



# Data Management

St Pancras Community Association

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Joshua Barney, Matthew McGourty, Vivian Vacharakupt, Annie Zimmerman

# Meet the Team



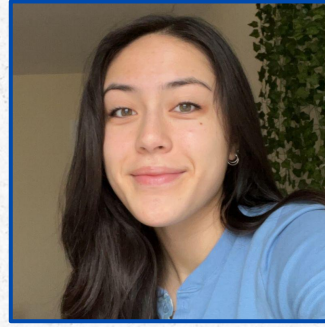
**Josh**

Mechanical Engineering



**Matt**

Computer Science



**Vivian**

Civil Engineering



**Annie**

Computer Science

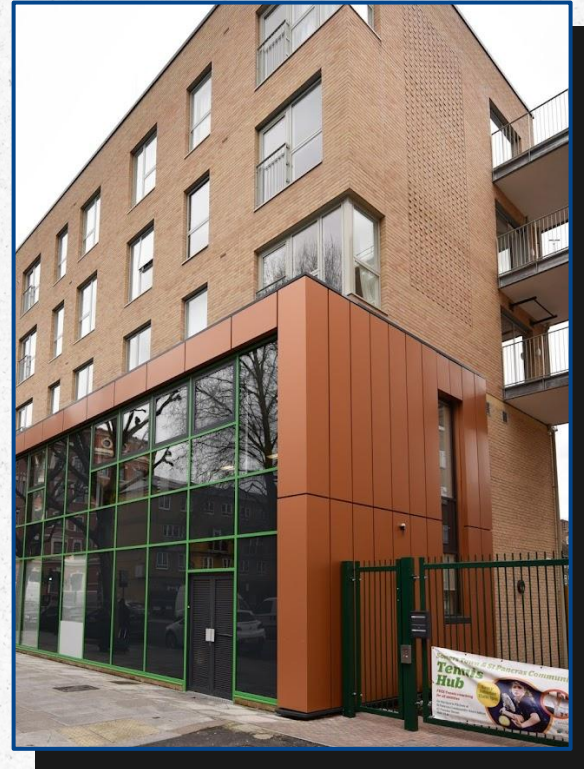


# The Issue

The SPCA's current system of data collection and management is unsatisfactory.

# The Goal

Find a better system to help them improve services and get more funding.



# What is a CRM system?

Used to track and manage data between clients and an organization, with a **one-to-one relation** to an individual.



Save staff time



Track client information




Provide grant management







# Examples of Data in CRM

## Member details

Who has viewed this page? 


▼ Details

[Edit Data](#)

Full Name	Jane Doe	
Email	janedoe1971@gmail.com	
Phone	33711223345	
Postcode	WC1B 5AJ	

- Name
- Contact information
- Postcode
- Interactions with Organization


6 days ago



Yoga  
Friday, 14 April 2023





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6 days ago

 Yoga  
Friday, 14 April 2023



# Objectives

1

Determine the data management needs of the SPCA

Evaluate current and best practices of data management at other community centers

2

3

Assess advantages and disadvantages of CRMs used in the voluntary services sector

Provide a roadmap with recommendations and begin implementing early phases

4

# Needs Assessment

To understand the state of the data management system at the SPCA and what they wanted in a new CRM, we:



**Interviewed** employees at the SPCA



**Organized** findings into a checklist of requirements





# Interviews with SPCA Staff

**Q:** Why do you collect data?

**A:** To meet **funding requirements**

**Q:** What do you do with data after it is collected?

**A:** Use it to **report to funders** or do not use at all

**Q:** Do you have a standard practice for program evaluation using data?

**A:** No, evaluative data is collected on an ad hoc basis to **report to funders**

**Key theme?** **data collection is for funding purposes**

**Missed opportunity?** **program improvement**

# Needs Assessment Results

## CRM Features Checklist

- ☐ Tracking Beneficiary Information
- ☐ Membership forms
- ☐ Restrictions & Permissions
- ☐ Tagging users & sorting by tags
- ☐ Supporting integrations
- ☐ Event tracking (scheduling)
- ☐ Room booking forms
- ☐ Live technical support

We categorized the data found from SPCA staff interviews into **eight requirements**.

We hoped to find a **single system** that would meet all eight requirements.



# Needs Assessment Results

## CRM Features Checklist



Tracking Beneficiary Information



Restrictions & Permissions



Tagging users & sorting by tags



Supporting integrations



Event tracking (scheduling)



Room booking forms



Live technical support

### Tracking Beneficiary Information

- Data with one-to-one relation to a beneficiary
- Examples: names, postal code, contact information, etc
- Exact purpose of beneficiary-focused CRMs

# Needs Assessment Results

## CRM Features Checklist



Membership forms



Tagging users & sorting by tags



Supporting integrations



Event tracking (scheduling)



Room booking forms



Live technical support

### Membership forms

- Automate collection of member data through integrated membership forms
- Most of SPCA beneficiary data comes from initial membership forms



# Needs Assessment Results

## CRM Features Checklist

☐ Tracking Beneficiary Information

☐ Marketing Forms

☐ Restrictions & Permissions

☐ Tagging users & sorting by tags

☐ Supporting integrations

☐ Event tracking (scheduling)

☐ Room booking forms

☐ Live technical support

### Restrictions & permissions

- Beneficiary data is often sensitive
- Examples: health issues, vaccination status, childrens data for nursery
- This data needs to be kept behind additional permission-locks

# Needs Assessment Results

## CRM Features Checklist

☐ Tracking Beneficiary Information

☐ Membership forms

☐ Tagging users & sorting by tags

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☐ Live technical support

### Tagging users & sorting by tags

- Reports must be generated based on user tags
- Example: “children under 5,” “elderly”



# Needs Assessment Results

## CRM Features Checklist

☐ Tracking Beneficiary Information

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### Supporting integrations

- EventBrite
- MailChimp
- Website form integrations

# Needs Assessment Results

## CRM Features Checklist

☐ Tracking Beneficiary Information

☐ Membership forms

☐ Restrictions & Permissions

☐ Tagging users & sorting by tags

☐ Event tracking (scheduling)

☐ Live technical support

### Event tracking (scheduling)

- Ability for beneficiaries to sign up for events
- Allows event attendance tracking



# Needs Assessment Results

## CRM Features Checklist

☐ Tracking Beneficiary Information

☐ Membership forms

☐ Restrictions & Permissions

☐ Tagging users & sorting by tags

☐ Supporting integrations

☐ Room booking forms

☐ Live technical support

### Room booking forms

- One of SPCA's revenue streams is room hire

# Needs Assessment Results

## CRM Features Checklist

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- ☐ Tagging users & sorting by tags
- ☐ Supporting integrations
- ☐ Event tracking (scheduling)

☐ Live technical support

### Live technical support

- Lack of technical expertise is a major issue at nonprofits





# Nonprofits and Funding Bodies

We interviewed 3 local nonprofits  
and 1 funding body

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Goal: To learn more about systems other  
centers use for data and information  
fundings want.

# Results of Nonprofit Interviews

## Data Nonprofits Collect

### Data on Beneficiaries

- ☐ Postal Code
- ☐ Ethnicity
- ☐ Contact Information (phone number, email)
- ☐ Relationships between beneficiaries, referrals
- ☐ Wellbeing notes
- ☐ Programs they have historically attended
- ☐ Vaccination records

### Data on Programs

- ☐ Cost of program
- ☐ Status before and after program (for outcomes)
- ☐ Number of people attending the service

## Why collect data?

Meet funding requirements

Compare data collected  
**against census**

## Insight on specific CRMs

1. Salesforce
2. Substance Views
3. Time to Spare



# Emerging Themes

## Questions



What **works well** in your current system?



What problems did you have in **implementation**?



What **works poorly** in your current system?



CRMs help track the **impact** of the organizations on their constituents



Lack of **technical support** (specifically with **Salesforce** and **Substance Views**)



No support for complex **booking systems** (sliding scale payments)

# Learning About CRM Systems

To find which CRM would be the best fit for the SPCA, we had to learn about the different types by:







**Researching** CRMs at different price points that cater to nonprofits



**Meeting** with CRM sales to understand the various features and plans offered



# Potential Free CRM Solutions

	1	2	3
	Google Suites	Hubspot	Time to Spare
 Technical Support	Poor	Average	Good
 Expected Price	Free	Free	Free
 Checklist Features (out of 8)	3	5	7
 Client-to-Employee Ratio	12,780	20	167

Our free recommendation:

# *Time to Spare*

- Well reviewed, responsive technical support
- No additional financial stress
- Meets most checklist items

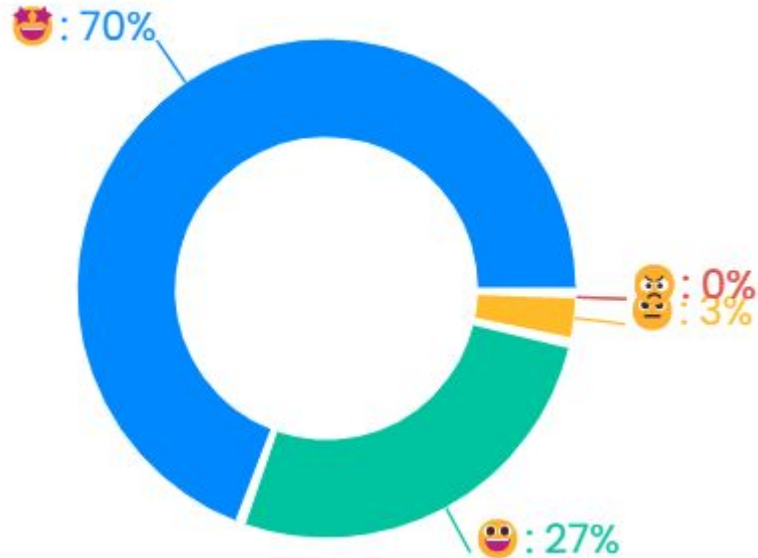
**Deliverable:** User-manual deliverable will be provided to the SPCA

## CRM Features Checklist

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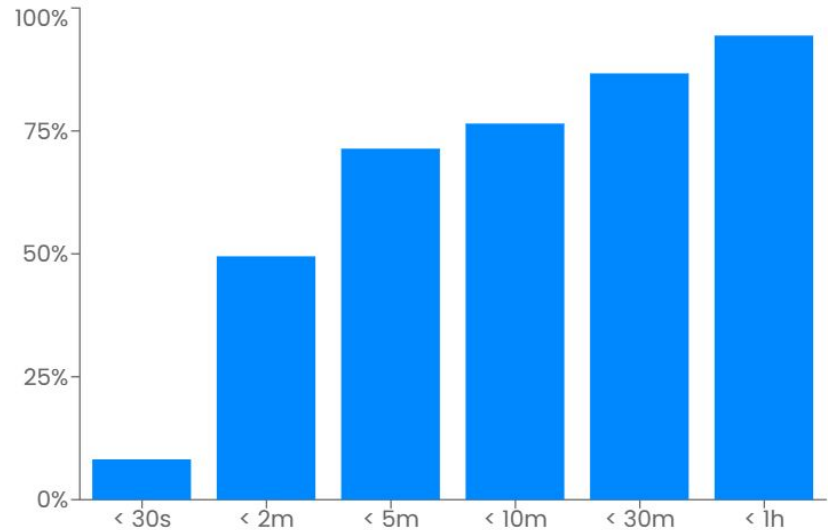


# Time to Spare Testimonials



Support Conversations Reviews

(Time to Spare, 2023)



Response Time Distribution

(Time to Spare, 2023)

# Potential Paid CRM Solutions

	1	2	3
	Insightly	Donorfy	Beacon
Technical Support	Average	Good	Good
Expected Price	£203/mo	£125/mo	£104/mo
Checklist Features (out of 8)	7	7	7
Client-to-Employee Ratio	8,571	50	33



Our paid recommendation:



- More technical support
- Powerful tools
- More customizable

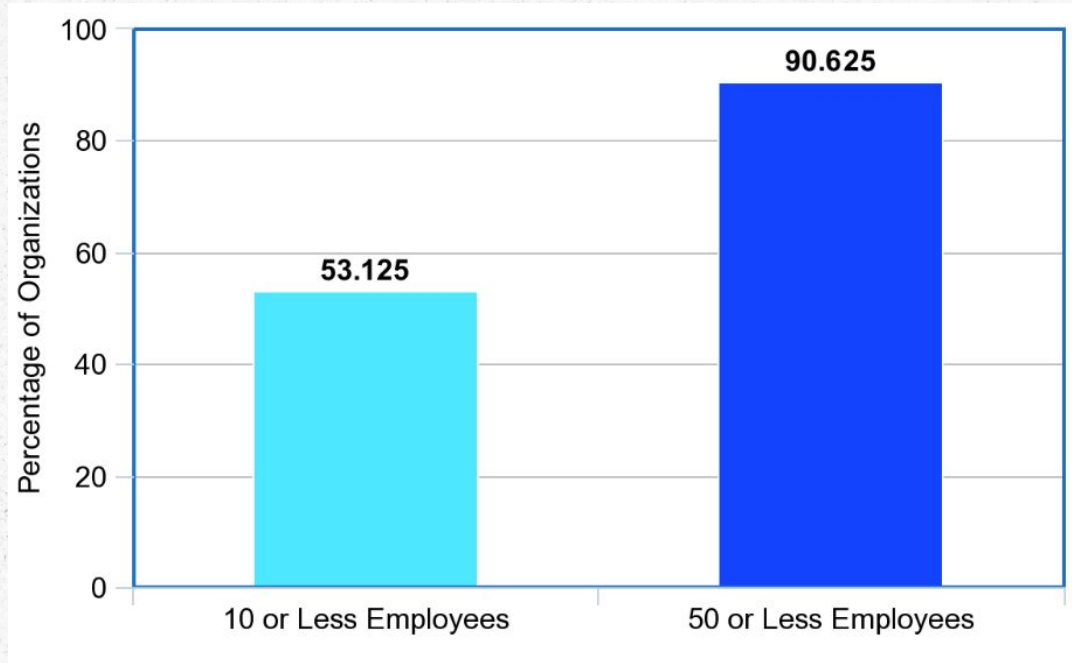
**Deliverable:** Beacon and Time to Spare comparison

## CRM Features Checklist

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# Beacon Reviews

Overall	★ 4.9
Ease of Use	★ 4.8
Customer Service	★ 5.0
Features	★ 4.7
Value for Money	★ 5.0





# Timekeeping



During discussions, we learned the SPCA could benefit from a better timekeeping system



We prototyped and tested a digital system for them



We are ready to implement a final system

# Our Timekeeping Solution

### Check-In Beta Test

jlabarney@gmail.com [Switch account](#)

Not shared

What's your name?

☐ Angela

☐ Fariba

☐ Alia

Check in or out?

☐ In

☐ Out

k-In Beta Test (Responses)			
Name			
In/Out	Time	Checked-Out	Number of people in the Building
In	4/11/2023 8:26	Checked-Out	0
In	4/11/2023 8:43	Checked-Out	
In	4/11/2023 9:17	Checked-Out	
Out	4/11/2023 17:46	Checked-Out	
Out	4/11/2023 17:51	Checked-Out	
In	4/12/2023 8:41	Checked-Out	
In	4/12/2023 8:54	Checked-Out	
Out	4/12/2023 12:39	Checked-Out	
In	4/12/2023 13:03	Checked-Out	
Out	4/12/2023 14:37	Checked-Out	

Check-In Beta Test (Responses)			
Name			
Time For session (in Hours)	Day of Week		
4/11/2023 8:43	In		
4/11/2023 17:46	Out		9 Tuesday
4/12/2023 8:54	In		
4/12/2023 12:39	Out		3.7 Wednesday
4/12/2023 13:03	In		
4/12/2023 17:31	Out		4.4 Wednesday
4/13/2023 8:52	In		
4/13/2023 13:07	Out		4.2 Thursday
4/13/2023 13:38	In		
4/13/2023 16:37	Out		2.9 Thursday

## Input

Two click sign-in



# Our Timekeeping Solution

Check-In Beta Test

jlabarney@gmail.com Switch account

Not shared

What's your name?

☐ Angela

☐ Fariba

☐ Alia

Check in or out?

☐ In

☐ Out

Submit

Check-In Beta Test (Responses)

File Edit View Insert Format Data Tools Extensions Help

100% 123 Arial 10 B I A

	Name	In/Out	Time		Number of people in the Building
1					0
2		In	4/11/2023 8:26	Checked Out	
3		In	4/11/2023 8:43	Checked Out	
4		In	4/11/2023 9:17	Checked Out	
5		Out	4/11/2023 17:46		
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4/13/2023 13:07	Out	4.2 Thursday
4/13/2023 13:38	In	
4/13/2023 16:37	Out	2.9 Thursday

## General Sheet

See all employees in the SPCA  
in real time

# Our Timekeeping Solution

Check-In Beta Test

jlabarney@gmail.com Switch account  
Not shared

What's your name?

☐ Angela  
☐ Fariba  
☐ Alia

Check in or out?

☐ In  
☐ Out

Submit

Check-In Beta Test (Responses)

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Number of people in the Building 0

Check-In Beta Test (Responses)

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4/13/2023 13:07 Out	4.2	Thursday
4/13/2023 13:38 In		
4/13/2023 16:37 Out	2.9	Thursday

## Personal Page

Tracks time in and time out,  
calculating time worked



# Timekeeping Recommendations

## Full roster participation

Add the whole staff to the system



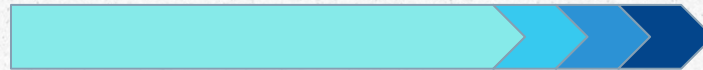
## One admin in charge

Assign one member of staff (likely the receptionist) to run the system



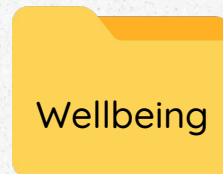
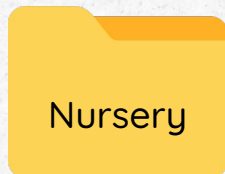
## Dual system in interim

While getting up to speed, still sign in on paper as well





# Google Suites Organization



Main organizational drive has only departmental folders within it

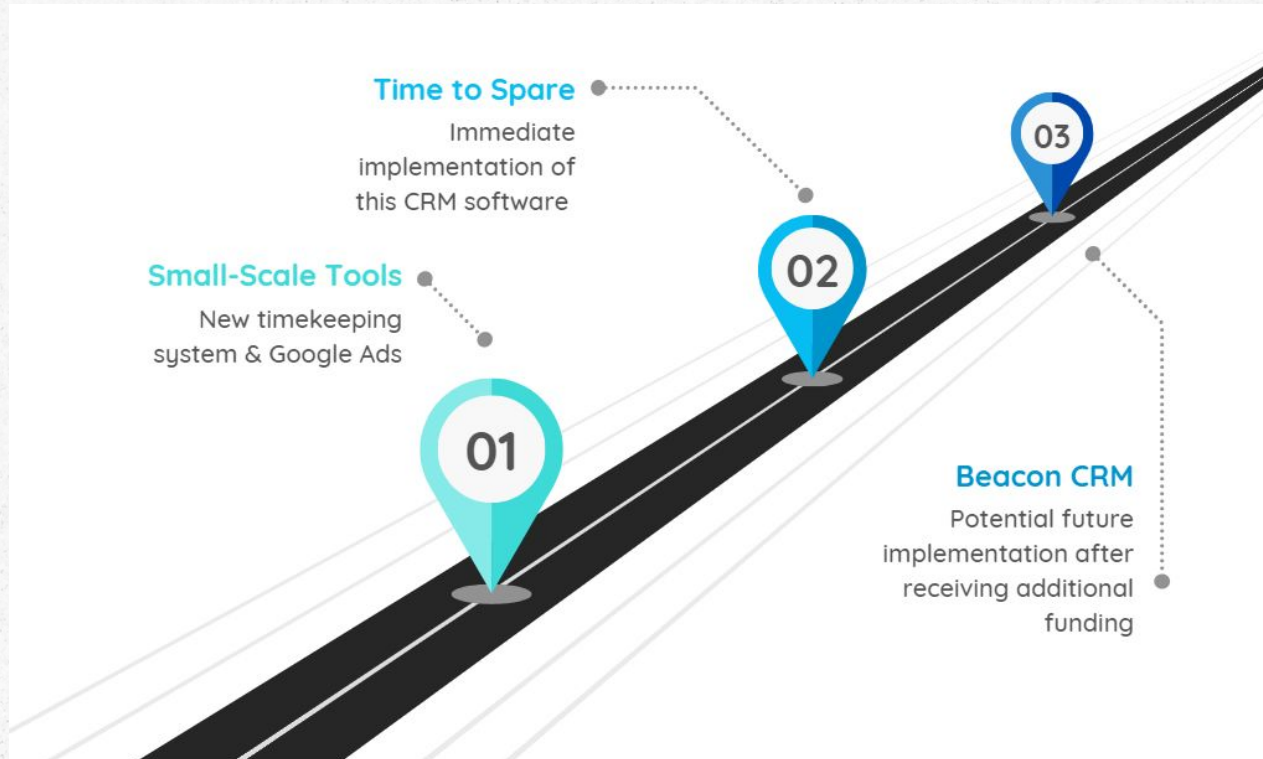
Files within folders named using the following schema:

**“foldername\_subtype\_year-month-date”**

All employees filter alphabetically

**We are providing a reference sheet to the SPCA with this information**

# SPCA's Roadmap for Data Management



# Thank you!

Special thanks to –



Nigel Spencer  
Angela Lewis



# WPI

Dominic Golding  
Laureen Elgert  
Sarah Riddick





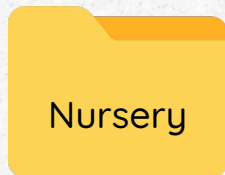
mickel groove



# SLIDE GRAVEYARD



# Google Suites Organization



Going into one of these folders...



# Paid Recommendation



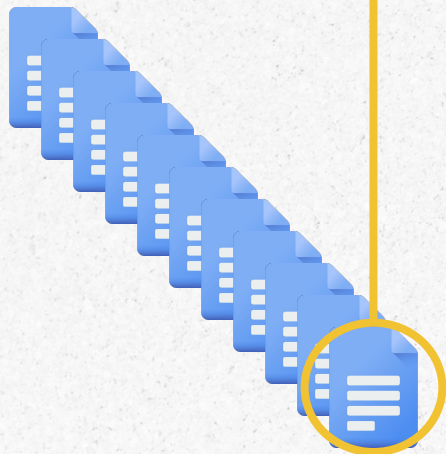
- ✓ Highly reviewed
- ✓ Additional features
- ✓ Meets most checklist items

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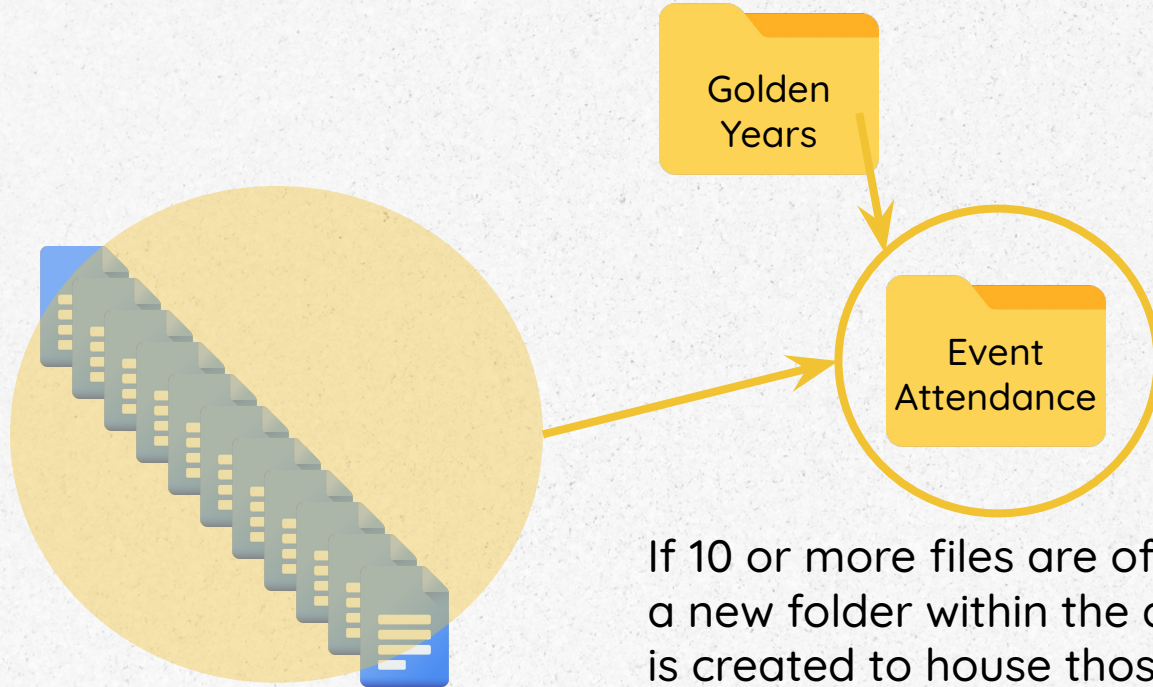
“foldername\_subtype\_  
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# Google Suites Organization



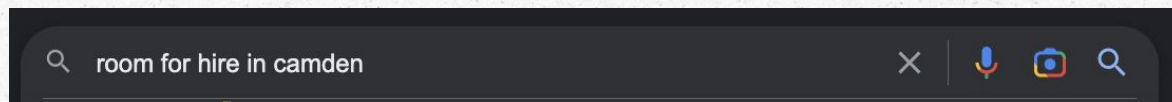
If 10 or more files are of the same type, then a new folder within the departmental folder is created to house those files



# Google Suites Ad Grant

SPCA qualifies for this Ad Grant

**What is the grant?** Receive \$10,000 to bid for search-term advertisements on Google.



Search can promote link to SPCA room hire



What's on ▾

Space for hire

Golden Years

Wellbeing

Children & Families ▾

Contact

Opportunities

Donate with **JustGiving**

# Fonts & colors used

This presentation has been made using the following fonts:

## **Hammersmith**

(<https://fonts.google.com/specimen/Hammersmith+One>)

## **Work Sans**

(<https://fonts.google.com/specimen/Work+Sans>)





# Free Recommendation

## *Time to Spare*



Well reviewed, responsive technical support

No additional financial stress

Meets most checklist items