to public data and building data literacy.
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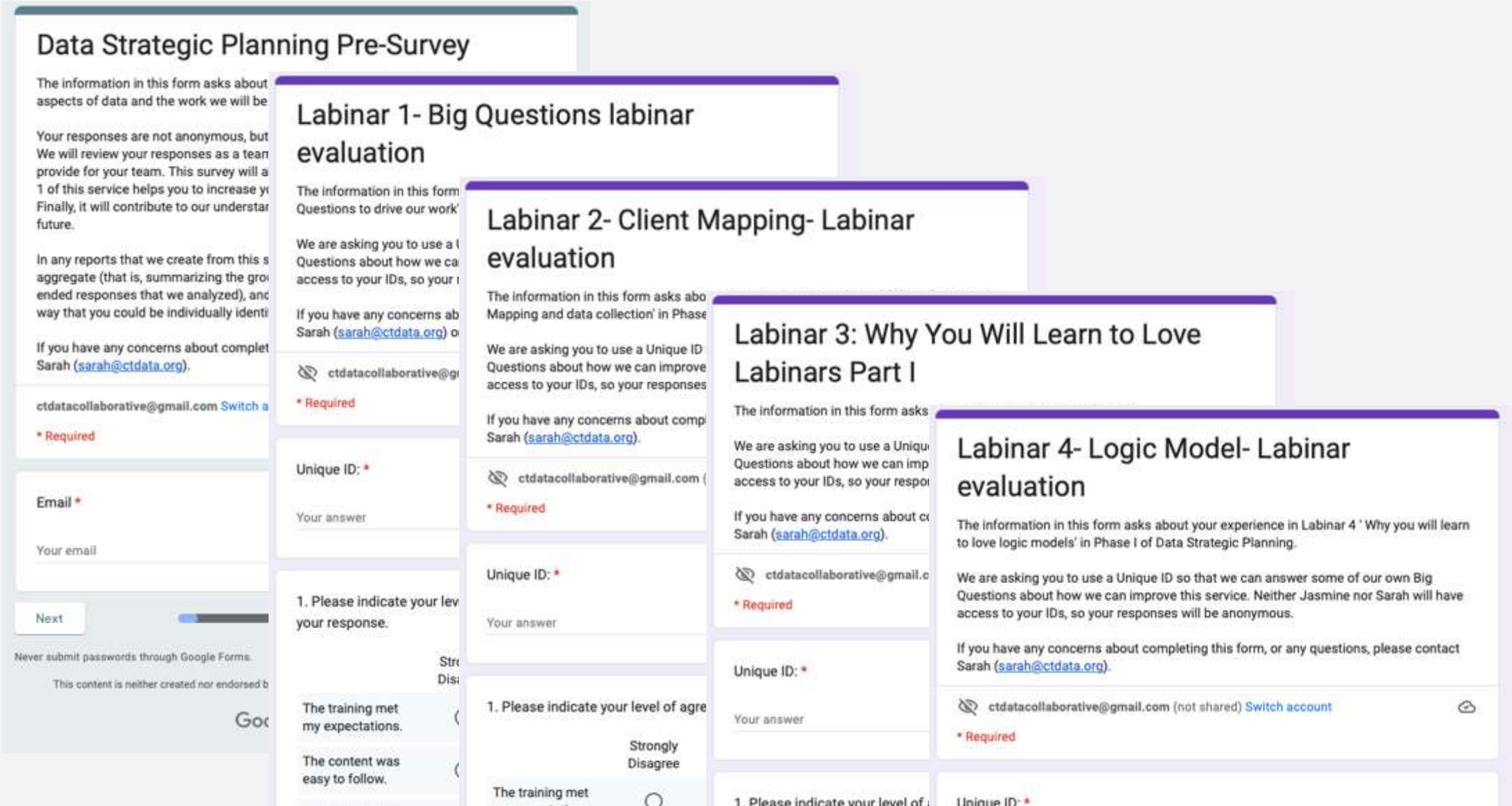
Materials: Surveys



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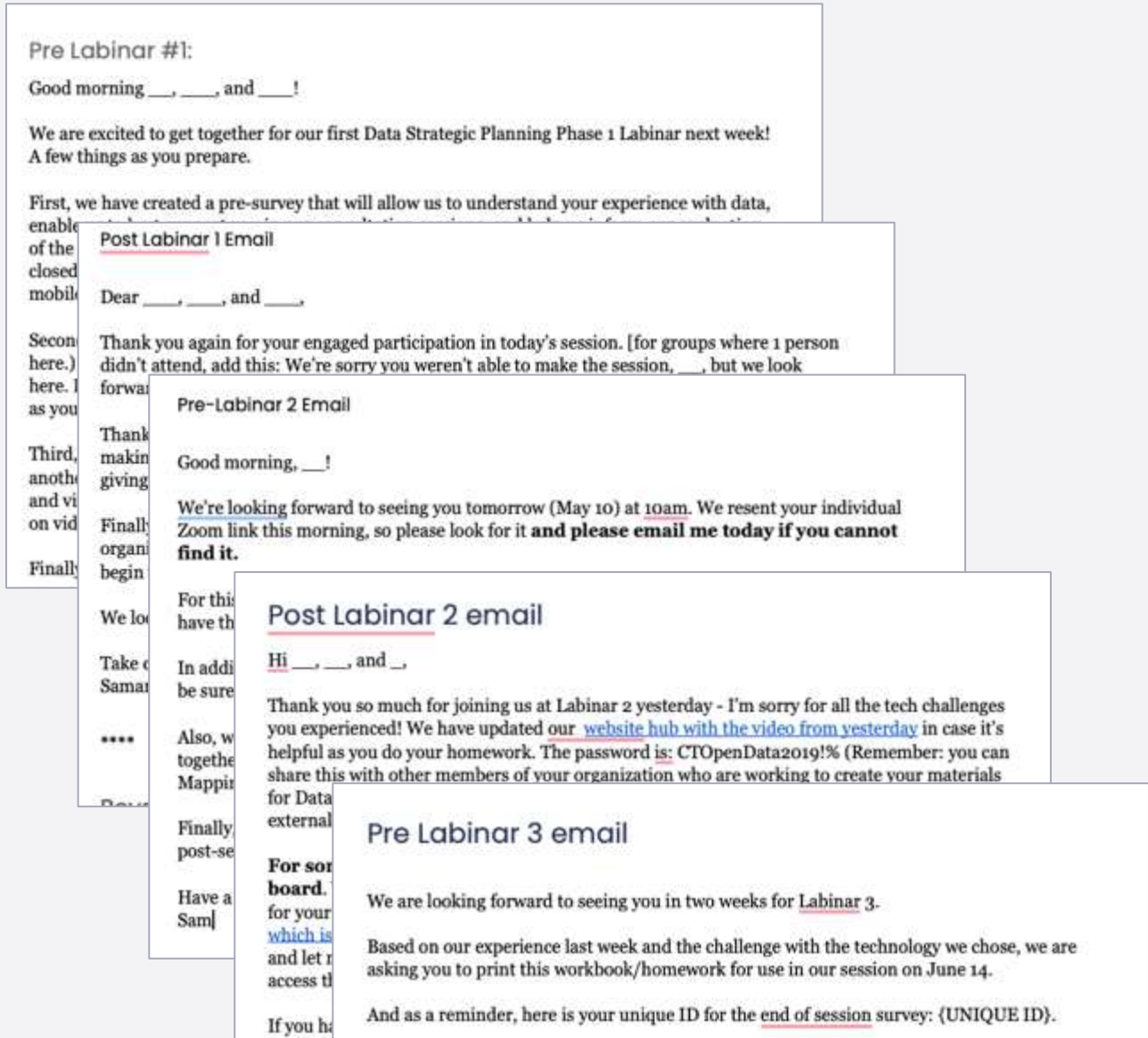
Workflow & Communications

DATA STRATEGIC PLANNING COHORT TASKS

Keep?	STATUS	DEADLINE	PROJECT TASK	ASSIGNED TO	Notes
			Prepare for Intro Session		
Yes	Complete		Get participants signed up for info session		
Update	Complete		Create agenda & slides for session		Need to update
Done	Complete		Create application		
Yes	Complete		Send application		
Yes	Complete		Review apps & decide who to invite to participate		
			Prepare for for Labinars		
Yes	Complete		Write & send email to participating organizations. Send first to 2 with schedule conflict. Then check on April 12 or 14 incl. link to first consultation sign-up.	Sam (thru Sarah)	
Yes	Complete		Set up recurring zoom meeting and register each participant. Send individual links for Labinars	Sam (thru Sarah)	
?	Complete		Duplicate pre-work Doc to be in each folder	Sam (thru Sarah)	Will we keep pre-work?
Yes	Complete		Assign unique IDs	Sam (thru Sarah)	
Yes	Complete		Send first email with unique ID's and link to the pre-survey	Sam (thru Sarah)	
			Prepare for consultations	Timing?	



Pre Labinar #1:

Good morning ___, ____, and ____!

We are excited to get together for our first Data Strategic Planning Phase 1 Labinar next week!
A few things as you prepare.

First, we have created a pre-survey that will allow us to understand your experience with data,

Post Labinar 1 Email

Dear ____, ____, and ____,

Thank you again for your engaged participation in today's session. [for groups where 1 person didn't attend, add this: We're sorry you weren't able to make the session, ___, but we look

Pre-Labinar 2 Email

Good morning, ___!

We're looking forward to seeing you tomorrow (May 10) at 10am. We resent your individual Zoom link this morning, so please look for it **and please email me today if you cannot find it.**

Post Labinar 2 email

Hi ___, ___, and _,

Thank you so much for joining us at Labinar 2 yesterday - I'm sorry for all the tech challenges you experienced! We have updated our website hub with the video from yesterday in case it's helpful as you do your homework. The password is: CTOpenData2019!% (Remember: you can share this with other members of your organization who are working to create your materials

Pre Labinar 3 email

We are looking forward to seeing you in two weeks for Labinar 3.

Based on our experience last week and the challenge with the technology we chose, we are asking you to print this workbook/homework for use in our session on June 14.

And as a reminder, here is your unique ID for the end of session survey: {UNIQUE ID}.

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Website

Data Strategic Planning: Cohort 1

Welcome to the Data Strategic Plannign Cohor 1 information hub! This page, which will be populated as we to through Phase 1 of Data Strategic Planning, includes videos of our session, and will include additional links or resources as we go.

This information is only for you as a member of an organization that is part of Data Strategic Planning. Please do not share this with anyone outside of your organization.

SESSION VIDEOS | RESOURCE LINKS | UPCOMING SESSIONS

Videos

LABINAR 3

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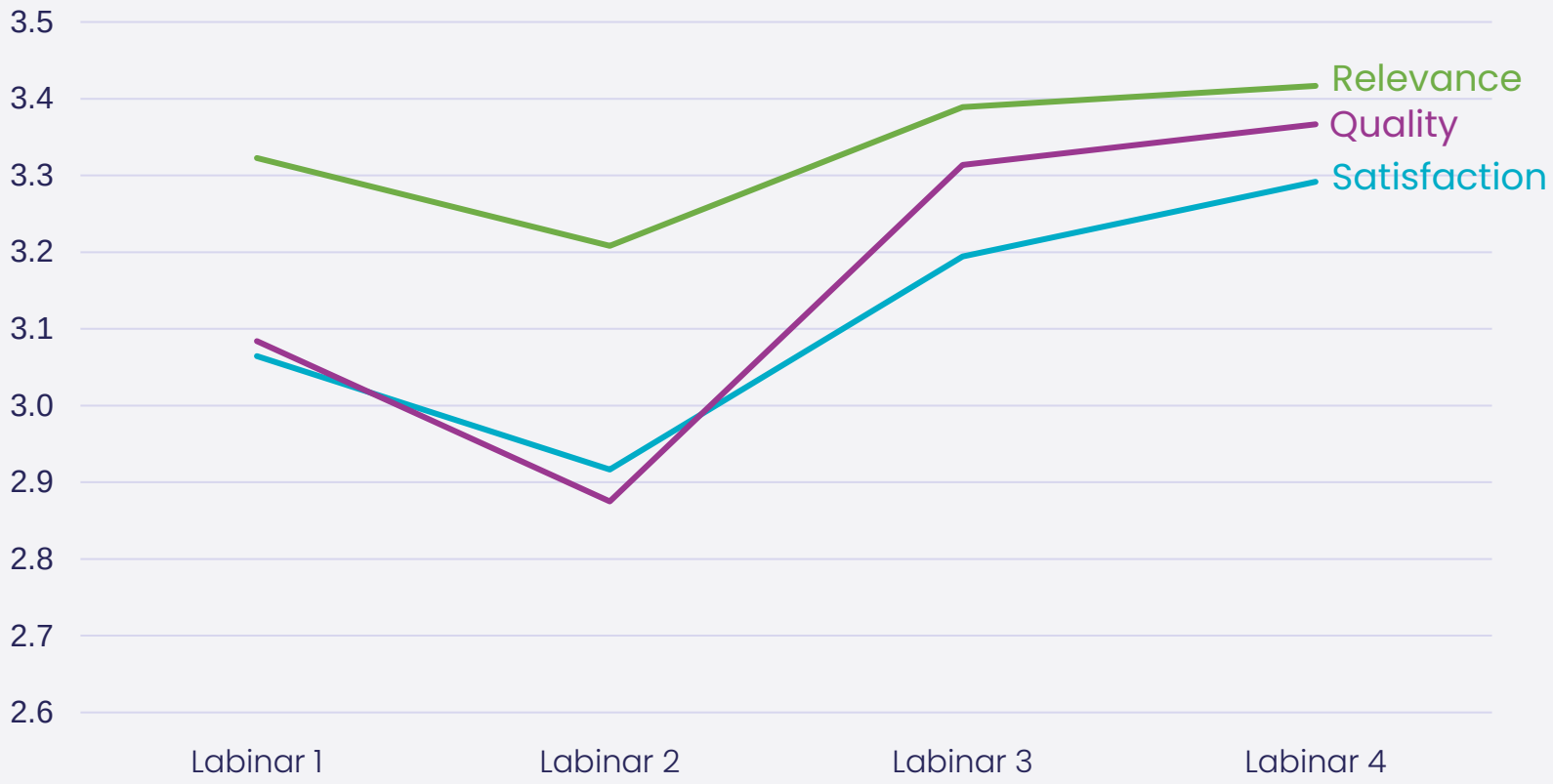
Labinars have improved over time

As we have integrated feedback of the Labinars, ratings of **Quality, Relevance,** and **Satisfaction** have increased over time.



A higher percentage of participants have increased knowledge

As we have integrated feedback of the Labinars, more people have **indicated that their knowledge has increased**, and fewer people have indicated that their **knowledge has not increased**.

Marketing & Communications

Developed Logo

Designed Website

CTData Strategic Planning

CTdata Strategic Planning

GET YOUR DATA HOUSE IN ORDER ™

Supporting the mission of ctdata.org

FUNDERS

Learn how your grantees can improve their data infrastructure so they can implement their missions with more effectiveness.

Explore for funders

NONPROFITS

Improve your internal data structures and processes so you can better understand the results of your work using data.

Explore for nonprofits

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Designed Website: Foundation Clients

Help nonprofits thrive

Let us work to build the capacity of nonprofits you support so they can do the great work you know is possible. Through CTData Strategic Planning, your partners can improve the quality of their data so they can make good decisions about their future.

Empowering nonprofits to use their data as a strategic asset.

As a nonprofit, we understand what it's like to be dedicated to a mission you believe in while also needing to understand better how to improve your effectiveness. We have supported thousands of Connecticut professionals so they can use data to make a difference in the lives of those systematically left behind.

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Designed Website: Nonprofit Clients

Get Your Data House in Order

Let's work together to build a realistic plan so your team has access to the high-quality data you need.

Trusted by nonprofits with data needs.

We know what it means to be dedicated to a mission you believe in. We have supported thousands of Connecticut professionals so they can use data to make a difference in the lives of those systematically left behind.

And we understand the frustration of needing to use data to help you fund and improve your important work, but not knowing how.

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Published on Social Media

Announced in Newsletter

We Launched a New Social Enterprise: CTData Strategic Planning!

Through our work with data professionals across the state, we have found that either nonprofits are awash in data they don't know how to use, or nonprofits aren't sure what to collect and how to use it strategically. If this sounds familiar, learn more about this service here. More information will be coming soon.

Described in Blog Post

What is CTData Strategic Planning?

May 12, 2022 · Michelle Riordan-Nold

We Launched a New Social Enterprise: CTData Strategic Planning!

AT CTData, a core part of our work centers around building data literacy skills. We incorporate data literacy into almost every aspect of our work and we have seen a few challenges that organizations face when it comes to data either:

- Nonprofits are awash in data that they don't know how to use to show their impact; or
- Nonprofits are uncertain what data to collect, how to collect it, and how to use it strategically.

This situation presents many challenges to nonprofits - and an opportunity.

To address the problem above, CTData launched CTData Strategic Planning, a social enterprise that provides training and coaching to help nonprofits build Data Strategic Plans. Theprocesshelps nonprofits align data with the mission of the organization so they can learn whether they are reaching their goals. Organizations learn how to move from collecting data reactively toa proactive and strategic purpose. Data Strategic Planningallows organizations to take ownership over their data, measure their impact, and tell their story through data.

With aData Strategic Plan,nonprofit staff can plan their data collection, analysis, and reporting process to inform decision-making. The Plan is a resource for staff to understand every step of the process, from identifying program goals, to collecting data, analyzing data, and reporting findings.

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Sales & Business Development

Developing Proposal

Connecticut Data Collaborative
10 Constitution Plaza
Hartford, CT 06103

CTdata Strategic Planning

GET YOUR DATA HOUSE IN ORDER ™

Supporting the mission of ctdata.org

Helping Your Grantees Thrive

As a funder, you seek strategies that result in positive change for communities you care about. To do this, you value information from grantees and partners that can help inform your strategies. You also believe strongly in the work of your partners. Yet you may see them with what data to collect or how to collect it. This results in time wasted trying to wrangle poor-quality data, discouragement over whether they make a difference, and potentially even staff attrition.

The field of philanthropy has been increasingly investing in capacity building for nonprofits as well as in evaluation and research for nonprofits. CTData Strategic Planning unites these two priorities together into one service that allows you to support your grantees and partners to gain agency over their data and approach their data strategically.

Through this service, your grantees will develop data as a strategic asset for their long-term health. Organizations become empowered to change their strategies based on high-quality data, and to tell compelling stories about the difference they make in the lives of those they serve.

As nonprofits face increasing competition for private and public funding, developing a data strategy to measure outcomes is critical.

Cultivating Prospective Clients

Hartford Foundation for Public Giving

Fairfield County's Community Foundation

Traveler's Foundation

Heidenreich Family Fund

Ritter Family Foundation

Graustein Donor Advised Fund

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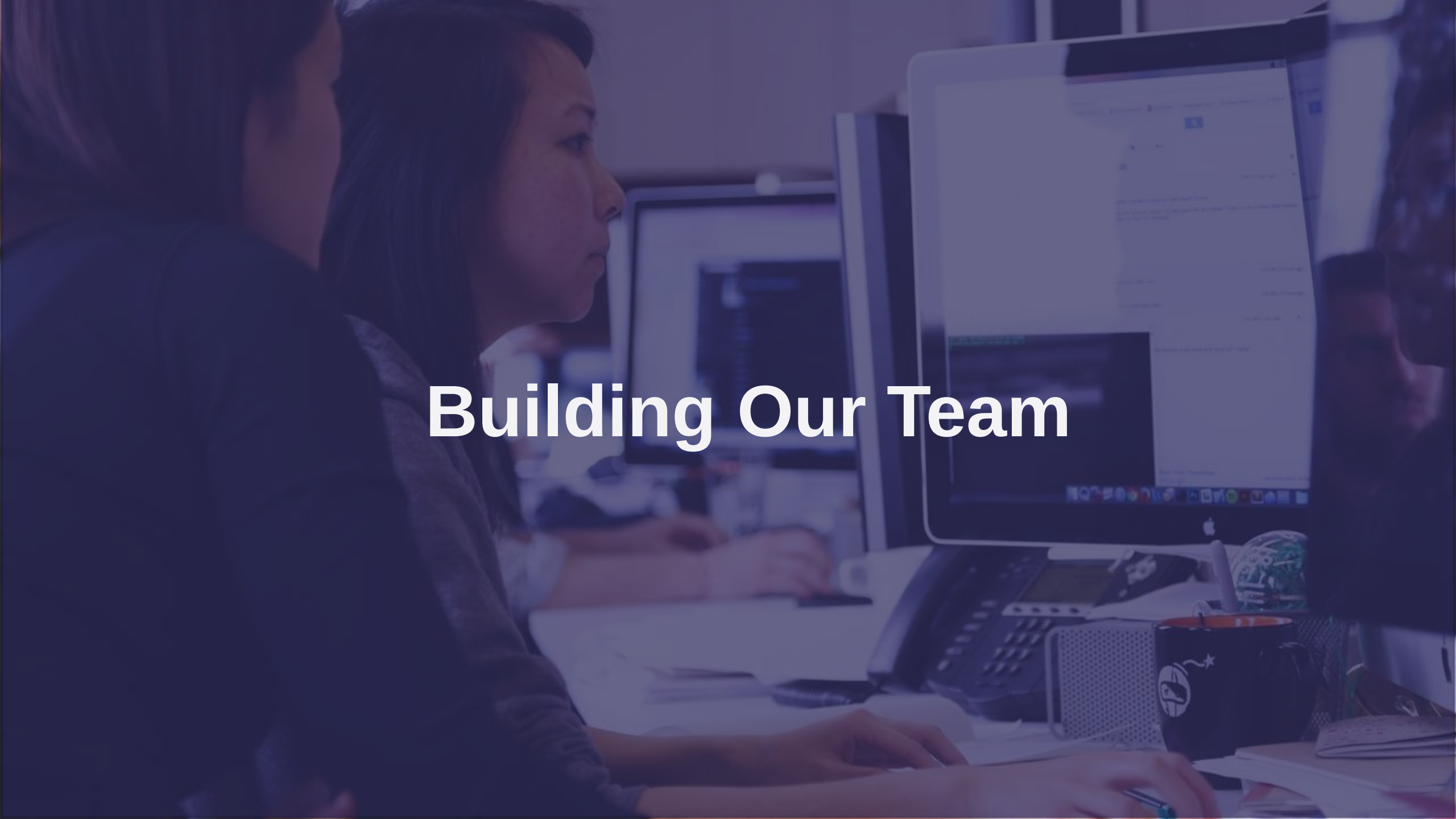
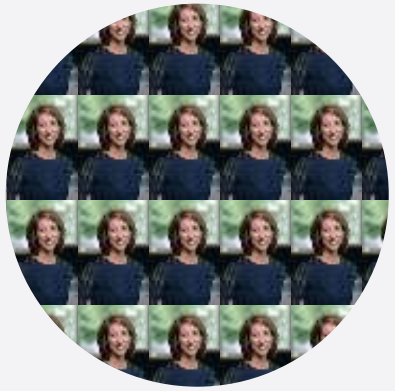


Building Our Team

Staffing

Sarah Eisele-Dyrli

Assistant Director



Michelle Riordan-Nold

Executive Director

Jaclyn Vancour

Data Engagement Specialist

TBD

Nonprofit Strategy & Capacity Building Coach

Nonprofit Strategy & Capacity Coach Job Description

About

At the Connecticut Data Collaborative (CTData), we empower an ecosystem of data users by democratizing access to public data and building data literacy skills. We are seeking an enthusiastic, entrepreneurial, and organized person whose strength is in project management but also loves data believes in our mission and wants to help grow our new Social Enterprise, CTData Strategic Planning, as the **Data Strategy & Capacity Building Coach.**

CTData Strategic Planning is a new venture providing

Reporting to the Assistant Director, the Data Strategy & Capacity Building Coach will:

- Prepare, organize, and deliver CTData Strategic Planning including conducting the learning labs; holding one-on-one consultations; and providing follow-up technical assistance as needed.
- Support business development efforts including:
  - Outreach to potential funders
  - Building current and potential funding relationships
  - Drafting proposals, including budgets and work plans
  - Helping to deliver revenue targets based on business plan financial projections
- Expand and grow CTData Strategic Planning through marketing and communications outreach to prospective clients.

Desired Qualifications

- Master's degree in a related field (such as MPP or MPA) or certificate in evaluation
- Experience working and consulting with organizations
- Evaluation skills or experience as an evaluator
- Exceptional organizational skills, strong attention to detail, time management skills, and ability to manage client relationships
- Strong communication and interpersonal skills including good presentation skills
- Intellectual curiosity, creativity, and a strong desire and capacity for diversity in professional challenges
- Passion and commitment to helping organizations achieve greater social impact (through goal clarity and results-oriented strategy)
- Strong analytical mind and able to hold the big ideas while focusing on the details
- Self-starter with the ability to manage and prioritize work in a fast-paced environment

CTData, a 501(c)(3) non-profit, promotes a hybrid work policy with HQ in downtown Hartford.

Next Steps

Identify Phase II Participants

Through conversations with funders

Onboard first client

Communicating with prospects

Hire Strategy & Capacity Building Coach

Goal for staff person hired by Oct 1

Thank you!

We could not have made it this far without the support of:

- No Margin No Mission – Michael Oxman
- Sara Leonard
- Our Board with a special thanks to David Nee who attended all sessions and Tyler Kleykamp's participation in our fundraising calls
- Our Staff
- The Hartford Foundation for Public Giving

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Thank you
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