Using Data to Serve the St Pancras Community

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Abstract

The goal of this project was to identify strategies and software that may be used to better manage the collection, maintenance, and analysis of data at the St Pancras Community Association (SPCA). We conducted background research and interviewed staff at the SPCA, other community centers, a local funding organization, and Customer Relationship Management (CRM) companies. We conducted a needs assessment and developed criteria for choosing a CRM and data management strategies. We recommend SPCA immediately implement simple fixes, such as timekeeping and organization structures, and adopt the free CRM "Time to Spare." Pending the availability of funds in the future, we recommend SPCA move to the paid CRM "Beacon" which offers additional tools and functionality.

Acknowledgements

Our team would like to extend our gratitude to Professor Dominic, who has provided continuous guidance and assistance throughout this project and helped ensure that we were prepared to accomplish the goals and objectives that we set out. We also would like to thank our advisors, Professor Laureen Elgert and Professor Sarah Riddick, for all of their support, assistance, and motivation that helped us complete this project to the best of our abilities. With their help, our team was able to overcome difficulties and find new ways to further help the Saint Pancras Community Association.

We would also like to thank our sponsor, Nigel Spencer, for making this opportunity possible and collaborating with us in developing our project. We also express our gratitude to all of the staff at the SPCA for treating us with kindness and providing us with resources and crucial information through individual interviews which helped us complete this project.

We also thank the other local community organizations, CRM system staff, and funding bodies who took the time to answer our questions during interviews. These discussions provided our team with important knowledge that helped us reach a final recommendation that we believe will suit the SPCA.

Finally, we would like to thank our other students who joined us on this IQP experience and provided our team with helpful feedback and amazing memories in London.

Executive Summary

1. Problem Addressed

The Saint Pancras Community Association (SPCA) was founded in 1999 in the London Borough of Camden to provide services to residents, especially those living in the Saint Pancras and Somers Town ward (SPCA.org, 2023). The SPCA is in a neighborhood with a greater proportion of at-risk and underserved groups than other Camden Wards (Camden Council, 2016). The SPCA provides a variety of services to meet the needs of those groups, such as programs for the elderly, a nursery, and a community kitchen (SPCA.org, 2023). The SPCA collects large quantities of data on their beneficiaries and programs and has been managing this data using Google spreadsheets and paper forms. These approaches limit how the SPCA collects, evaluates and reports data that might be useful in evaluating services and attracting funding.

2. Objectives

The overall goal of this project was to identify strategies and software that may be used to better manage the collection, maintenance, and analysis of the SPCA's organizational data. Our team achieved this goal through the following four objectives:

(1) Determine the data management needs and preferences of the SPCA staff, volunteers, patrons, and other stakeholders (such as members of the board of trustees and outside funders).

(2) Evaluate current and best practices in the management of customer data by other community organizations, particularly as it relates to funding practices.

(3) Assess the advantages and disadvantages of different types of customer relationship management (CRM) systems, including freeware and commercial options, used in the voluntary services section.

(4) Provide a roadmap for short to long-term data management and begin implementing early phases.

3. Methods

We conducted background research on Customer Relationship Management (CRM) systems and interviewed staff at the SPCA, other community centers, a local funding organization, and CRM companies. During interviews with SPCA staff, we asked what kind of data they collected, what their process for data collection was, what went well in this process, what did not go well in this process, and what they use data for. Data from interviews with SPCA staff was used to develop a checklist of criteria for a data management system, and this criteria was confirmed by interviews with local community center staff who were asked similar questions. We also sought potential data management solutions used by other centers during staff interviews. The checklist of criteria was tested against potential CRMs, and if a system did not meet enough of the selection criteria, we eliminated it from our list of contenders. Finally, we combined the results of our data collection and research into a final set of recommendations for the SPCA, including a free, paid, and other short-term technical solutions.

4. Needs Assessment: Determining the Data Management Requirements of the SPCA

We found that the SPCA collects large amounts of data on beneficiaries, including contact information, addresses, health status, and services that they use (Figure 1). All of this data is known as "beneficiary data."

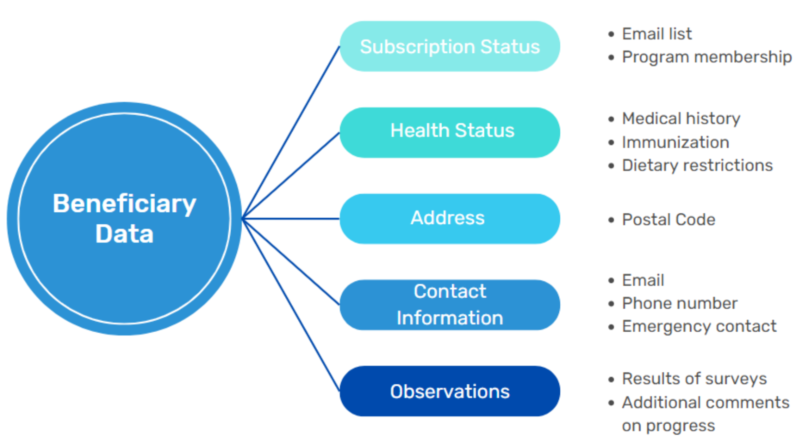

Figure ES1 - Data collected by the SPCA which counts as "beneficiary data".

Currently, the SPCA employees link this data to beneficiaries in an Excel or Google Sheet, holding each person in one row of the sheet while columns contain data about that beneficiary. The SPCA collects most beneficiary data using paper membership forms, which is then manually entered into digital spreadsheets. When asked, staff reported that this system performs poorly, as it lacks automation and costs employee time. Staff reported that they must manually sort through the nursery forms to retrieve and update data. This process is laborious and does not work well for the department's needs. Many staff highlighted challenges associated with the lack of standardization, automation, and centralization of data collection and storage. There is no standardized evaluation process at the SPCA. Many evaluation efforts are conducted on an ad hoc basis to meet funding requirements and lack specific milestones and markers by which to gauge program success.

Based on the needs assessment, we developed a set of criteria for the selection and design of a new data management system. These criteria are depicted in a checklist form (Figure 2). "Tracking beneficiary information" and "tagging users & sorting by tags" are two important criteria. All SPCA staff emphasized the need to track beneficiaries as a basic administrative function. Tagging would allow staff to identify and sort beneficiaries by program, health status, and other attributes to demonstrate to funders what kinds of beneficiaries are served and how they benefit. Since using data to meet funding requirements is a major cost of time at nonprofits, features which simplify report generation for funders are particularly valuable.

CRM Features Checklist

- [ ] Restrictions & permissions
- [ ] Tagging users & sorting by tags
- [ ] Tracking beneficiary information
- [ ] Membership forms
- [ ] Room booking forms
- [ ] Event tracking (scheduling)
- [ ] Supporting integrations
- [ ] Live technical support

Figure ES2 - Checklist of Eight Requirements for Evaluating CRMs.

5. Current and Best Practices at Other Organizations

We interviewed staff at three community centers and one funding organization based in Camden. These interviews confirmed the findings from our interviews with SPCA staff and introduced potential data management solutions. The three community centers are of a similar size to the SPCA in terms of staffing and beneficiary base, and provide similar services.

Although the three centers collect similar data in a similar fashion as SPCA, these centers collect additional data and conduct more evaluative efforts. Centers reported using additional demographic data to report to funders, such as ethnicity,which the SPCA does not currently do. One community center surveys beneficiaries on program registration and continues to survey beneficiaries as they progress through the program. The center uses this data to demonstrate the effectiveness of programs to funders. Currently, the SPCA does not have a systematic or standardized process for effective program evaluation.

The community centers interviewed used the data management systems Time to Spare, Salesforce, and Substance Views. The funding organization had begun recommending Time to Spare to grantees. The community center using Time to Spare was very satisfied with the system. The other two community centers reported less satisfaction with their current systems. The

Salesforce user was dissatisfied because the system was expensive, implementation took a long time, and features initially promised by their third-party installation consultant were excluded. The center using Substance Views found the software does not meet all its needs, so they are seeking software to supplement its capabilities. Based on this feedback, we concluded that Time to Spare was the best available option.

6. Advantages and Disadvantages of Different CRMs

Based on background research and interviews, we drew up a short list of six CRMS that might meet SPCA's needs and our selection criteria (Figure 3).

Figure ES3 - Final contenders for data management systems for the SPCA

The first three systems listed (Google Suites, HubSpot, and Timer to Spare) are free systems. As can be seen in Table ES1, Time to Spare performed best in all categories except the client-to-employee ratio, which we used as an indicator of customer support. As a small Camden-based CRM, Time to Spare has only three employees and a client base of over 500. Despite this, we determined Time to Spare is still likely to be the best fit for the SPCA since it has "Good" technical support (as determined by reported response time and a personal interview with the staff of Time to Spare) and fulfills 7/8 checklist requirements.

	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

Table ES1 - Comparison of Free CRM Systems.

The last three systems in Figure ES3 (Insightly, Donorfy, and Beacon) are paid systems, compared in Table ES2. Insightly was eliminated as a contender because of its higher cost margin. Donorfy was eliminated because it focuses on donors instead of beneficiaries, and the SPCA requires a system focused on tracking beneficiary information. This leaves Beacon as the best option.

	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

*- US Time Zone
**- Number calculated with the assumption of 7 users
*** - Certain features can be added for an additional cost

Table ES2- Comparison of Paid CRM System

7. Conclusions and Recommendations

Based on our background research and interviews with staff at SPCA, three local community centers, and a local funding agency, we recommend a “roadmap” approach to implementing improved data management practices (Figure ES4). We recommend:

(1) SPCA takes immediate steps to better organize its data collection and storage procedures, using Google Suites and the timekeeping system we devised.

(2) SPCA considers implementing Time to Spare in the short term. Time to Spare is a free CRM that appears to have all the features currently needed by SPCA. It has good technical support and is being promoted by one of the major local funding organizations of nonprofits in Camden.

(3) Pending the availability of funds, SPCA should implement the paid CRM option, Beacon. Beacon provides a superior package to Time to Spare, such as better reporting features. If the SPCA’s needs are not fulfilled by Time to Spare, and they acquire funding, then Beacon is a high quality, affordable CRM option.

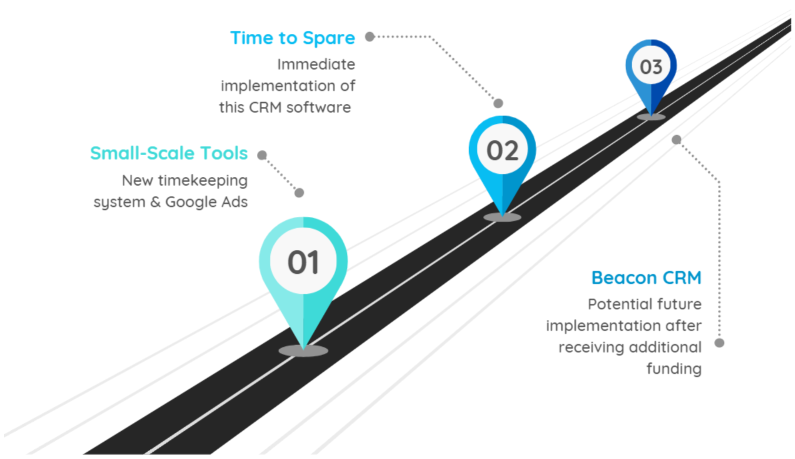

Figure ES4 - Graphical representation of roadmap recommendations

Authorship

Section	Primary Author	Secondary Author	Primary Editor	Secondary Editor
Abstract	JB		AZ	VV/MM
Executive Summary	AZ		VV	MM
1. Introduction	AZ	VV		
Background				
2.1 History of Community Centers	JB	AZ	MM	VV
2.2 The Role of Community Centers	AZ	VV		
2.3 Modern Challenges for Community Centers	AZ			
2.4 The Saint Pancras Community Association	VV			
2.5 Data and Data Management in Nonprofits	MM	AZ	VV	
2.6 Challenges Faced by Nonprofits When Collecting Data	AZ	MM		VV
2.7 Evaluation Practices for Nonprofits	AZ			
2.8 Customer Relationship Management Systems	MM	VV		
2.8.1 What is a CRM	VV/MM	AZ/JB		
Methodology				
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Findings				
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4.3 Results of Research and Interviews with CRMs	MM/VV		AZ	
4.4 Results of Research into Simple Solutions for SPCA's Identified Problems	JB	AZ		VV
Conclusion and Recommendations				
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5.2 System for Data Management - Immediate Implementation	VV			
5.3 System for Data Management - Advanced CRM	MM			
Appendices				
Appendix A - Additional SPCA Background	VV	AZ		
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1. Introduction

The Saint Pancras Community Association (SPCA) was founded in 1999 in the London Borough of Camden to provide services to residents, especially those living in Saint Pancras and Somers Town ward (SPCA.org, 2023). The SPCA is in a neighborhood with a greater proportion of at-risk and underserved groups than many other wards in Camden (Camden Council, 2016). The SPCA provides a variety of services to meet the needs of those groups, such as programs for the elderly, a nursery, and a community kitchen (SPCA.org, 2023). In doing so, the Saint Pancras Community Association delivers and supplements many social services provided by the local authority.

Similar to other community associations, the SPCA collects large quantities of data on their beneficiaries and programs. SPCA has been managing this data using Google spreadsheets and paper forms. These approaches limit how the SPCA collects, evaluates and reports data that might be useful in evaluating services and attracting funding. To improve the delivery of their services, better serve their community, and more easily report accomplishments to funders, the SPCA is seeking a more sophisticated data management system.

The overall goal of this project was to identify strategies and software that may be used to better manage the collection, maintenance, and analysis of the SPCA's organizational data. Our team achieved this goal through the following four objectives:

(1) Determine the data management needs and preferences of the SPCA staff, volunteers, patrons, and other stakeholders (such as members of the board of trustees and outside funders).
(2) Evaluate current and best practices in the management of customer data by other community organizations, particularly as it relates to funding practices.
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(4) Provide a roadmap for short to long-term data management and begin implementing early phases.

We conducted background research on Customer Relationship Management (CRM) systems and interviewed staff at the SPCA, other community centers, a local funding organization, and CRM companies.

To accomplish these objectives, we conducted background research on Customer Relationship Management (CRM) systems, interviewed staff at the SPCA to identify their data management needs, interviewed other community centers to identify potential data management solutions, and interviewed a local funding organization to understand funding requirements. Through this process, we provided the SPCA with a roadmap towards better data management.

2. Background

This section presents our background research which provides context for our project with the SPCA. We begin with a history of community centers and their purpose in the United Kingdom, then discuss modern challenges for community centers that impact their ability to provide services to their local communities today. Next, we describe the SPCA and their local context before moving on to a discussion of how community centers collect and use data. Finally, we outline some preliminary research on customer relationship management systems (CRMS).

2.1 History of Community Centers

Community centers have existed in the United Kingdom for over 100 years in various forms. Figure 1 shows historic milestones in the growth of community centers in the UK. Three organizations are typically credited for establishing the system of community centers in Britain: the Federation of Residential Settlements, the Education Settlements Association, and the National Council of Voluntary Organizations (Delmireva, 2017, pp. 27-28).

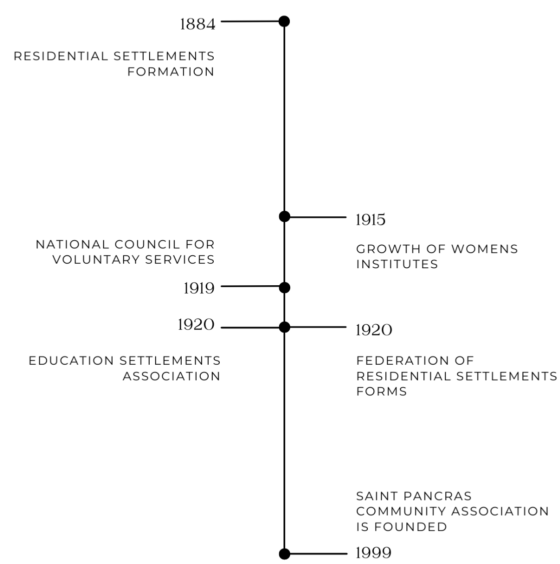

Figure 1 - Timeline of the history of community centers (Smith, 2002; Delmireva 2017).

Officially formed in 1920, the Federation of Residential Settlements comprised several university-supported houses in impoverished communities, such as Toynbee Hall and Oxford House (both formed in 1884) in the East End of London (Smith, 2002; Delmireva 2017, p. 28). Members of the university lived, supported, and mingled in these communities (Smith, 2002; Delmireva 2017, p. 28). The houses cultivated future political and community leaders, such as Clement Atlee and William Beveridge, by exposing them to the hunger, poverty, and legal challenges faced by the disadvantaged members of the community (Delmireva, 2017, p. 28). The system of houses was also instrumental in building communities of individuals that supported one another across socio-economic lines.

The Educational Settlements Association was also formed in 1920 with a focus on creating spaces to educate the community in practical skills, tradecraft, and community leadership. In combination with initiatives by the Young Men's Christian Association, Women's Institutes (formed in 1915), and Workers Educational Institutes, they allowed the idea of community education to flourish as a core tenet of community associations (Delmireva, 2017, p. 28).

The National Council of Voluntary Organizations was formed in 1919 and endeavored to legitimize almost 20,000 charity organizations that existed in various states of standing, allowing for an overarching organizational body for nonprofits. They continue to represent more than 12,000 member organizations. This accounts for over a third of the charity sector today, and they continue to support their member organizations by connecting them to the resources and people they need to survive and thrive, especially in the current turbulent political setting (Delmireva, 2017, p. 27).

Community centers continue to build on the history of these three organizations by providing a wide range of social services to the most disadvantaged in the community, including people with lower incomes, elderly people, people with disabilities, and recent immigrants (Delmireva, 2017, p. 28).

2.2 The Role of Community Centers

Community centers provide a variety of services and try to respond to the "specific needs, priorities and circumstances of the local community" (Izmir et al, 2009, p. 5). For example, if the area they serve has a predominantly elderly population, then that community center will be more likely to offer elderly care services to meet their needs. Although this data is older, Anheier and Salamon (1996), found that nonprofits in the United Kingdom had a total operating expenditure of 36.9 billion ECU (euros). A breakdown by service provided as a percentage of non-profit expenditure is demonstrated in Figure 2 (Anheier & Salamon, 1996, p. 97). Major expenditures by non-profits in the UK were for education & research, cultural and recreational services, and social services (Anheier & Salamon, 1996, p. 97).

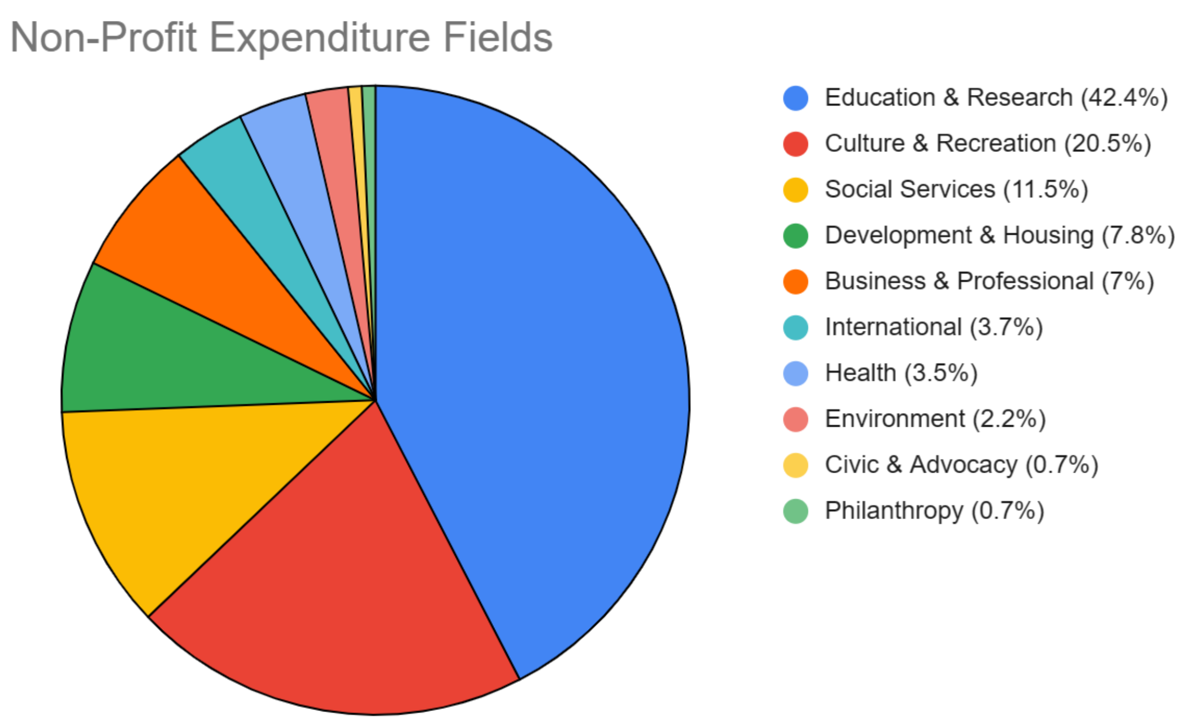

Figure 2 - Expenditures by category in UK non-profits (based on data by Anheier and Salamon (1996)).

Community centers possess intimate knowledge of and connections with their local community, meaning that they can respond quickly to local needs and emerging issues (Izmir et al., 2009, p. 5; Charity Commission, 2004). This makes them an important part of the social infrastructure for communities (Izmir et al., 2009, p. 5; Charity Commission, 2004). These organizations promote civil engagement by encouraging community participation, fulfilling demands overlooked by the government, and providing an outlet where stakeholders can have a voice (Shier et al., 2014, p. 58). The diversity of services provided by these organizations allows them to accommodate the changing needs of the population they serve. This includes catering to a variety of age groups and taking a "cradle to grave" approach (Izmir et al., 2009, p. 2). Through these services, community organizations benefit disadvantaged neighborhoods and support diverse groups of people who need the most assistance. Figure 3 is based on a textual analysis of a historical and literature review conducted by Delmireva (2017). Words commonly associated with community centers included "local," "community," "integration," and "bonding."

Figure 3 - Word Chart Representing the Contents of Delmireva (2017).

2.3 Modern Challenges for Community Centers

Most community centers are funded by grants and contracts with local authorities for service provided to the community and by renting out space to other groups in the community (Smith, 2002). In recent times, costs for running community centers in the UK have gone up while funding for them has gone down—the impact of which is landing on many individual families normally served by community organizations. One major example of the funding disparity is in electricity costs. Figure 4 illustrates the increase in fuel costs in 2022-23 for several community centers (Booth, 2022). Electricity costs are expected to quadruple for these community centers, and it is likely that other centers in the UK face similar increases in costs (Booth, 2022). At the same time, funding for local councils has decreased, meaning that there are fewer available funds in general for community centers to draw on to provide services (Booth, 2022).

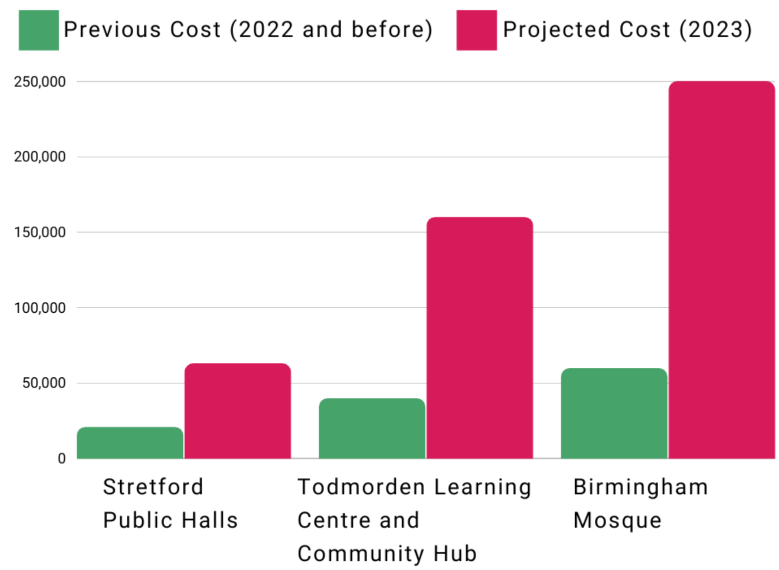

Figure 4 - Projected electricity cost for Community Centers after 2022 (based on data from Booth, 2022).

While funding for local councils has decreased, the responsibility placed on them by the Conservative government to provide services to their communities has increased (Gove, 2023). Secretary of State for Leveling Up and Conservative Parliamentary Representative Michael Gove states he wants to give more power to local leaders to support their measures to “level up” (Gove, 2023). By local leaders, Gove means non-national government actors, such as local councils. As a result, local councils are expected to take on a greater set of responsibilities in providing local services. Many local councils rely on local nonprofit organizations, which they tend to fund, to provide services to the community (Booth, 2022). Therefore, community centers will be expected to deliver more services with fewer resources. Many community centers are unable to continue to deliver services in the face of rising costs (Booth, 2022). In September 2022, 38% of community centers indicated that they are likely to close or significantly reduce services in the next six months, as shown in Figure 5 below (Booth, 2022). Much of the funding for community centers now provides support for those in dire need, which means that some individuals with less immediate needs may no longer be able to access services (Sherwood, 2022). At the same time, the purchasing power of government-benefits claimed by citizens has decreased due to rising inflation (Partington, 2022). In combination with reduced support from local organizations, this decrease in the purchasing power of government benefits means that individual households served by community centers are being hit incredibly hard (Partington, 2022).

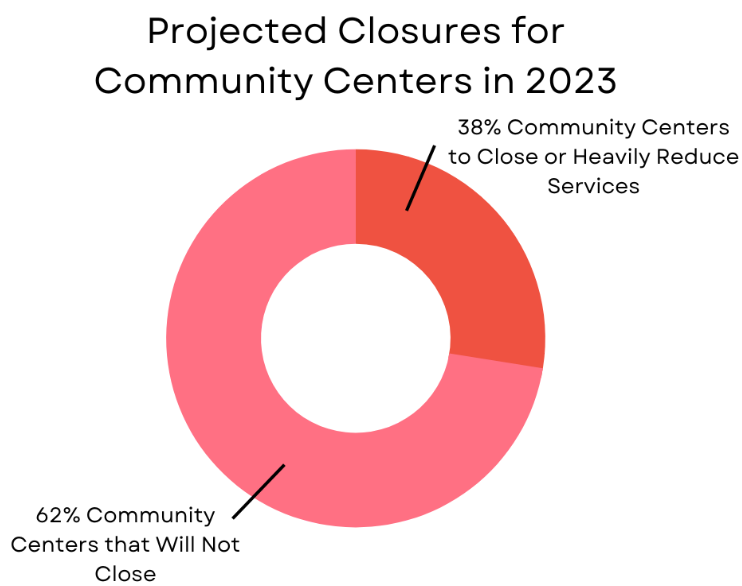

Figure 5 - Chart of electricity cost for Community Centers (based on data from Booth, 2022).

The reduction of funding for community centers provides a new challenge—operating more cheaply and efficiently than before. Izmir et al (2009) conducted a synthesis of best evidence using Australian national and international data on community center impact and challenges. According to Izmir et al (2009), pay rates in the NGO sector have deteriorated internationally in recent years, meaning that fewer employees are attracted to or hired by NGOs. Those employees that are attracted to an NGO are often working out of passion and love for their community (Izmir et al., 2009, p. 32). These hardworking employees are stretched thin and often rely on volunteer support (Izmir et al., 2009, p. 32). For example, a survey conducted in Australia in 2009 by Izmir et al. (2009) found that 31% of total service effort is actually met by volunteers. Based on this, Izmir et al (2009, p.36) surmises that community centers are typically able to deliver services and operate at lower costs than other public service institutions, but they depend on volunteers to be able to deliver their services. We assume that this research reflects international voluntary sector patterns and thus reflects the situation in the UK.

Since community centers currently face increasing financial pressures, they require more efficient methods of operating and generating reports to apply for funding. Administration costs are typically cut by nonprofits in favor of service delivery (Mayer & Fischer, 2023, p. 5; Carman & Fredericks, 2008, p. 59). However, spending more money on administrational costs may have a greater return for nonprofit organizations, particularly community centers, in their long-term strategic planning. This is because organizations can spend on data management systems that can collect and organize data into generated reports, which can then be used to demonstrate efficacy to funding audiences. Demonstrating efficacy to funding audiences can secure the longevity of relationships with funders as well as attract additional sources of funds (Mayer & Fischer, 2023, p. 7; Carman & Fredericks, 2008, pp. 67-68). Additionally, to operate more efficiently, community centers need to understand their most vital functions. For example, community centers must know which of their services reach the most individuals and which individuals are being reached by those services to gauge the efficiency and effectiveness of their community programming. In order to be able to do this long-term, nonprofit organizations need an efficient data management system, such as a Customer Relationship Management system (CRM). The purpose of this project is to help Saint Pancras Community Association in Camden Borough of London to achieve this goal and develop a more sophisticated and user-friendly data management system.

2.4 The Saint Pancras Community Association

In this project, we show how community centers can work to alleviate these modern challenges by helping the Saint Pancras Community Association (SPCA), a community center based in the London Borough of Camden. The SPCA provides a range of services to their local community, and is looking to better manage their data to organize outcomes and automate grant report generation. Improved data management will hopefully increase funding at the SPCA, allowing them to better meet their increased demand for services.

The SPCA is located in Southeast Camden. They primarily serve the neighborhoods of St Pancras and Somers Town Ward, which can be seen in Figure 6. According to the Charity Commission for England and Wales (2023), the SPCA was registered as a charitable company on December 1st, 1999. In 2016, the SPCA moved to its current premises, a multi-purpose community center at 67 Plender Street, in the northern end of the ward (Register of Charities, 2023).

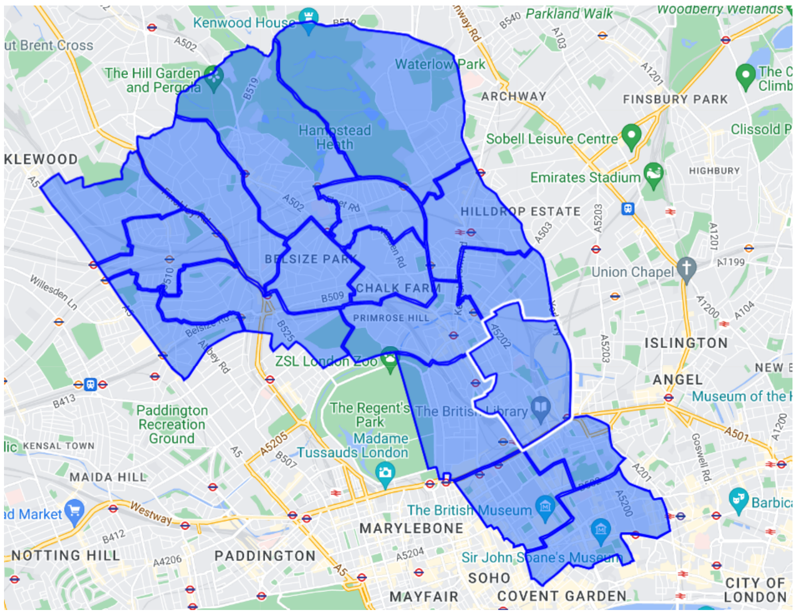

Figure 6 - The location of the St Pancras and Somers Town Ward within Camden.

SPCA offers a variety of services to the local community but is facing increasing demand and budget constraints. These programs primarily serve the elderly and under 5s. Recurring programming includes yoga for the elderly as part of a program called “Golden Years,” a nursery for under 5s, and a community kitchen which provides weekly meals to the community. A detailed profile of the St Pancras and Somers Town Ward and the programs that the Association offers is available in Appendix A.

The SPCA is required to collect and retain certain types of data on their beneficiaries and programs for the local Camden Council, a major funder of the SPCA, and other funding sources. This data includes postal codes, health backgrounds, dietary restrictions, event attendance, and more. The SPCA seeks to improve their system of data management, potentially through the use of a Customer Relationship Management (CRM) system, as it believes it could benefit in many ways, particularly in automating the generation of funding reports, with an improved system.

2.5 Data and Data Management in Nonprofits

Improved data management is essential in helping nonprofits understand their communities, evaluate their services, improve reporting, and attract funding. Data can be used to better understand donor information and profiles, determine if an organization is making the impact they desire, save time, and more (Chou, 2019).

Data concerning those who fund an organization is critical in potentially attracting further funding. Haddad (2021) cites examples of funder data as donor engagement history, giving habits, donor and prospective-donor giving capacity and propensity, and communication preferences. Data related to history, habits, and donor propensity can reveal the likelihood of a funding body to donate at a particular time to a certain service or to the whole organization, and how much will potentially be donated. This way, an organization can target the right donor audience at the right time (Weinger, 2019). It is also useful for an organization to track the outcomes of these grant requests, as that data can show which strategies are most successful at keeping donors and better reach out to potential new funders (Weinger, 2019). In doing so, organizations can better keep current funding and attract new sources of funds.

Funders are more likely to provide support to non profit organizations that can demonstrate their value and success in key areas of interest through evaluative data. Evaluative data includes the number of people served, demographics of those served, level of satisfaction after service, and how these services have impacted them over time (Pittman, 2018). This helps organizations track items like the outcomes of key partnerships and collaborations, along with the role and value added by the organization (Pittman, 2018), which can be reported back to funders (Ibrisevic, 2022). Data can also help find gaps in an organization's area of interest, which can help to improve services (Pittman, 2018). For example, if an organization aims to reach at-risk youth between the ages of 11 and 17 and data shows that they have very few members above the age of 14, then there is evidence that they are not fully reaching their target demographic. Finding ways to fix these gaps can help an organization better achieve its desired impact. Overall, funders are more likely to fund organizations that can illustrate their value to and impact on the community using high-quality data (Weinger, 2019).

Although collecting large quantities of data costs employee time and resources, it can also conserve resources elsewhere and improve overall quality of work and service delivery (Heineman, 2016). The right data can allow an organization to understand what is or is not working. Knowing what is working or not results in a better expenditure of resources and time, as staff members can focus on services and data that are most beneficial to the organization. Data that provides basic information on items like grant details, project details, efficiency, staff capacities, challenges, and lessons learned all help organizations better track what functions are going well and what functions need improvement (Pittman, 2018). A more efficient staffing team can get more done in less time as high quality data can help improve efficiency.

Carman and Fredericks (2008, p. 55) surveyed 189 nonprofit organizations in the United States to learn more about how they use and collect data. Of these organizations, 35% primarily provided social services, 36% primarily provided services to those with developmental or physical disabilities, and 29% primarily provided community development and housing services (Carman & Fredericks, 2008, p. 55). They found that the main data collected by these organizations were program expenditures, the number of people served, other resource expenditures, demographics of those served, participant satisfaction, and program outcomes (Carman & Fredericks, 2008, pp. 57-58). Figure 7 highlights the top ten ways nonprofit organizations used these evaluation data. These data allow nonprofits to improve their programs, establish new goals, find more community members in need, and potentially increase their funding (Carman & Fredericks, 2018, p. 58).

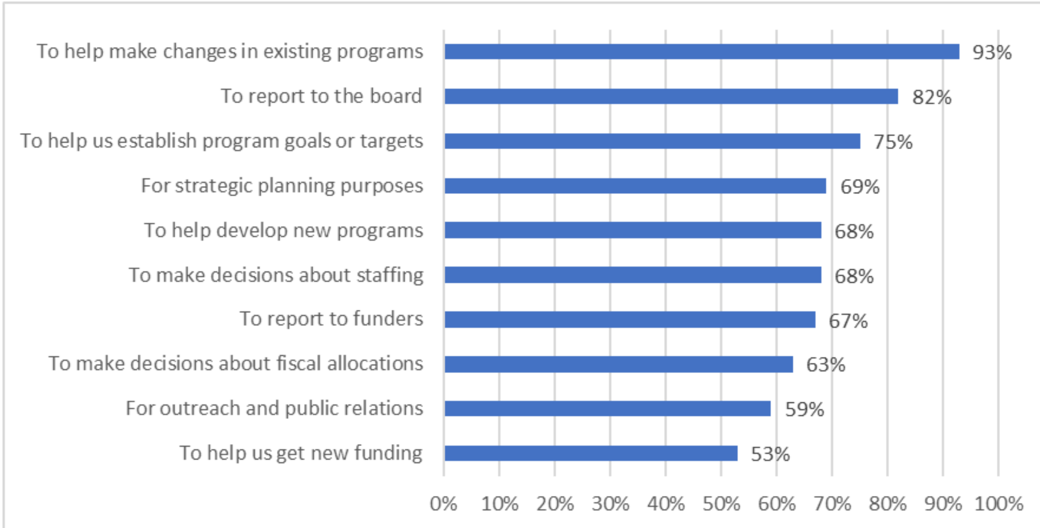

Figure 7 - How NPOs use data (based on data by Carman & Fredericks, 2018, p.59).

2.6 Challenges Faced by Nonprofits When Collecting Data

Much of the difficulty in collecting high quality data for evaluative purposes stems from a lack of staff and resources (Mayer & Fischer, 2023, p. 5-7; Carman & Fredericks, 2008, p. 59). In 2016, Innovation Network, an organization that consults with nonprofits to improve their program and service results, conducted a survey of 1,125 US-based 501(c)3 organizations in order to understand how nonprofits were evaluating data (Innovation Network, 2016, p. 1). Here, "evaluation" refers to tracking and analyzing points of interest regarding program outcomes or budgets (Innovation Network, 2016, p. 2). Of the nonprofits surveyed by Innovation Network, 92% stated that they "evaluated their work" (Innovation Network, 2016, p. 2). However, there are many problems that nonprofits can face while collecting and evaluating data, related primarily to funding which seeps into both employee resource dedication and organizational tools.

A major problem that nonprofits experience in collecting and evaluating data is a lack of funds. Innovation Network suggests allocating 5% to 10% of an organization's budget to data and evaluation efforts (Innovation Network, 2016, p. 5). However, 84% of organizations surveyed spent less than 5% of their budget on evaluation (Innovation Network, 2016, p. 5). This is likely because nonprofits often reduce administrative costs (such as information technology, training, and staff) in order to provide more community services, especially during budget squeezes (Izmir, 2019; Mayer & Fischer, 2023, p. 5).

Another problem that nonprofits face, stemming from a lack of evaluative funds, is that most do not have staff dedicated to data collection and evaluation. According to Innovation Network's survey, only 8% of organizations have any kind of dedicated evaluation staff (Innovation Network, 2016, p. 3). This is because nonprofit organizations have limited funds, so direct service interaction and program administration are typically prioritized over data collection (Mayer & Fischer, 2023, p. 5; Carman & Fredericks, 2008, p. 59). Therefore, managers and employees for programs and services are hired over evaluators and funds that might be allocated towards data management are funneled to service delivery (Mayer & Fischer, 2023, p. 5). As a result, employees who have other primary job responsibilities often haphazardly collect data and fail to use it effectively for program evaluation. For example, an Innovation Networks survey found that 63% of nonprofit organizations have leadership and program staff collect data and perform evaluations (Innovation Network, 2016, p. 8). A survey of hundreds of nonprofits in the United States of America by Nonprofit Hub (2019) revealed that 79% of the organizations stated time constraints as a reason for not fully utilizing their data, likely due to having other primary job responsibilities.

As nonprofits are typically unable to allocate sufficient funds to support data and evaluation efforts, they often fail to implement tools, such as data management systems. Ninety-two percent of nonprofits reported using less sophisticated spreadsheet software to manage their data, while only 58% of nonprofits reported using a database at all (Innovation Network, 2016, p. 16). This corroborates evidence found in other reports that many nonprofits use less sophisticated means of collecting data, such as hand tallying (Mayer & Fischer, 2023, p. 5; Carman & Fredericks, 2008, p. 58). Sometimes, nonprofits collect data using common spreadsheet software like Microsoft Excel, but they fail to use the data for evaluation (Mayer & Fischer, 2023, p. 3; Carman & Fredericks, 2008, pp. 57-59). Often the process of data collection is laborious and difficult to standardize, as employees collect idiosyncratic data which is never entered into a centralized data management system. Instead, staff may develop and follow their own data collection process and store data on personal work accounts that are not accessible to others in the organization. This results in data fragmentation, which makes it more difficult to understand the full array of programs and services provided by a nonprofit organization (Mayer

& Fischer, 2023, p. 3). This lack of standardized and centralized data collection and storage procedures means employees who are already overworked are unable to organize and use the data that they collect for evaluation purposes.

2.7 Evaluation Practices for Nonprofits

Once nonprofits have a centralized system and standardized procedure for data management, they may still struggle to use data effectively or for evaluative purposes. In part, this is because there are few existing frameworks for nonprofit organization evaluation and many of the existing frameworks focus on budgeting and financial efficiency rather than program outcomes (Treinta et a.l, 2020; Moxham, 2010, p. 342; Lee & Nowell, 2014). The reason many focus on budgeting, finances, and profits is that these frameworks are adapted from commercial enterprise models and not created specifically for nonprofit organizations (Treinta et al., 2020; Moxham, 2010, p. 342). Frameworks for evaluation are known as "performance measurement systems" (PMS) and generally define the procedure and strategy used by an organization to measure and thus achieve its organizational goals (Treinta et al., 2020). These systems are considered "strategic" when they account for long- and short-term organizational planning and are used to make organizational choices regarding service delivery and budget (Treinta et al., 2020). Effective evaluation practices for nonprofits require data collection, management, and use.

Commercial enterprise models for evaluation focus on profit generation, which does not accurately reflect the goals of nonprofit organizations (Treinta et al., 2020; Moxham, 2010, p. 342). Nonprofit organizations have very different organizational goals from commercial enterprises thus their strategic framework must measure and evaluate different factors (Treinta et al., 2020; Moxham, 2010, pp. 342-343). Generally, nonprofit organizations pursue social value for their audience, which may include beneficiaries, funders, and other relevant stakeholders, whereas for-profit organizations seek to make money off their audience (Treinta et al., 2020; Moxham, 2010, p. 343). Nonprofit organizations also seek stakeholder feedback to incorporate stakeholder interests, which they tend to serve, in their strategic planning (Treinta et al., 2020).

Treinta et al. (2020) conducted a literature review which analyzed pieces related to nonprofit performance measurement systems and frameworks to understand what factors are relevant for nonprofit PM systems. Through this review, Treinta et al. (2020) found three main categories which influence nonprofit PM systems, including "social" factors, "stakeholder" factors, and "management" factors. Figure 8 below shows the factors emphasized by strategic planning for nonprofits as found by Treinta et al. (2020). The social section demonstrates that nonprofits focus on evaluative measures which measure impact on beneficiaries (Treinta et al., 2020). The stakeholders section focuses on evaluative factors which determine what kind of image nonprofits have to stakeholders (Treinta et al., 2020). The managerial section includes factors that are largely related to how well resources are allocated as compared to the effectiveness of programs (Treinta et al., 2020). These represent important factors for nonprofit strategizing which can be quite different from the factors that commercial enterprises focus on.

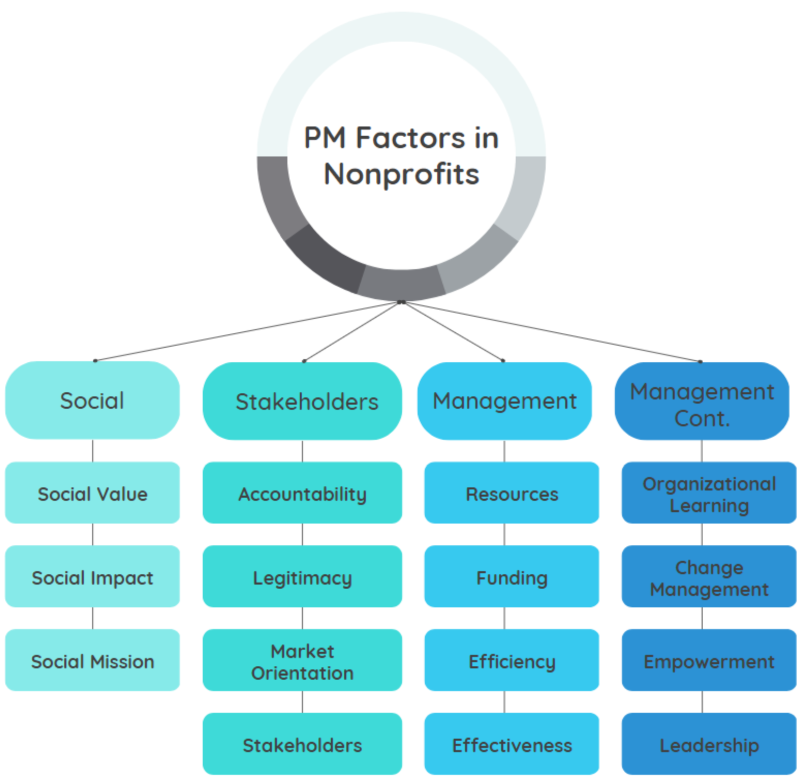

Figure 8 - Framework for factors that influence performance measurement for nonprofits (based on Treinta et al., 2020).

A major problem in the nonprofit sector is a lack of attention to and focus on performance measurement options for nonprofit organizations (Moxham, 2010, p. 343). Often, nonprofit organizations collect data to respond to funder demands and requirements (Innovation Network, 2016, p. 4). Eighty-six percent of nonprofit organizations interviewed by Innovation Network stated that responding to funder demands is a moderate to essential priority for collecting data and conducting evaluation efforts (Innovation Network, 2016, p. 4). Ninety-three percent of organizations report the results of their evaluation to funders (Innovation Network, 2016, p. 11). As such, many frameworks that have been adopted for nonprofit organizations focus on the financial sustainability of programs as compared to effectiveness and impact (Treinta et al., 2020). Therefore, frameworks mainly measure financial efficiency (Treinta et al., 2020). “Accountability for financial resources” is a “key driver” for nonprofit organizations in measuring their performance outputs (Moxham, 2010, p. 344). To compete for funds with other nonprofits, nonprofit organizations must demonstrate “value for money” and financial accountability (Treinta et al., 2020; Moxham, 2010, p. 342-344). Therefore, much of the evaluation and data tracking that is performed by nonprofit organizations focus on where the budget is going rather than how a program is performing.

Since there is a lack of frameworks developed for nonprofit organizations as compared to commercial enterprises, there remains a lot of room in the field for the development of nonprofit-focused strategy. As is the case with data collection in general, lack of resources and employee training serve as barriers to performing program evaluation. In the future, more funders will generally require evaluation findings to be used in grant-making decisions as the rate of growth in the nonprofit industry increases and funding remains relatively the same (Treinta et al., 2020; Moxham, 2010, p. 350). Therefore, these evaluation procedures become more relevant in the coming years.

2.8 Customer Relationship Management Systems

To address challenges on community centers raised above, such as a need for tracking beneficiary data and funder report generation, without placing strain on employees, community centers can use a Customer Relationship Management (CRM) system. Automation of beneficiary tracking and program evaluations can help nonprofits receive additional funding without costing high amounts of employee time. CRMs are an increasingly important software for community centers, but the process of understanding and selecting a system can be overwhelming.

2.8.1 What is a CRM

In general terms, Customer Relationship Management (CRM) focuses on the application of relationship marketing (Gummesson, 2002, as cited in Arab et al., 2010). Customer Relationship Management Systems exist to manage the relationship between the organization and the customer to improve customer satisfaction by tracking customer data. CRMs are typically cloud-based, since the Web is an increasingly critical aspect of customer management and business today (Frankenberg, 2000). For employees, this looks like a profile for each patron that can be easily accessed as needed, as well as pages that show data related to specific initiatives. Tracking customer interactions with the organization using a CRM allows employees to find the customer information easily and improve services (Pohludka & Štverková, 2019).

A CRM gives organization leaders a clearer picture of how patrons interact with the organization's services and allows them to follow up with customers more effectively (Elfarmawi, 2019, p. 31). For nonprofits, a CRM can prove useful in tracking attendance, demographic information, and feedback from patrons that can help them improve services and show funders the good work they do. In the commercial sphere, this data management tool can be used by marketing and sales executives to better understand the needs and history of their customers (Bullock et al., 2019). Our project focuses on how CRMs can work to support nonprofits. In this use case, the "customers" are the organizations' beneficiaries, funders, and other stakeholders. CRMs help to support sustainable and long-term relationships, adding value for both the company and the customer (Arab et al., 2010).

2.8.2 Effectiveness of a CRM

Since the majority of CRM systems have been created to assist commercial enterprises rather than nonprofits, it is difficult to find CRM literature and research that tracks their use and effectiveness for nonprofits. For this reason, much of the following research is based on the use of CRMs in commercial enterprises. Despite the lack of literature on this topic, there are many emerging CRMs built specifically for nonprofits and nonprofit use of CRMs has become more widespread (Crawley, 2020). Figure 9 shows that it is typically the larger nonprofits in the UK (i.e., £1 million or more in income) that currently use CRMs to help manage their data.

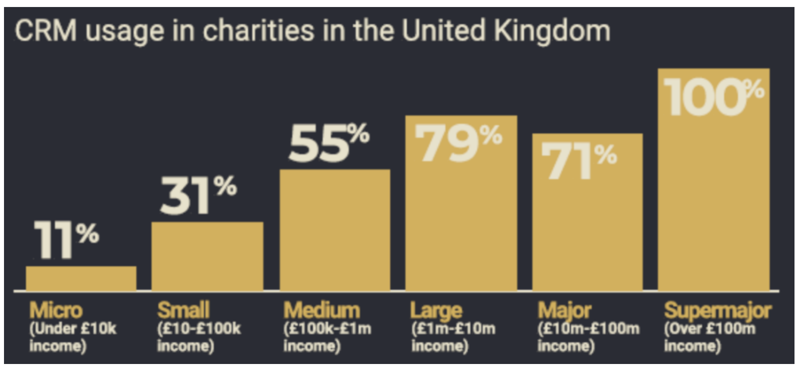

Figure 9 - CRM Usage in Charities in the UK (Salesforce, 2022).

When using a CRM well and with dedication, it can be worth the investment. A Nuclear Research report from 2014 showed that, for commercial ventures, an average of \$8.71 would be returned for every \$1 invested in a CRM (CRM Pays Back \$7.81, 2014). This was an increase from the \$5.60 of the same study run in 2011 (CRM Returns \$5.60, 2011). A case study of the CRM company Ometria shows that most of the value gained for their commercial partners was in increased revenue from more personalized connections with customers, with smaller but substantial savings due to increased efficiency of employees and removing outdated tool costs (Ballard, 2023, p. 8). Although nonprofits do not focus on monetary gains from sales, they can benefit from increased funding and increased numbers of patrons in their organization; CRMs can help them reach these goals. Additionally, the increased efficiency of their employees will be valuable, allowing them to use the saved time to contribute to the mission of the organization.

2.8.3 Potential Pitfalls

Although CRMs have the potential to yield positive results for many organizations, they come with challenges including a lack of employee technical ability and resources for technical support. The following section will explain a case study in which this was exemplified.

Worcester Polytechnic Students implemented a CRM for the Somali Youth Development Resource Centre in 2020 (Reiser et al., 2020). The CRM chosen was *Views*, which has videos and training webinars listed on its website in order to aid employees and administrators in implementing the software (Substance, 2023). However, a study conducted by Worcester Polytechnic Institute (WPI) students two years later in 2022 followed up with the SYDRC, providing evidence that these resources are insufficient for effective employee training (Dzwil et al., 2022, p. 9). This second group of students performed an analysis of issues the small nonprofit organization faced while using *Views* and implemented strategies to make their use more effective (Dzwil et al., 2022, p. 1). Although employees did use *Views* to track and summarize some data, they were unable to use the application to its full potential and fully transition to using *Views* as their only data management system until students came in to implement formal training measures (Dzwil et al., 2022, p. 9). The authors stated the reason was mainly due to a lack of technological competency on the part of the organization's staff and a lack of training and support from Views. As discussed earlier, a lack of technological and analytics skills in nonprofit staff tends to be a challenge in data management system implementation. In the WPI study, the authors implemented training techniques to ensure that organization staff and volunteers would be able to use *Views* to its full potential. To do this, they suggested that in order to implement *Views*, staff need more support than is provided by the creators, *Substance* (Dzwil et al., 2022, p. 10). Although this is a specific example, it contributes to a mass of evidence that demonstrates that CRMs can be difficult to implement for nonprofit organizations due to lack of employee technical expertise.

2.8.4 Criteria Used in Selecting a CRM

With the variety of CRM systems on the market, using a list of criteria can help narrow down potential options. Different companies have varying needs, and one CRM may work for a larger corporation, while not meeting the requirements of a grassroots organization. For a company to choose which CRM vendor best fits, Friedrich and Breitner (2012) and Lee et al. (2014) outline criteria that can be classified according to four categories: functional criteria, technical criteria, quality criteria, and cost criteria (Cricelli et al., 2020). These categorizations are described further in Figure 10.

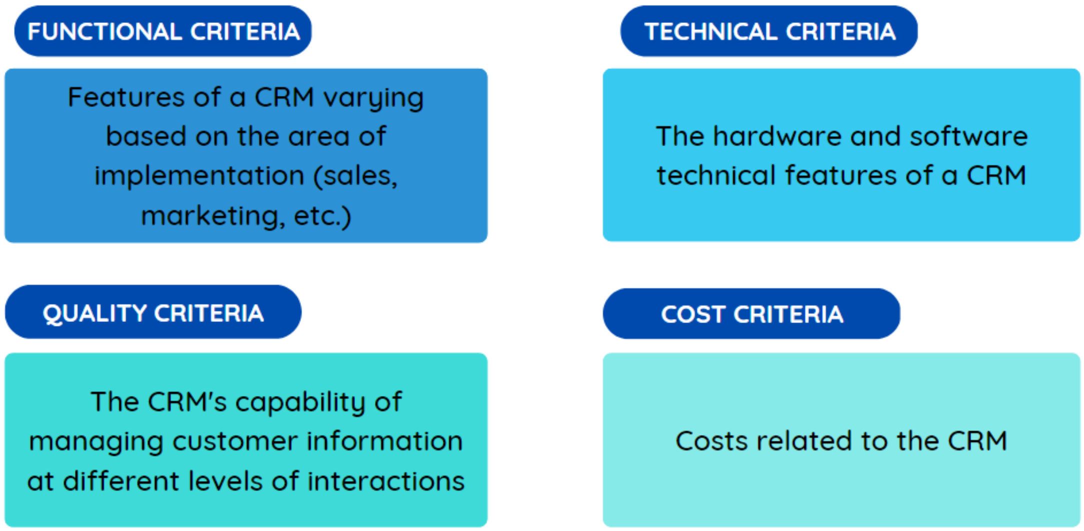

Figure 10 - Criteria used to select a CRM, broken down into four categories (based on Friedrich & Breitner, 2012 & Lee et al., 2014).

Understanding both the benefits and pitfalls of CRM selection and implementation is important to ensure the longevity of a system at an organization. Deciding which system is best is a challenge, with the various options on the market and specific requirements in a CRM that a company is looking for. The criteria outlined in Figure 10 can be used to narrow down potential CRM system options and guide the selection process.

2.8.5 Examples of CRMs

There are a variety of different CRM providers on the market. Although most of them provide relatively similar features, there are variations in appearance, cost, technical support, and customizability. For the purposes of this paper, only CRMs which cater to nonprofit organizations in some manner will be presented.

Substance Views is a CRM made with nonprofits and social purpose organizations in mind (Substance, 2023). Their website states that they created the product with both "front-line staff" and "CEOs in mind" (Substance, 2023). For €980 a year, organizations receive the entire *Views* package (Dzwil, et al., 2022, p. 5). The CRM has four distinct sections, including "contacts," "work," "evidence," and "intelligence":

1. Contacts: This section serves as a location in which person-related data can be stored—including information on employees, volunteers, and stakeholders, such as community members (Substance, 2023).

2. Work: This section is a location in which program data can be collected (Substance, 2023).

3. Evidence: This section enables data collection through questionnaires and surveys (Substance, 2023).

4. Intelligence: This section brings the previous three sections together for statistical summary generation (Substance, 2023).

Overall, *Views* has many features that nonprofits could utilize to better manage their data.

Another CRM option is HubSpot, which caters to nonprofit organizations. It is a free system that has optional premium features and offers a free demonstration that could be used to determine its compatibility with prospective clients. HubSpot offers over 50 free features, including tools to assist with marketing, customer service, sales, CMs, and operations (HubSpot.com, 2023). There are optional premium features, allowing clients to choose the package that fits their needs best. In terms of financials, a direct account from an industry contact reflected on a time in which their client was "tied to contact pricing a non-starter for larger companies" (Murphy et al., 2015, p. 4). The contact described how, in those cases, "HubSpot has been flexible on pricing and coming up with creative ways to work with [them] and those larger customers" (Murphy, et al., 2015, p. 4), demonstrating that HubSpot's management team is willing to work with prospective partners to meet their needs. HubSpot remains a strong contender for many nonprofits considering a CRM.

Another option that serves nonprofits is EveryAction, a CRM that aims to make fundraising and data management streamlined and effective. EveryAction focuses on donor tracking rather than beneficiary tracking. EveryAction is the fastest-growing and second-largest software company for nonprofits, with a large team of engineers to optimize innovation and improve their features (EveryAction, 2023). According to the Spring 2021 Nonprofit CRM Software Customer Success Report, EveryAction received the “Market Leader” Award, meaning they have the highest ratio of company size to customer reference content, content quality score, and social media presence (PRNewswire, 2021). This demonstrates how their growth and success is being recognized in comparison to other nonprofit CRMs. In 2020, EveryAction acquired Mobilize, an “in-class events and supporter engagement platform that connects mission-driven organizations and their supporters” (PRNewswire, 2020). This growth shows that EveryAction is determined to bring more capabilities to its customers. As a well-established platform, it is a viable option for nonprofits.

2.9 Conclusion

Much like other nonprofits, community centers are struggling to provide additional services and reach greater numbers of beneficiaries with less money. Better data collection and management can help in these efforts and create a greater understanding of the demographics and needs of the communities they serve. Increasingly, nonprofits are using CRMs to handle their data more efficiently and effectively. Identifying the best CRM to meet organizational needs is a daunting task, as these centers provide important services but have little funds to do so. This project is designed to determine the SPCA’s needs and the kinds of data management systems, including CRMs, that might best meet these needs.

3. Methods

The goal of this project was to identify strategies and software that might be used to better manage the collection, maintenance, and analysis of the SPCA's organizational data. We identified the following four objectives to achieve this goal:

(1) Determine the data management needs and preferences of the SPCA staff, volunteers, patrons, and other stakeholders (such as members of the board of trustees and outside funders)

(2) Evaluate current and best practices in the management of customer data by other community organizations, particularly as it relates to funding practices

(3) Assess the advantages and disadvantages of different types of customer relationship management (CRM) systems, including freeware and commercial options, used in the voluntary services section

(4) Provide a roadmap for short to long term data management and begin implementing early phases.

Below, Figure 11 maps out objectives and tasks for the project term. This project was conducted at the Worcester Polytechnic Institute's London Project Center over a seven week period from March 13th to April 29th, 2023.

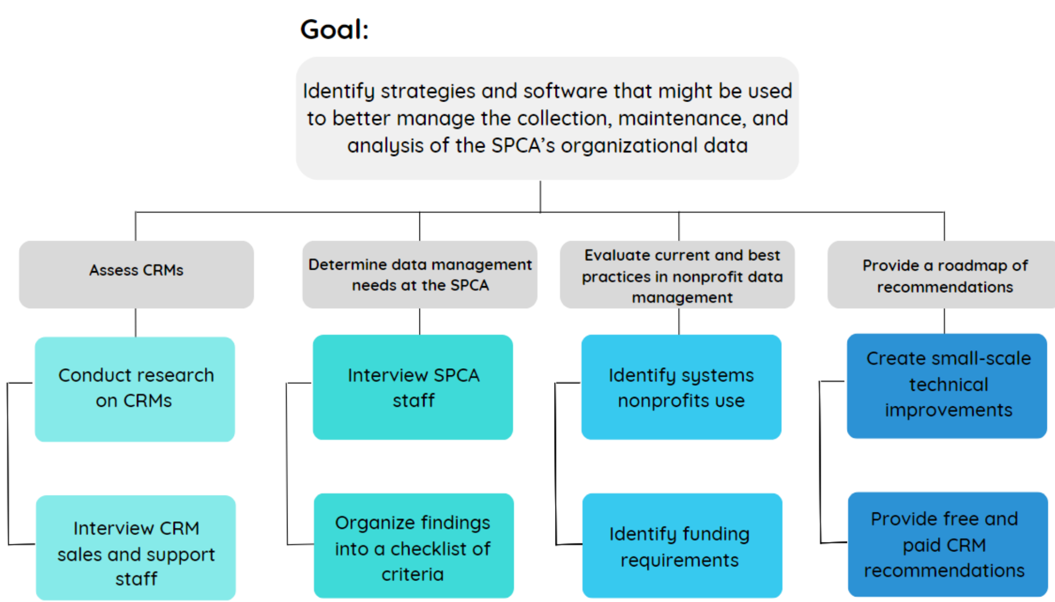

Figure 11 - Task Objective Mapping.

3.1 Determine the SPCA's Data Management Needs

Originally, we planned to distribute a survey, hold focus groups, and conduct interviews with SPCA staff to determine data management needs. After we arrived on site, we discovered that there were only six employees that work with data, so we decided to dispense with the survey and focus groups. Instead, we interviewed staff one-on-one to determine the kinds of data being collected at the SPCA and from whom, the format and storage location of the data, and the needs of the SPCA staff in a new data management system.

Over the course of four days, our group interviewed 5 employees with different positions at the SPCA. At the beginning of each interview, we explained the purpose of our research, and we solicited consent from our interviewees by using a script that complied with the UK General Data Protection Regulations (see script in Appendix B). We asked interviewees questions about their roles and history with the SPCA, their interactions with data in their position, and their current understanding of the purposes the data collection serves. One team member led the interview while the other members took notes. The full interview script can be found in Appendix C. After all interviews were completed, an optional anonymous form was emailed to each participant in the event that they had additional comments or concerns they did not feel comfortable sharing with us in-person.

We analyzed the answers from each interviewee and sorted them into four categories: advantages of the current system, disadvantages of the current system, desires for the new system, and essential features and functions that should be carried over into the new system. We coded the data, as illustrated in Figure 12 to aid analysis.

Cons of current system Disconnected System Not Intuitive/Automated Other	[redacted] Made for commercial businesses and uses commercial terms [redacted] Hallmaster and Google Calendar are not connected, need to do more scheduling manually [redacted] Bookings are replicated four times (google calendar, hallmaster, hard copy, another copy saved to google drive)--too many places data is stored Hallmaster is unintuitive and requires users to register before checking availability [redacted] After data is collected with membership form, it needs to be digitized using excel spreadsheet Database is not easily updatable [redacted] Having to essentially create their own system Frustrating that everyone uses a different system **SUMMARY OF MAIN POINTS:** - Want one central connected system that everyone can access - Want an intuitive and updatable system that is easy to use

Figure 12 - Example of coding interview results and the summary of main findings.

3.2 Evaluate Current and Best Practices in the Management of Customer Data

Our second objective was to evaluate current and best practices in the management of customer data by other community organizations. Camden Council lists 25 community centers and more than 4,000 organizations in its local community information database called Cindex (https://www.camden.gov.uk/cindex1, retrieved 2023). We consulted with staff at the SPCA to identify a short list of organizations that have similar data management needs as the SPCA, based on the type of organization and on its programs, activities, and infrastructure. We also conducted interviews with representatives of four local nonprofit organizations to learn more about their data management solutions. We also spoke with one funding body to understand which data they wanted to receive when deciding how to distribute grants.

We developed a preliminary set of questions prior to arriving in London that evolved once we learned more about the SPCA’s data management practices and needs. The general set of questions can be seen in Appendix D; there are slight differences in the questions asked, based on our research about each community association. We followed the same protocols as for our SPCA staff interviews, including the consent script in Appendix B.

3.3 Assess Advantages and Disadvantages of CRMs

We assessed the advantages and disadvantages of different customer relationship management (CRM) systems through background research, which was supplemented by interviews with developers and sales staff of the systems. Based on our research and needs assessments, our team identified eight systems: (1) Salesforce Customer 360 (Salesforce.com), (2) Substance Views (Substance.net/views), (3) HubSpot (Hubspot.com), (4) Insightly (Insightly.com), (5) EveryAction (Everyaction.com), (6) Donorfy (donorfy.com), (7) Beacon (beaconcrm.org), and (8) Time to Spare (timetospare.com). We developed specific criteria related to the SPCA’s needs and requirements in a system. This allows us to assess the positives and negatives of features in a CRM that were most valuable to the SPCA, as many CRMs may have advantages to them that the SPCA will not need. Assessing systems in this way allowed us to find and recommend a CRM that best fits the organizations and its needs.

3.4 Provide Data Management Recommendations

Based on the information found from interviews and research, we planned to recommend a system to the SPCA. Our team developed specific criteria and features that would be needed for the CRM chosen, and we used this information and the advantages and disadvantages of each system to pick a CRM to recommend. We decided to recommend two different CRM systems to the SPCA, one that is free and another that requires payment. This gave the SPCA multiple options at different price points, as the affordability of the system was an important aspect during this recommendation. We also decided to create documents that explain why we chose these systems and the differences between the two chosen. This would allow the SPCA to understand why we recommended these CRMs and learn more information about each.

4. Findings

In this section, we discuss project findings from our research and interviews. First, we report the results of assessment of the data management needs of the SPCA based on staff interviews. Second, we provide the results of our nonprofit and funding interviews which suggested potential recommendations for changes the SPCA can make to their data collection methodology and management. Third, we summarize our findings from research on CRMs and interviews with CRM companies. Fourth, we present research on short-term technical solutions for the SPCA.

4.1 Data management requirements for the SPCA

The findings below were collected during a series of five interviews with SPCA employees. In this section, we will summarize our two findings: first, the kind of data collected by SPCA employees; and second, the employees' process for data collection.

4.1.1 Data collected

We asked SPCA staff members which kinds of data they collect for their role. Each interviewee collects different types of data according to the needs of their programs and stores that data in a different location, as shown in Table 1. The first column describes who at the SPCA collects certain data. The second column presents the purpose the SPCA staff member gave for the data. The third column describes types of data collected according to purpose. The fourth column indicates the format for collection and storage of the data. This data was used to create the needs checklist discussed in the methods chapter, which we then used to evaluate CRMs.

Who Collects It	**Purpose**	**Data Collected**	**Where it is Stored**
Nursery Manager	For child's care at nursery	Children's diets, immunization, outside agencies that work with children,	Paper form

		health status/special needs	
	Demographic data	Family background, postal code	Paper form
	Parent data	Parent contact information (email, phone number)	Paper form, Excel sheet, collected during registration
	For funding (government)	Letter from parents, DOB	
	Program data, evaluation-based data (government required)	Initial observation of child to assess developmental status, continuous observation of child to assess status	Paper form in filing cabinet
	Program data, evaluation-based data (not government required)	Feedback questionnaires given to parents	
Golden Years Manager	Demographic data	Names, DOB, postal code	Excel, collected during registration as paper form then digitized by manager
	Contact information	Email, phone number, emergency contact	
	Emergency data	Emergency contact, health background	

	Program data, evaluation-based data (funder required)	Program satisfaction based on verbal feedback and “smiley-face” surveys, number of attendees weekly and at events (not names of attendees)	Paper form
Financial Officer	Supplier data	Names, addresses	Quickbooks
	Data intended for program funders	How much funding was allocated to program, where the funding was used	Google form filled out by employees then used by financial officer
	Employee data	Names, contact information, amount paid	Quickbooks, collected at employment
Premises Manager	Building visitors tracking, used in case of emergency building evacuation	Name, time entering, time exiting, reason for visiting	Paper Form
	Bookings/”hall hire”	Booking organization, time/date, amount paid, whether they have paid, add-ons requested	Kept in four separate locations simultaneously (Hallmaster, Hard copy for caretaker, Google Calendar, Google Drive)

	GDPR adherence	What data is collected, why it is collected, where it is stored	Google Sheets
Administrator	Newsletter subscribers	Users subscribed to newsletter, contact information	Mailchimp

Table 1 - Data collected by the SPCA organized by type, purpose, and location stored.

As Table 1 shows, the nursery manager collects greater and more varied data than other employees at the SPCA. Much of this is due to government regulations and requirements, as the nursery works with children in an educational setting. The nursery is required by law to gather more evaluative data than other programs at the SPCA. This evaluative data is related to the development of the children that the SPCA's nursery serves, and it is collected regularly to comply with government regulations.

We found that the program that collects the second-most data is Golden Years, which must track a large amount of data related to Golden Years members. A majority of SPCA events are Golden-Years-affiliated, so much of the attendance data collected by the SPCA is collected through these events. As seen in Table 1, Golden Years collects evaluative data. However, it is important to note that this data is collected on an ad hoc basis only when required by funders. It is used to confirm that programs are successful for funders, but it is not qualitative or extensive enough to influence changes in programs or services provided by Golden Years. It is collected in the form of verbal feedback and conversations with event attendees, which is not officially recorded, or it is collected using "smiley-face" surveys. These surveys ask attendees to rate the service or event based on a scale of unhappy to happy smiley-faces. Therefore, it cannot be used to easily enact substantive changes to programs.

We found that another major area of data collection for the SPCA is in their sign-in/sign-out sheet. This information is held in the "Premises Manager" section of Table 1. The sign-in/sign-out sheet collects the visitor's name, visit purpose, check-in time, and check-out time. The purpose of this sheet is to understand who is entering the building and why, and also to take attendance in case of an emergency in the building.

All data in Table 1 is considered beneficiary data besides data collected by the Financial Officer. This means that it is data directly related to the beneficiary (i.e., the person receiving services from SPCA). This data is stored with the beneficiary name. Therefore, it is not anonymous data. Figure 13 shows a summary of all data collected by the SPCA that can be categorized as beneficiary data. By interviewing employees, we discovered barriers to accessing and organizing this data as a result of the SPCA's current system of data management, which we will discuss in the following section.

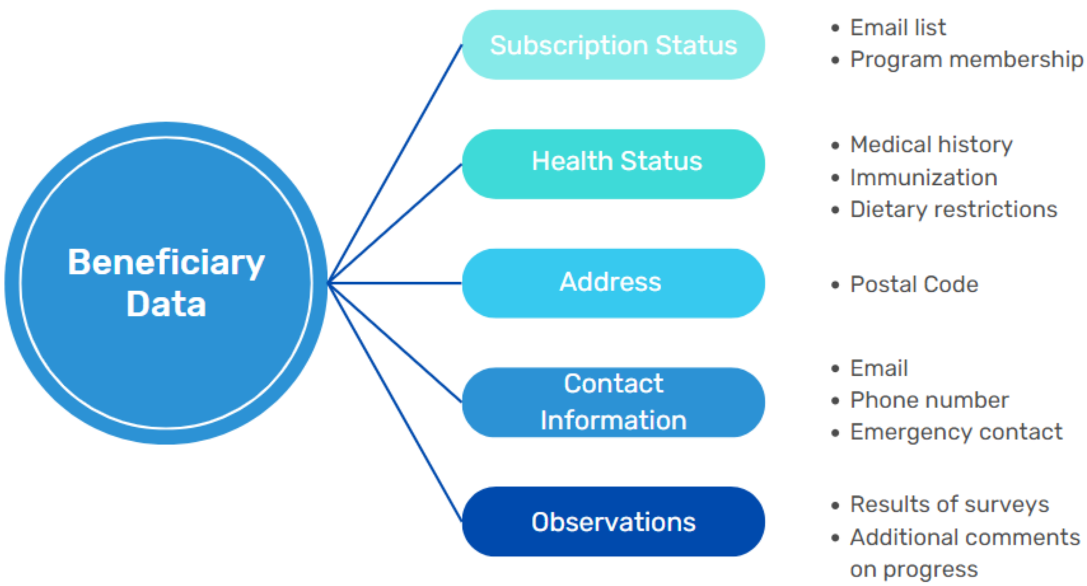

Figure 13 - Data collected by the SPCA which counts as "beneficiary data".

Another major finding during our interviews was that the SPCA does not currently collect ethnicity data or other potentially relevant demographic data. When asked why the SPCA fails to collect this data, interviewees' responses mainly indicated that it is because funders do not require them to do so. A member of staff reported that the SPCA had been collecting ethnicity data but stopped because funders required less data during the initial onset of the COVID-19 pandemic. Another member of staff reported that their current funders have not required ethnicity data, so they have not recorded it. This demonstrates that the SPCA's main purpose in collecting data is often to meet funding requirements— a general theme for community organizations that continued in our subsequent interviews with other nonprofits.

Other community organizations collect data on ethnicity because their funders require it. If the SPCA were to collect data on ethnicity, they may be able to use it to apply for additional funding.

4.1.2 Process of Data Collection

We asked interviewees about their process for data collection, including what worked well in this process, and what did not work well. Overwhelmingly, interviewees stated that little to nothing worked well in their current process. This section will focus again on the nursery, Golden Years, and the sign-in/sign-out process, as these are the main areas of data collection for the SPCA. While there are other ways in which data is collected, organized, and used at the SPCA, we focus in this section on these examples because they generally illustrate the overall processes at the SPCA.

The nursery collects registration data when children first join the nursery. This data is collected using paper forms that parents fill out. This information is kept on paper forms and stored in this format in a locked drawer. The main problem we found with this system was that much of this data needed to be accessed regularly, particularly on specific children, but it is difficult to sort through this data while in paper form. We asked the nursery manager to walk us through this process, which is depicted in Figure 14. As this figure shows, when the manager requires specific child data, they must go to the reception office where they store this data, unlock the drawer which is locked to maintain privacy for children's data, then sort through paper forms in the file in order to find the correct child. This was described to us as a time intensive process. We asked whether a digitized version of all paper forms would prove useful to the manager, and they responded that they had concerns that internet connectivity problems would make files inaccessible.

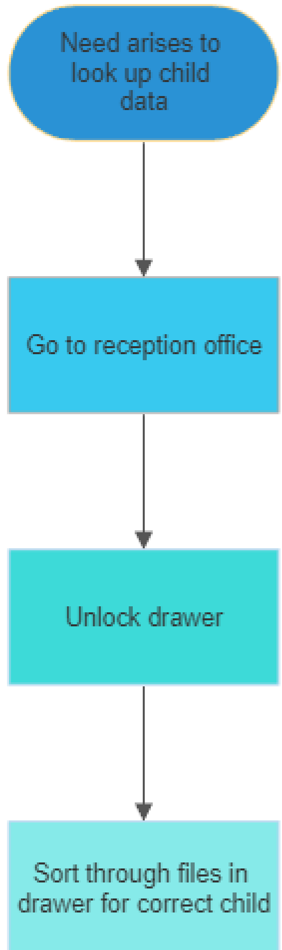

Figure 14 - Process of finding children's data for the nursery.

The process of collecting Golden Years registration data is demonstrated in Figure 15. Golden Years collects registration data either via an online form (which is not often used) or via paper forms. In both cases, the Golden Years manager then enters this data manually into an Excel sheet. The original paper copies are locked in a drawer.

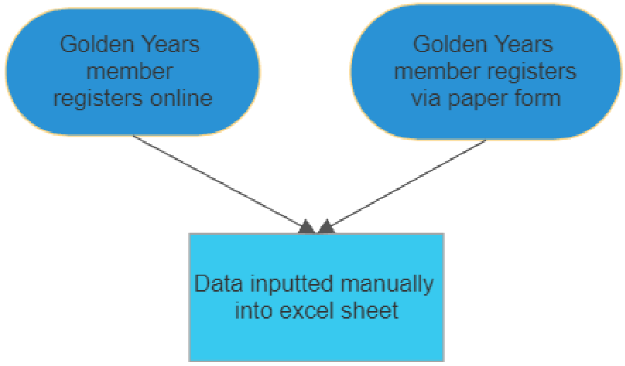

Figure 15 - Process of collecting registration data for Golden Years program.

Figure 16 walks through the process of collecting visitor data at the SPCA. Visitors sign-in on a paper sheet when they walk into the building. They provide their name, reason for visiting, and their check-in time. When they leave the building, they provide their check-out time. SPCA staff keep these paper forms in a filing cabinet in case they need to be referenced later.

Figure 16 - Process of collecting visitors to the SPCA's building.

Since the sign-in form is written, visitors do not necessarily need to include a first and last name or a detailed reason in the way they might on a digital form with required fields. Figure 17 is an image of an example of the data we provide when we sign-in to the building. As seen in Figure 17, we were told to write one of our names plus three in the name column. In the reason column, we were told to provide the room that we were going to be in, which was usually "Meeting Room 2." In the third column, "time-in," we provide the time we entered the building and, in the fourth column, "time-out," we provide the time we exit the building. It is a relatively informal process and is reflective of many of the data collection processes at the SPCA.

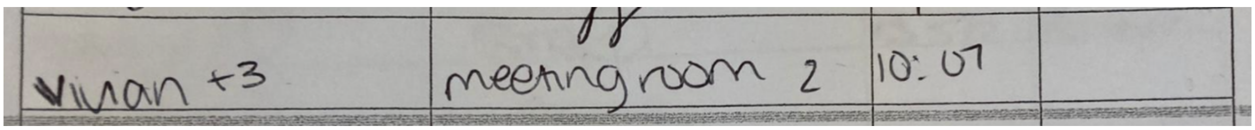

Figure 17 - Example of data collected when visitors enter the building.

A challenge presented by paper form systems, as reported by employees, is difficulty actually using collected data. Multiple paper forms may be used for certain events or for sign-in/sign-outs into the building, which means that multiple papers must be sorted for a single event or day. Additionally, much of this data is not digitized and instead is simply put into a filing cabinet and forgotten, so the likelihood of it being used decreases. This likelihood is confirmed by interviews we conducted with SPCA staff, in which many reported that little of the data they collect is actually used. The staff also reported that the data they collect is laborious to organize and to generate graphs from for funders, as it is not in a centralized location and not digitized.

The lack of centralized data storage or use is prevalent in event attendance tracking at the SPCA. The process of event attendance tracking can be seen in Figure 18. Because volunteers at the SPCA track event attendance differently—typically just through counting the number of attendees at an event—little can be done to track who is attending the event and thus who is being served. Therefore, it is difficult to evaluate the success of programs. It is also difficult to track SPCA members' journeys through the SPCA because employees do not know which events they have attended and because few to no surveys are conducted later on to confirm whether events have had impact on them. A reported part of the reason that little is done with the data collected from these event attendance registers is that the data is not standardized.

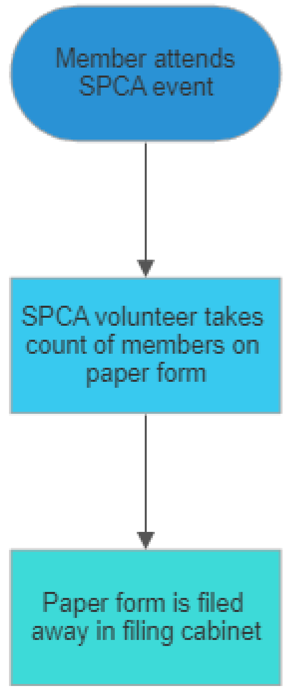

Figure 18 - Process of event attendance tracking at the SPCA.

The SPCA may not use this specific data—and more data in general—as much as it could because it lacks employee resources, particularly time, to dedicate to evaluative and data collecting efforts. All employees reported having a myriad of responsibilities, often overseeing an entire program while taking large part in running services. One employee, when asked, said that the "time element" was the greatest hurdle in completing evaluative efforts, and that they would like to do it if they had time. They reported that they do not prioritize evaluative efforts over actual service delivery, so they only perform them when required by funders. The statements of staff surrounding lack of time are reflected in our background section, which discusses how a lack of employee time is a major reason for a lack of data collection and a lack of evaluative efforts at nonprofit organizations (Section 2.6). Innovation Network (2016, p. 8) suggests that an employee role dedicated to maintaining data collection and evaluative efforts at nonprofits is often necessary to ensure employees follow-through on these processes.

4.1.3 SPCA Requirements for a Data Management System

By interviewing employees at the SPCA, we identified eight data management requirements that we use throughout our CRM evaluations. A list of the eight requirements can be found in Figure 19. As we explored these CRMS, we used a checklist to account for various features and to confirm whether or not a CRM would meet the needs of the SPCA. We present below our overall list of features in a checklist form (Figure 19).

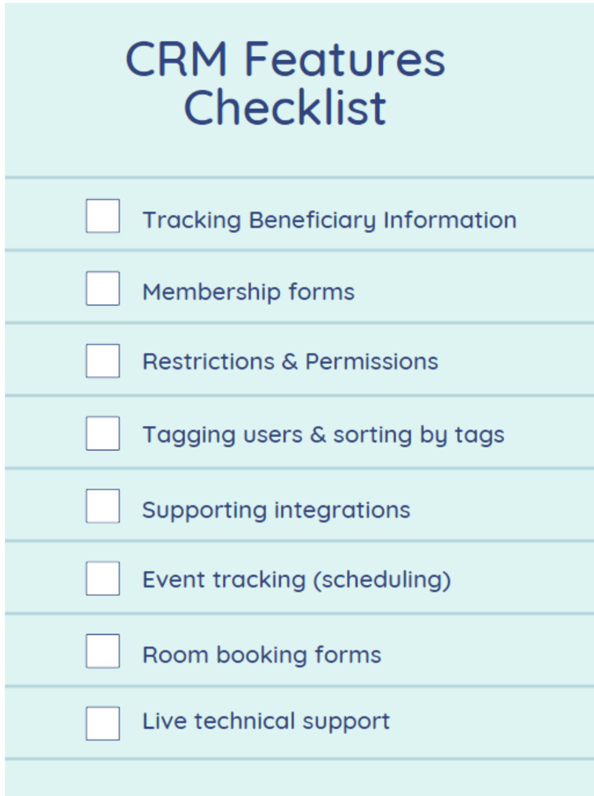

Figure 19 - Checklist of Eight Requirements for Evaluating CRMs.

Main Requirement: Centralized System of Data Management

We asked employees what challenges arise from the current system of data management. One problem identified was that all data was not in the same place or collected using the same process. This makes data distribution and use across the organization complicated and results in data fragmentation.

For example, data for certain events or programs are not consistently tracked in the same way, so a continuous picture showing the beginning of a program towards the current state of the program cannot be made. This makes evaluative efforts difficult. Additionally, it means that data is replicated in multiple places. The problem that arises with data duplication is that data must then be corrected in multiple places. Otherwise, data may be taken from an outdated source. The registration system illustrates this problem. Because there are multiple places that registration data is held, member information exists in multiple locations. If contact information needs to be updated, then it needs to be updated in multiple locations. This is a laborious process which can also be subject to error, as data may not always be updated correctly in all locations. Therefore, employees would like a centralized system of data management which all employees use and which will house a single copy of data.

Requirement 1: Room Booking System

We found during interviews that employees are using what they call the "Google System" for room bookings. The process is outlined in Figure 20. First, a room requestor from outside of the SPCA either requests a room for hire through Hallmaster, a website with whom the SPCA is registered, or they call to request it. Next, an employee checks this request against conflicts on a shared Google calendar. Then, the employee confirms with the requestor, and the staff ask if the requestor would like to additionally hire a projector, refreshments, or consumables. Requesters can also fill out this information on a Google form. An employee then takes that information and adds it all to the Google calendar. They also submit an invoice to the requestor to be paid. At the end of this process, the booking has been duplicated in Hallmaster, Google Calendar, Google Forms, and a paper form, so it is housed in four separate locations.

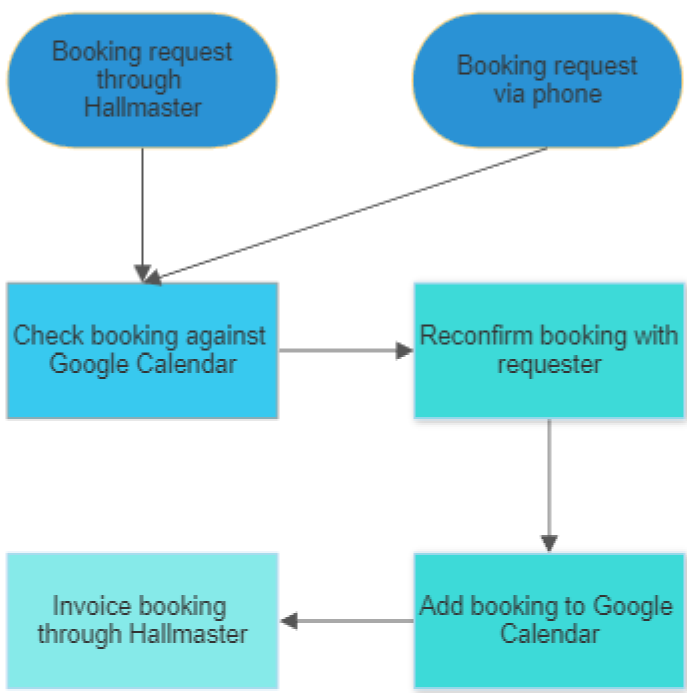

Figure 20 - Process of making a room booking.

Interviewees expressed considerable dissatisfaction with this process. We found that the community centers we interviewed all hired out rooms, so we asked if they had a booking system which works well (see Section 4.2). All centers used a system similar in function and performance to the SPCA's. A challenge in developing an improved booking system for the SPCA is their use of sliding-scale payments for room hire, which depends on the payment capacity of the organization requesting it. For example, the SPCA lowers rates for other nonprofit groups. From our research and discussions with other local nonprofits (see Section 4.2), there does not exist a booking software that is able to enact this kind of sliding scale payment, meaning that we are unable to identify a better system for the SPCA than the "Google System."

Requirement 2-4: Tracking Beneficiary Data, Membership Forms, Restrictions and Permissions

As discussed previously, much of the data recorded by the SPCA is beneficiary data, meaning that it has a one-to-one relationship with an individual. A large portion of this data, such as name, postal code, or contact information, is collected during member registration through a paper registration form. In some cases, such as in Golden Years, this form is then manually transcribed into a digital spreadsheet. During interviews, we asked employees if they would appreciate having this data automatically populated into a database through an online registration form. They replied that this option would be better than the current system. One concern reported in response to this question was that a large proportion of SPCA visitors and members are elderly, so an online registration form may be difficult for them to fill out due to their lack of experience with technology, or difficulty reading/typing.

Another concern reported was that, if this data was online, then it may not be protected or kept as sensitively as it would be in paper form in a filing cabinet. Because the data collected is attached to an individual, much of the data collected is sensitive or requires certain protections. Therefore, we identified that one of the requirements of a data management system would be the ability to restrict and grant access to beneficiary data. The nursery manager specifically stated that this would be important for the nursery, as children's data requires more specific data protection regulations.

Requirement 4-5: Tagging Users, Sorting by Tags

The ability to tag users was identified in several interviews as a way to further program evaluation and to ensure that services are reaching the desired audience. According to interviewees, tagging users means that the system allows beneficiaries to be associated with specific tags, and the system can sort and perform different functions for those users based on tags, such as sending out emails or filtering when generating reports. Examples of user tags given to us by employees were "has children under five" or classes the user was interested in or regularly attended. The ability to tag users was later identified by other nonprofits as a necessary feature in the systems that they use to manage beneficiary data, which strengthens the SPCA staff members identification of it as an important feature in the recommended data management system. A reason we found in support of systems which provide a tagging feature was that tags make using data much simpler, as supported by responses from both SPCA and other nonprofit employees. For example, when generating reports for funding, tags allow the user to find all attendees of a certain program and to generate an attendance graph over a certain amount of time based on these tags. Instead of seeking attendance information manually, the ability to filter and sort by tags allows the users to automatically generate a report. Therefore, it was identified as a necessary feature in whatever data management system was chosen. Additionally, one employee mentioned that it would be helpful if they were able to send emails based on tags, so we took note of that as we were seeking a data management system, but we were unable to find one that fulfilled this need directly.

Requirement 6-7: Event Tracking, Supporting Integrations

In order to provide more detailed reports to funders about event attendance, interviewees requested that the system is able to track events, ideally in a calendar format, and check members into events. Currently, much event tracking data is held on paper forms which is difficult to use and decentralized. Therefore, interviewees request a centralized digital system which will make data easier to turn into funding reports. The SPCA currently uses EventBrite to track event registrations and sell event tickets, so a CRM which supports EventBrite integrations or has an in-house software which supports event registrations and ticket sales was identified as a requirement. Ideally, this system would cost less than EventBrite, which takes 10% of the profit generated from ticket sales. The SPCA also uses MailChimp, a digital mailing service, for their weekly newsletter, and requests a system which can integrate with MailChimp.

Requirement 8: Technical Support

We identified a major potential challenge to the SPCA in implementing a data management system to be a lack of technological expertise on the part of interviewed employees. For example, some employees reported having difficulty navigating Google Suites and required the help of another staff member to fully utilize the technology. We identified one employee with greater technological proficiency, making them crucial for the longevity of any CRM that is implemented. This challenge is reflected in the IQP project conducted at the SYDRC in Spring 2020 and 2022, which was discussed in our background section (see Section 2.8.3), so we were not surprised to identify this challenge at the SPCA. Community centers interviewed recommended identifying one employee as a technological lead to run the data management system and assist other employees who are not technologically inclined. Since creating and funding an additional role at the SPCA may not be possible, we greatly emphasized responsive and helpful technical support in our checklist of criteria.

4.1.4 Potential Challenge for Data Management Implementation

Another challenge we identified was the SPCA's lack of funds for a paid CRM system. The director of the SPCA recommended that we find some potential short-term solutions as well as recommend a long-term solution that the SPCA could use once they have secured funding. This influenced our decision to recommend a free CRM that could be used currently and a for-cost CRM that could be used in the future. It also influenced our decision to find some simple fixes to technical problems that the SPCA was experiencing, such as the timekeeping system or potential fixes to Google Suites file management.

4.2 Data Management Practices of Community Organizations in Camden

4.2.1 Data Collected by Community Organizations in Camden

Based on interviews with three Camden-based community organizations and one Camden-based funding body (Camden Giving), we determined the kinds of data that nonprofits must collect in order to secure funding. A checklist of the data that nonprofits must collect in order to secure funding is presented in Figure 21. This checklist has been divided into two sections, ”Data on Beneficiaries” and “Data on Programs”.

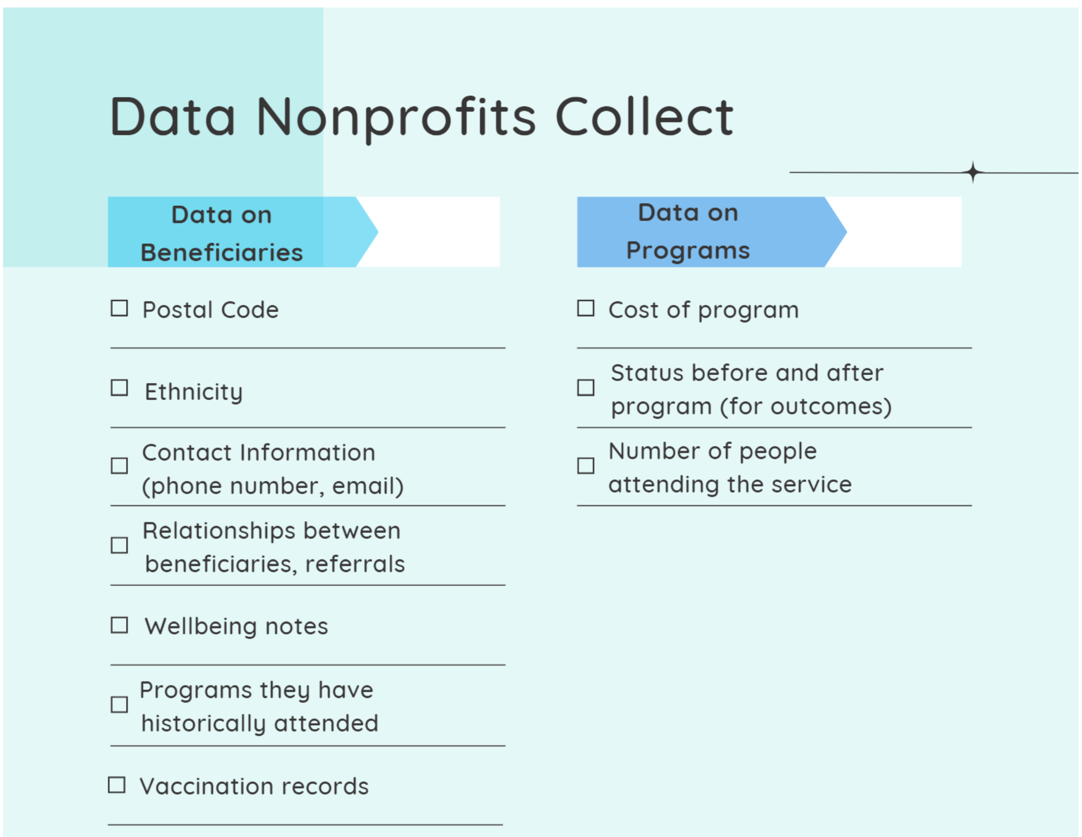

Figure 21 - Data nonprofits reported collecting on beneficiaries and programs.

In all interviews, collecting the postal code of beneficiaries was explicitly reported as necessary for funding purposes. The reason cited by Camden Giving was that retaining postal code data allows nonprofits to know who is benefitting from their services, which they can then report to funding bodies. Some funding bodies, such as the Camden Council which provides funds to many Camden-based nonprofits to be used to support Camden-based individuals, seek to target specific groups. Therefore, understanding who the nonprofit is actually servicing is a requirement.

Nonprofits reported comparing data, such as postal code data, against census data from the Camden Government. For example, if the census reports a particularly high level of deprivation in one postal code region, nonprofits can attempt to serve more individuals in that postal code. Understanding where their beneficiaries are coming from will help nonprofits in several ways. First, nonprofits measure whether they are reaching the most disenfranchised of their service area. Second, nonprofits can lobby for additional funding by demonstrating that they are meeting the needs of those in particularly high need. Therefore, we determined that data collected by the census serves as a prominent marker for Camden nonprofits interviewed.

Use of census data was confirmed by the funder Camden Giving, as they reported looking at data openly available, such as index of deprivation in the community, crime rates, and surveys of Londoners in order to determine where funding needs were greatest. Camden Giving compares this against "simple data," including the number of people attending a service at a nonprofit and who those people are (based on the data given by the nonprofit, such as postal code or ethnicity). Demographic data plays a large part in funding decisions for Camden Giving. A limitation in interviewing Camden Giving is that they use a democratic style of funding that includes pulling in community members impacted by funding decisions and, therefore, less strictly requiring specific data. During our research, we were unable to interview any other funding bodies in Camden in order to confirm or deny Camden Giving's reports on funding decisions.

4.2.2 Data Management Systems Used by Community Organizations in Camden

The three community centers interviewed used three different CRMs—Salesforce, Substance Views, and Time to Spare. The community center using Salesforce stated that they would not necessarily recommend Salesforce, as it has a high implementation cost. Though the license for Salesforce for nonprofits is free, Salesforce is highly customizable and technically advanced, making it necessary for nonprofits to hire third-party consultants to implement the system. Overall, the Salesforce user was dissatisfied because the system was expensive, implementation took a long time, and features initially promised by their third-party installation consultant were excluded. The center using Substance Views found the software does not meet all its needs, so they are seeking software to supplement its capabilities. The Time to Spare user reported satisfaction with the product, particularly with the founders and technical support available, and they recommended the product to the SPCA. Additionally, the funding body Camden Giving stated that they would be recommending the use of Time to Spare to grantees and requiring it for some future grants. As a result, we researched Time to Spare in more depth (as seen in Section 4.3).

4.3 Results of Research on and Interviews with CRM Representatives

From our initial research, we developed a list of criteria relevant to the SPCA's system requirements to evaluate CRMs on. These criteria included:

- Cost
- Relevant features
- Ease of Use
- Technical Support Provided
- Implementation Time
- Customizability

Although these criteria remained relevant throughout our research, we identified more specific feature criteria based on interviews with SPCA staff and local nonprofits, which we used to create Figure 19 (the checklist of criteria) in Section 4.1.3. We assessed CRMs based on this criteria. We found that many CRMs available for nonprofit organizations were heavily focused on tracking donor information rather than beneficiary data, so we ruled out donor-focused CRMs. Instead, we focused on CRMs that tracked beneficiary information, such as names, contact information, postal codes, and event attendance. We held Zoom informational calls with representatives of Insightly and Beacon CRMs, and we met in person with a representative of Time to Spare. These meetings served as a useful way to learn more about the features each system had, as well as the support provided by system staff. Based on research and interviews, we created a shortlist of six CRMs that might meet the SPCA's needs, which can be seen in Figure Z below.

Figure Z - Final contenders for data management systems for the SPCA.

To visualize the findings of our research on these six CRMs, we created two tables. Table 2 compares the first three systems listed (Google Suites, Hubspot, and Time to Spare) as free systems. Table 3 compares the second three systems listed (Insightly, Donorfy, and Beacon) as paid systems. The tables assess the systems based on technical support, price, criteria met, and client-to-employee ratio. Technical support is rated either poor, average, or good based on customer reviews, resources made available by the company (ex. video demonstrations), and our interactions with customer support teams. The client-to-employee ratio is intended to serve as another marker of the availability of technical support. We focused on technical support in our comparisons because we identified it as a potential challenge in Section 3.1.

As seen in Table 2, Time to Spare performed best in all categories except client-to-employee ratio. As a small Camden-based CRM, Time to Spare has only three employees and a client base of over 500. Despite this, we determined Time to Spare is still likely to be the best fit for the SPCA since it has “Good” technical support (as determined by reported response time and a personal interview with the staff of Time to Spare) and fulfills 7/8 checklist requirements.

	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

Table 2 - Comparison of Free CRM Systems.

Google Suites has poor customer support, as established in thousands of UK reviews on Trustpilot.com, a website for leaving comments on experiences with different companies (Google Is Rated "Average" with 3.5 / 5 on Trustpilot, 2023). Hubspot has good technical support, with 4.5/5 stars on G2 – Business Software Reviews. David S., a CEO of a small business, advocated for Hubspot support when writing about how it is "top-notch and responds almost immediately" (David S., 2022). Time to Spare also has good technical support, with the team responding to 71% of support requests within 5 minutes and 97% of the conversations being rated positively (Neill & Thompson, 2023).

Each of the three CRM options in Table 2 has a free plan available for non-profits. Therefore, the price does not impact the decision in this case. Following the table from the top down, the next criteria is checklist features, which are the number of features included in the free plans from the list in Table 2. Time to Spare includes all 8 features on the checklist, followed by Hubspot meeting 6 and Google Suites meeting only 4.

Finally, the employee-to-client ratio is an indicator of the level of available technical support. As seen in Table 2, Hubspot is the leader in this row with a ratio of only 20 clients to one employee. However, this is not the only aspect to be considered. Time to Spare is a young company with only three employees, making its ratio much larger than Hubspot's. Time to Spare values its customer service, as explained above, rivaling larger companies with more employees.

	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

*- US Time Zone
**- Number calculated with the assumption of 7 users
*** - Certain features can be added for an additional cost

Table 3 - Comparison of Paid CRM Systems. A comparison of paid CRM systems can be seen in Table 3. For more expensive CRM systems, the technical support is better on average as compared to the free options. Donorfy and Beacon are easy to learn with their clear menus and simple layouts (Watts, 2021). They also provide easily accessible online help resources to supplement their live support (Watts, 2021). Insightly has slightly poorer technical support, with mixed responses on G2 – Business Software Reviews. Comments like "the tech support is great" (Justin B., 2023) and "it lacks proper technical support" (Shivam B., 2022) illustrate the variety of experiences that users have with Insightly, both positive and negative. In addition, the live support is based in a US Time Zone, which would make it difficult for the SPCA to coordinate with Insightly when they need assistance.

Next, pricing plays a large factor in these paid CRMs. Insightly starts at £29/user/month, meaning it will vary based on the number of users that the SPCA decides to have. In Table 3, we present an estimated cost of £203/month for Insightly, based on the assumption that the SPCA will need 7 users. This CRM is thus much more expensive than the other options in the table, Donorfy and Beacon. Each of the three CRMs also offers all 8 features from the checklist, with Beacon having an additional cost for a few. Though Beacon has paid add-ons, the base price is a quarter of the price of Donorfy and a seventh of the price of Insightly, while also allowing for unlimited users.

Finally, the client-to-employee ratio varies greatly from Donorfy and Beacon to Insightly. This ratio is reflected in the rating of technical support, seeing as it improves as the client-to-employee ratio lowers.

After researching the above systems with these factors in mind as well, we found that HubSpot and Insightly were not based in the UK or specifically built for charities. Donorfy was built for nonprofits, but focused mainly on the fundraising aspect. We were looking for a system that was both created with nonprofits in mind and had a heavy emphasis on beneficiary information. We decided to research Beacon and Time to Spare more extensively, as they both seem to be strong options that fit the required criteria, factors, and were reasonably priced.

We initially had a few questions and concerns about Time to Spare that had to be found through research and our interview with them. SPCA staff members who have used Time to Spare in the past discussed how there was no ability to sort users by tags, and we found out through our interview that this had since been updated. Our team also was unsure about the data security and if Camden Council would have access to any of the information as they were encouraging nonprofits to use this system. We found that an organization using Time to Spare can set permissions, allowing the Council to see only certain data.We also learned through our interviews with funding bodies that grants will be created for Time to Spare users only. Our team also tested out Time to Spare by using the application. This gave us better insights into the ease of use for this system, and more information about the general user interface of Time to Spare.

To delve deeper into Beacon, we first looked into the reviews and compared it to other systems. Beacon was highly reviewed, with a rating of 4.9 out of 5 stars overall, 4.8 stars for ease of use, 5.0 for customer service, 4.7 for features, and 5.0 for value for money (Capterra, 2023). Having more knowledge on the size of nonprofits using Beacon was also important. Figure 22 below portrays the percentages of organizations using Beacon that have 10 or less employees, and 50 or less employees.

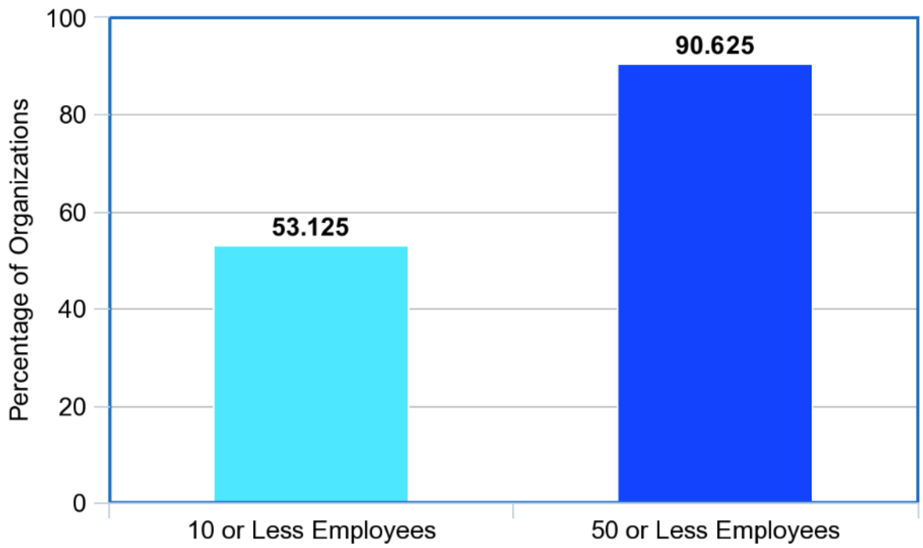

Figure 22 - Percentages of Organizations Using Beacon at Different Sizes.

The statistics in Figure 22 was useful information, as it portrayed that most organizations that used and liked Beacon were of similar size to the SPCA. We also tested out Beacon by using a free trial of the application, which allowed us to better see the user interface and overall flow of Beacon. Our free trial also allowed us to test out how easy it is to import and export data, create users, and more.

4.4 Results of Research into Simple Solutions for SPCA's Identified Problems

Based on answers to our interview questions, we researched tools outside of CRMs. These included Google Suites, as well as small scale tools such a time-keeping system.

4.4.1 Timekeeping System

Once the SPCA expressed interest in a timekeeping system for employees, we asked exploratory questions to define system requirements. Employees expressed that this system would need to take the times of check-ins and check-outs automatically, keep track of who is in the building at any given time, and calculate how long each employee worked in a given time. Additionally, we found that the SPCA staff currently only uses the general sign-in sheet for tracking employee hours, which, according to interviews, with the financial director, is suboptimal. It requires the financial director to calculate time worked on their own and to digitize the answers, which could be automated.

Following this information, we constructed a prototype system and tested it with the members of our team. After modifying the system based on feedback, we created a user guide. From there, we tested the updated system for two weeks with three key employees to receive feedback. The test employees had some suggestions to make the formatting of the spreadsheet's output more readable, which we implemented. Other than the formatting issues, the participants were happy, stating that there were no problems with the system. One issue arose, where two of 42 sign-in/outs were missed, which could be problematic. In response, we outlined processes to update or add sign-in/outs to the user guide.

4.4.2 Google Suites

We learned, through interviewing the SPCA, that they make use of Google Suites as their main organizational digital filing system. We researched Google Suites best practices for data management and additional features of Google Suites that may be used by the SPCA. The intention of this was to provide some short-term solutions which could be used by the SPCA. There were many limitations to this research, as little information was available online about how digital file systems are best organized. This led to some potentially less legitimate sources being used for reference in research, including the subreddit "Nonprofits" on the popular internet forum "Reddit." Additionally, the SPCA's technical support team, who set up the Google Suites organization, were unresponsive and unable to answer some questions, so we were unable to fully understand how the Google Suites organization was initially set up. Regardless, we were able to conduct more general research, often assuming that the SPCA's Google Suites organization was set up on Google Suites for nonprofits, which is the free version of Google Suites provided to nonprofits (Google Support, 2023).

Reddit user u/MrMoneyWhales posted a method of filing systems that can be better organized for nonprofit and general organizational purposes in the "Nonprofits" subreddit (2021). They suggest first starting with department names in the main folder. These department names should never change, and there should be little to no additions to the main folder. If individuals in the organization wish to access specific folders or files more easily, as in, without clicking through the main department folders, then they can create separate links to these documents by selecting the share option on the top right of the Google document and then generating a link. Documents within the department folders can be labeled according to a specific system, such as “foldername_year-month-date.” If there are less than ten files specifically related to each other, then they can instead be named “foldername_subtype_year-month-date.” Examples of files that may be related to each other are registration forms or event attendance sheets. If there are more than ten files specifically related to each other, then a separate folder within the department folder should be created to house them. In order for this file naming schema to work well, all members of the organization should be sorted by alphabetical order as their filter option in Google Drive. In general, these practices make a file tree more manageable and usable, allowing everyone to access the files they need to, while allowing people to be able to predict where other files will be found. u/MrMoneyWhales also suggested a free Coursera course titled “Google Professional Workspace Administrator Professional Certificate,” which provides free training on managing Google Workspaces (“Google Professional Workspace Administrator Professional Certificate”, 2023).

u/MrMoneyWhales also suggests designating an individual to maintain the Google Drive and, if there are multiple large departments, several individuals in charge of those departments (2021). This is similar to what was discussed in our background section, “2.6 Challenges Faced by Nonprofits When Collecting Data.” Here, we summarize findings from Innovation Network (2016) which describe only 8% of organizations as having staff dedicated to data collection and evaluation. In the same section, we summarize findings from Mayer & Fischer (2023), which state that a problem which arises from not having staff dedicated to data evaluation and collection is that it will not happen, as employees have many other primary job responsibilities as nonprofits. In much the same way, u/MrMoneyWhales suggests that Google Suite data management will not occur unless it is the responsibility of a single employee. In both cases, ownership must be taken in order to ensure that the job is fulfilled.

Another potential system we researched for the SPCA was Google Suite for Nonprofits, a tool launched in 2011 to empower nonprofits (Google Support, 2023). We contacted the SPCA’s technical support to ask them if the SPCA is currently enrolled in Google Suites for Nonprofits, but we did not get responses. One of its biggest benefits of Google Suites for Nonprofits is potential access to $10,000 in Google Ads budget as part of its Google Ads for Nonprofits program (Google Support, 2023; Google for Nonprofits, 2019). Through this program, nonprofits access $10,000 to submit bids for certain search phrases on Google, so they are able to promote links to, for example, their website when these phrases are searched (Google Support, 2023; Google for Nonprofits, 2019). For example, nonprofits could bid for “room for hire in Camden” to promote a link to their room hiring service. To join Google Ads Grants, organizations must join Google Suites for Nonprofits, hold valid charity status, be approved through the eligibility form, and have a high quality website that meets Ad Grants Website Policy (Google Support, 2023; Google for Nonprofits, 2019).

5. Conclusions and Recommendations

The findings outlined in the previous section lead us to a roadmap approach of recommendations for the SPCA. There are a number of areas for growth within the SPCA, both immediately and in the future. The SPCA's current lack of funding shaped our recommendations, resulting in the multi-step approach seen in Figure 24. With financial limitations in mind, we created this roadmap to meet the data management needs of the SPCA immediately. This is also supplemented with two deliverables to assist the SPCA with a potential switch to a paid CRM in the future. In the short term, there are other non-CRM immediate improvements that can be implemented quickly and provide tangible results. Additionally, our proposed roadmap outlines steps the SPCA can take to improve their data management over time, allowing them to stop along the path whenever they determine their needs have been met.

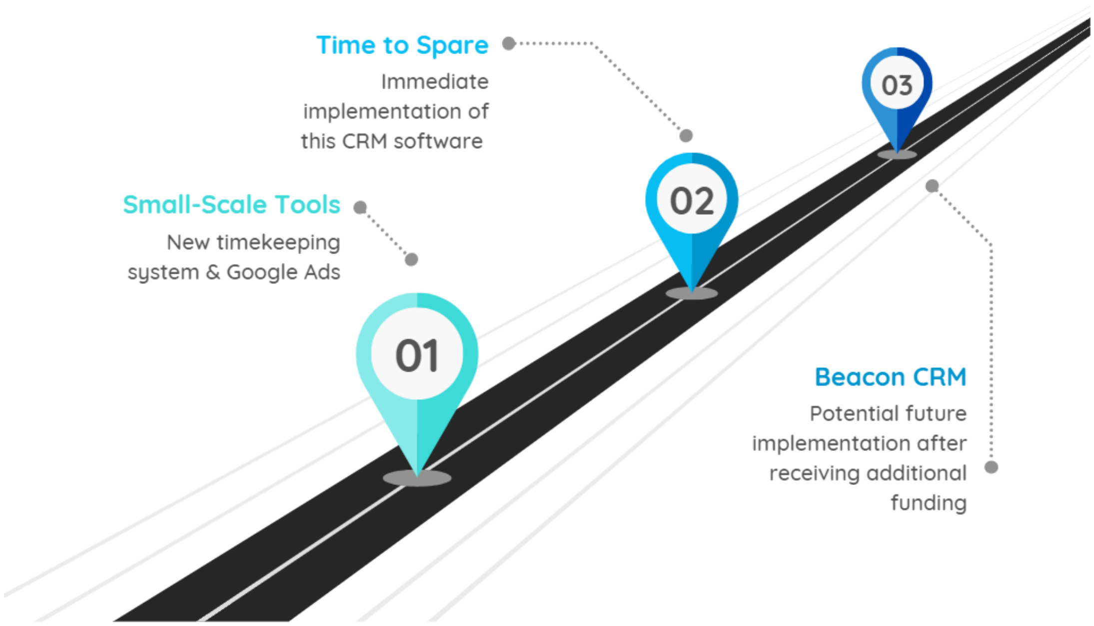

Figure 24 - Graphical representation of roadmap recommendation.

5.1 General Improvements

Following positive responses from the timekeeping system trial, we conclude that the current system will meet the needs of the SPCA. Therefore, we recommend the SPCA expands the usage of the system to all employees and volunteers, use a centralized tablet for easy sign-in and out, and edit the system to fix any challenges that arise. Additionally, we recommend that the SPCA designate one member of staff to be in charge of the system, and be responsible for upkeep. We recommend their receptionist be designated for this role. During staff acclimation to the new system, the SPCA should continue to use the existing paper system concurrently with the new digital system. To support this transition, we created a document, in Appendix F, that explains how the system works, and gives insights to how to set it up themselves, in case the verbal guidance we have given is not sufficient. If the SPCA eventually wishes to expand this tracking capability to visitors, we recommend using the built-in capabilities from Time to Spare or Beacon, rather than the timekeeping system.

Additionally, it is clear that embracing Google Suites organization can be beneficial for the SPCA. Better data organization will allow the SPCA to spend less time searching through their file system, and more time doing valuable work. For this reason, we have constructed an instructional printout that can be displayed in the reception area of the SPCA for employees to easily reference when necessary.

Finally, taking advantage of the Google Suite for Nonprofits ad grant would benefit the SPCA. The value of advertising is substantial, and could bring in more patrons. To do this, we recommend several things. First, the SPCA should ensure they are utilizing Google Suites for Nonprofits. We attempted to contact technical support to ensure that their website satisfies the requirements laid out by Google, but were unable to get an answer. We recommend that the SPCA begin by finding out if they are already registered with Google Suite for Nonprofits. If they are, our next suggestion is to take advantage of its additional features, such as Google Ads, by applying for their Google Suites for Nonprofits grant. If successful, this will increase visitation and room booking as a result of increased advertising with Google's algorithms.

5.2 System for Data Management – Immediate Implementation

After conducting our needs assessment, we found that the SPCA needs an immediate change in its current system of data management. The lack of organization and time-consuming processes are hindering the workflow of the Association, as we learned through our on-site observations and interviews. For immediate implementation, we recommend the free CRM, Time to Spare. This software meets all of the criteria in the checklist created from our findings

(Figure 19), is free, and it has positive customer feedback, making it a good choice for the SPCA.

Time to Spare offers features that will be useful for the SPCA, including booking forms, membership forms, and attendance tracking. These are three of the main forms of data collection that the SPCA uses currently and can be made automated and more organized through Time to Spare. This will save the employees time not removing the need to digitize much of the information, but also being able to find it more easily online rather than sifting through paper copies. Time to Spare also allows for tagging members and sorting by these tags, which is an efficient way of finding a target audience. Marketing to these specific demographics can increase turnout and attendance of the SPCA's programs.

Another draw of this software is the technical support. As discussed in the findings, Time to Spare has responsive technical support with positive reviews. This will be especially important because, as mentioned previously, the majority of staff at the SPCA is not technologically inclined. To create a lasting and useful CRM system at the Association, a positive support system will be necessary.

Lastly, the SPCA is relatively small, with only 13 paid employees at the time of our research. Although they are continuing to grow, their funds are limited, meaning the solution needs to be recommended with cost in mind. Time to Spare is a free software that comes with features, integration capabilities, and responsive technical support. This makes immediate implementation feasible, as there is no need to wait for additional grant applications to fund the system.

Considering all of the checklist items for a short-term CRM, Time to Spare is the most practical option for the SPCA. With the right price, support, and features, this system is both feasible and promising for immediate implementation. Our team is confident in recommending this software for the Association for its data management in the near future.

5.3 System for Data Management – Advanced CRM

Our team determined that it would be beneficial to provide the SPCA with another option for data management that is more advanced and has features. Providing this option gives the SPCA a way to upgrade their data management if they so choose, and it also provides another potential system if Time to Spare does not end up working well. This potential longer-term option would be paid for, and we had to decide between Insightly, Donorfy, and Beacon. We decided not to choose Insightly because, although it had the criteria we wanted, it was not UK-based or built specifically for charities, and it was a more expensive option than the rest. Insightly also had a very high client-to-employee ratio compared to Beacon, implying worse technical support. We chose not to recommend Donorfy because it was too fundraising-based, which was not what we were looking for in a solution. So, we decided that Beacon would be the best; it meets all criteria, is UK-based and built for charities, has high technical support, and is not just fundraising-based. The high reviews and ease of use during our testing also played an important role in our decision to recommend Beacon as a more advanced potentially long term solution.

Beacon has all the features that the SPCA wanted in a system laid out in a visually appealing way. It is a highly customizable system, and staff are able to create multiple dashboards specific to their program. Beacon can create advanced reports on many different metrics, assisting organizations in showing outcomes and impacts. Beacon is also extremely useful for tracking beneficiary and grant information, allowing important data to be tracked and kept in a centralized location. Beacon also allows users to be sorted by type, making it easier to find clients that staff are looking for and saving time. This CRM also has a strong task management system, allowing staff members to better track which activities or work must be done for the day, week, or month.

We also decided to create a document that explains some of the key differences between Beacon and Time to Spare. There is a large price gap between the two systems, so we decided that it would be useful to create a document that compares the two and that showcases some of Beacon's advancements over Time to Spare, shown in Appendix H. This document provides reasoning to the SPCA about why upgrading to Beacon at some point may—or may not—be worth the extra funds and effort. This document could also help the SPCA get a grant for this CRM system insofar as they could show it to the Board of Trustees as a succinct summary of the benefits of Beacon for the SPCA.

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Appendix A: Additional SPCA Background

SPCA is located in and serves the St Pancras and Somers Town Ward within Camden, consisting of 18,109 residents as of 2018. Camden itself is one of the more affluent boroughs of London, ranking in the top third in average income with £52,962 annually per family (Camden.gov.uk, 2016), TThe community that the SPCA serves is more socio-economically diverse than other areas of Camden. Comparatively, the neighborhoods that the SPCA caters specifically to have lower average annual incomes. These neighborhoods include St. Pancras, Camden Central, Euston, King's Cross, and Somers Town. Excluding St. Pancras, these neighborhoods average £35,441[1] per family annually (Camden.gov.uk, 2016). This is a difference of £17,521 euro from the overall Camden average, demonstrating that there are relative inequities in the borough.

In mid-2019, the St Pancras and Somers Town Ward was ranked the largest ward by population size with a total of 18,000 residents (London Borough of Camden, 2020). Low household income is a proxy for poverty, where the average is below 60% of the median household income in an area (London Borough of Camden, 2020). Figure 25 shows that St. Pancras and Somers Town ward has the highest percentage of households (35%) living below £20k (London Borough of Camden, 2020). The Camden borough of London has a disproportionate amount of community-members living below the poverty line, as demonstrated in Figure 26.

[1] This is based on figures from 2015 stating that Camden Central, Euston, Kings Cross, and Somers Town have an annual average income per family of £42,820, £32,967, £34,505, and £31,472 respectively (Camden.gov.uk, 2016).

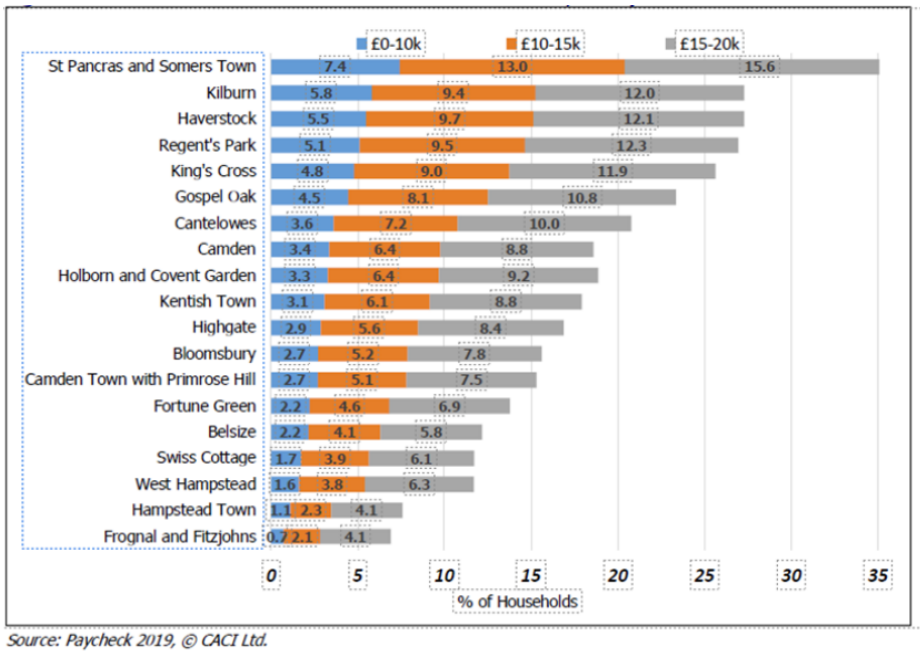

Figure 25 - Percentage of households living below £20k in Camden Wards.

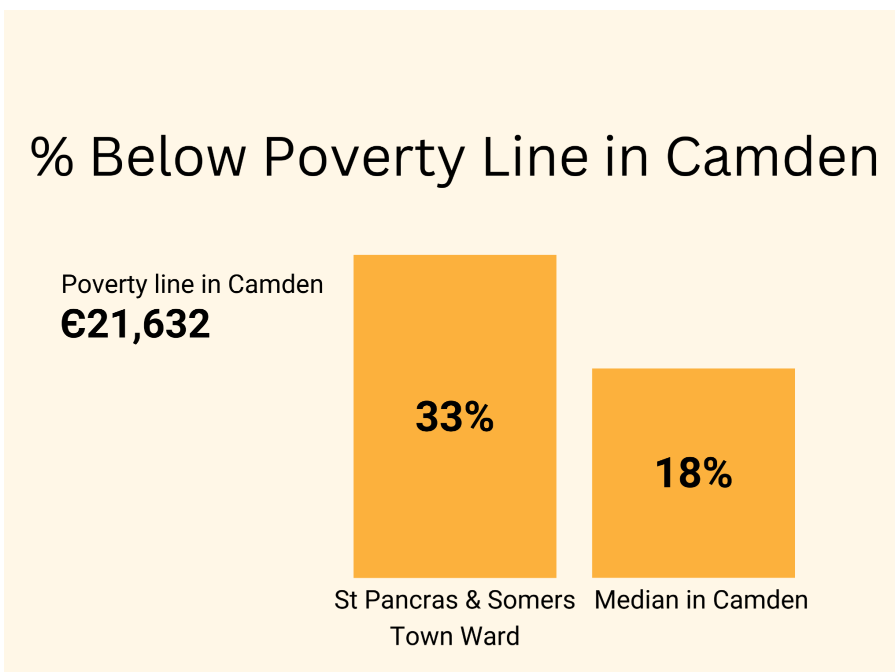

Figure 26 - Poverty Comparison between St Pancras and surrounding borough.

Additionally, all of these neighborhoods have a greater proportion of minority groups in their population, in all cases driven by a larger proportion of Bangladeshi residents. Camden averages a 5.7% population of Bangladeshi people (Camden.gov.uk, 2016).Certain neighborhoods in Camden, specifically those the SPCA caters to, deviate from this number. For example, Bangladeshi residents compose 8.6% of the population in Camden Central, 12.9% in Kings Cross, 13.5% in Euston, and 18.9% in Somers Town (Camden.gov.uk, 2016).

The population comprises the working age (16-64), and dependent groups (0-15 and 65+) (London Borough of Camden, 2020). A method used to define the demographics in need of support is called the dependency ratio, which is found by comparing the number of people in the dependent groups age range to those in the working age range. The dependency ratio of the area is 34.4, which is lower than the average ratio of Camden of 38.0 (London Borough of Camden, 2020). SPCA has various programs that cater to the surrounding dependent population, which is why the dependency ratio is relevant to their guests.

The work done by SPCA is important to the St Pancras and Somers Town Ward, with this area being ranked the most deprived ward in Camden (London Borough of Camden, 2020). The data demonstrating the deprivation of the St Pancras and Somers Town Ward is in Figure 27. This deprivation data is calculated using seven factors which include “income, employment, health and disability, education, skills and training, housing and services, and crime and living environment” (London Borough of Camden, 2020). Looking at the collected data, it is seen that “ 7 of the 8 St Pancras and Somers Town [subsections] fall within the 20% most deprived in England on IDACI (affecting children). All 8 [subsections] fall within the 15.5% most deprived in England on IDAOPI (affecting older people)” (London Borough of Camden, 2020).

Ward and LSOA		Index of Multiple Deprivation			Indices of Deprivation Sub-domains			
			RANK OF IMD of all LSOAs in England (/32,844)		Income Deprivation Affecting Children Index (IDACI)		Income Deprivation Affecting Older People Index (IDAOPI)	
Ward name	LSOA code	Rank in Camden (/133)	1 is most deprived	% Most Deprived of LSOAs in England	Rank in England (/32,844)	% Most Deprived of LSOAs in England	Rank in England (/32,844)	% Most Deprived of LSOAs in England
St Pancras and Somers Town	E01000952	22	6,511	*19.8*	4,636	*14.1*	1,504	*4.6*
	E01000953	10	5,146	*15.7*	2,524	*7.7*	856	*2.6*
	E01000954	14	5,931	*18.1*	4,554	*13.9*	4,623	*14.1*
	E01000955	23	6,579	*20.0*	7,424	*22.6*	5,054	*15.4*
	E01000956	20	6,420	*19.5*	3,332	*10.1*	2,335	*7.1*
	E01000957	38	9,984	*30.4*	3,913	*11.9*	5,058	*15.4*
	E01000958	45	11,047	*33.6*	1,852	*5.6*	612	*1.9*
	E01000959	5	4,567	*13.9*	3,493	*10.6*	2,432	*7.4*

Source: English Indices of Deprivation 2019, © MHCLG, 2019.

Figure 27 - Income deprivation data in St. Pancras and Somers Town.

As mentioned above, these groups are a part of the dependent population. It is especially important to offer additional support in wards where they are at an even more severe disadvantage such as St Pancras and Somers Town, which is consistently ranked lower than other wards.

SPCA primarily focuses on serving underserved and potentially vulnerable communities, and their regular programming demonstrates this (SPCA.org, 2023). In this case, underserved and vulnerable communities include youth, the elderly, and people with disabilities in the Camden area (SPCA.org, 2023). Their mission is to "deliver sustainable and high-quality community services for Camden's residents, especially those living in St Pancras and Somers Town and those in the greatest need" (SPCA.org, 2023). Their programming, excluding their Golden Years programming, is also open to the general public (SPCA.org, 2023). The organization does this while being relatively small with only nine paid staff, twenty-one volunteers, and a board of seven trustees. Examples of regular weekly events include:

(1) **The Community Kitchen** runs on Tuesdays and Thursdays (SPCA.org, 2023). The purpose of the program is to provide a space for the community to gather for general life activities, such as helping one's child with homework or meeting community members (SPCA.org, 2023). While there, community members can also get a warm meal which is currently being funded by a financial award of £22,934.49 from the Camden Council (SPCA.org, 2023).

(2) **Stay & Play** runs on Mondays and serves as an opportunity for preschool children to enjoy activities with peers, parents, and Saint Pancras Community Association carers (SPCA.org, 2023).

(3) **The Nursery** is open Tuesday, Wednesday, and Thursday between 930AM and 230PM for children aged two (SPCA.org, 2023). Patrons pay to participate in this program, but some members of the community may qualify for government aid that funds fifteen hours of childcare for children aged two (Berg, 2023). The nursery is currently full (SPCA.org, 2023).

(4) **Yoga for Golden Years** is a program that runs weekly for those above the age of 60 (SPCA.org, 2023). Members of the community can participate in this program and other one-off activities for £10 per year (SPCA.org, 2023).

Appendix B: Preamble for Interviews

Prior to starting any of the interviews, we gave a preamble to stay within GDPR Regulations:

We are a Worcester Polytechnic Institute student-led research team conducting this interview on behalf of the Saint Pancras Community Associated in order to understand their data management needs and recommend a data management software. This interview is voluntary and should take about 30 minutes. If you feel uncomfortable about any question, you can choose not to answer it. All information will be stored securely on our laptops and disposed of a month after the completion of the project. This data may be used in our final report and other outputs, such as presentations. The data will be kept as anonymous as possible, and we will not be asking you for personal information. If you have questions or concerns about the survey or project as a whole, you are able to contact us or our advisors. If there is anything which you are uncomfortable sharing with us, we will provide an anonymous comment option which will be emailed out within the week.

Appendix C: Questions for One-on-One Interviews

Questions:

1. **Preliminary information–** (for our records)
    1.1. How long have you been with the SPCA?
    1.2. Have you held other roles or positions aside from your current one?
    1.3. What responsibilities come with your role?
2. **Kind of data collected–** What kind of data do you collect?
    2.1. Names?
    2.2. Age?
    2.3. Ethnicity?
    2.4. Address?
    2.5. Contact information (Email / Phone / etc.)?
    2.6. Occupation?
3. **Process of data collection–** How do you collect information on programs and activities?
    3.1. (If they are confused by this question) Is it collected using paper surveys? Digital surveys? Anonymous boxes? Feedback cards? Word of mouth? Observation? Etc
        3.1.1. (If not yet clarified) Do participants fill out this information themselves or do you ask them…etc?
    3.2. **Tailor these questions to the interviewee's role–** walk more closely through this process depending on how much they describe.
    3.3. Do you face any challenges with language barriers when collecting information?
        3.3.1. (If yes) How do you overcome language barriers when collecting your information?
    3.4. What currently works in your data collection process?
    3.5. Are there any challenges you face in collecting data? If so, what are they?
        3.5.1. Are there any technical issues you face collecting data? (If they do not specifically get into technical challenges).
        3.5.2. (If they do not already explain) How do you workaround these challenges? (To see if they have any current solutions that we might be able to improve upon using better data management).

4. **Similar Employees Responsibilities–** Do you know of anybody else in the organization who collects the same data?
    4.1. (If someone else in the organization collects the same data) Who collects the same data?
5. **Storage and maintenance of data–** Where do you store the data that you collect?
    5.1. **Need to tailor these questions to the interviewee's role–** Ask about how they organize data stored.
    5.2. **Need to tailor these questions to the interviewee's role–** Ask about how they evaluate data. Examples– how they track program success or event success, tracking repeat clients, reporting membership numbers, active vs inactive members.
    5.3. Is any of this data sensitive?
        5.3.1. Is any of the data personal/non-disclosable information that requires extra controls?
6. **Use for data–** When you collect this data, is there a purpose that you have in mind for it?
    6.1. Is the data ultimately used after it is collected?
        6.1.1. Do you use the data that you collect or does somebody else?
    6.2. Does it help guide changes in the SPCA? For instance, how to improve the SPCA's functions?
    6.3. Does it help with getting funding?
        6.3.1. What are some sources of funding which you have used?
    6.4. Does it help reach out to patrons?
    6.5. Is it required as part of the program this is for?
    6.6. Is the data sent to anyone?
        6.6.1. How is it sent?

Appendix D: Interview Questions for Other Community Organizations

1. What is your name?
    1.1. What is your role at the organization?
    1.2. How long have you been working with this organization?
2. What programs does the [ORGANIZATION] offer?
    2.1. Do they cater to certain demographics?
    2.2. Are the programs each run by a different employee/volunteer?
3. What kind of data do you collect?
    3.1. Is the same type of data collected for each program or does it vary?
    3.2. Is it all collected using the same system?
    3.3. Is it all collected using the same procedure?
        3.3.1. What is your procedure for data collection? What do you do after data is collected?
4. What is your current system for collecting data?
    4.1. If it is a CRM, what type?
        4.1.1. When did you begin to use this CRM?
        4.1.2. How easy or difficult was it to set up the CRM?
            4.1.2.1. Did the CRM company provide support in setting up the CRM?
            4.1.2.2. How long did the setup take?
        4.1.3. Did you have any specific criteria in mind when choosing a CRM? If so, what were they?
            4.1.3.1. Does this CRM meet all that criteria?
        4.1.4. How often do you require technical support for this CRM?
            4.1.4.1. How responsive is the company in providing technical support?
    4.2. If it is not a CRM, what system do you use? (Microsoft Office, Google Suite, etc.)
5. How comfortable is your staff with this system?
    5.1. Were staff trained on how to use this system? If so, how?
    5.2. How long did it take for the staff to feel comfortable managing data on their own?

5.2.1.1. Do all staff and volunteers use the same procedure for collecting data?

5.2.1.2. (If they do) Are they all trained in this procedure?

5.3. Where do you store data that has been collected? Is any of it sensitive data?

6. Do you like this system for collecting data?

6.1. Why/why not?

6.2. What would you do to improve upon it, if anything? Are there any features you wish it had?

6.3. What would you keep? What does it allow you to do that you could not do before?

7. Why do you collect data?

7.1. How do you use the data that you have collected?

7.1.1. Is this data used to receive funding, such as grants?

7.1.1.1. If so, what form of data presentation has been useful when applying for grants?

7.1.2. Do you use it to help improve your services?

7.1.2.1. How does the information guide you to improve your services?

7.1.3. Is it used to reach new groups or people?

7.1.4. Does it help to keep in contact with prior clients?

8. What requirements do you find difficult to meet for funding bodies?

8.1. Are there any strategies used by your organization to help make these requirements possible to meet?

Appendix E: Interview Questions for Trustees/Funders/Local Council Officers

Two main things to touch on:

(1) Camden Giving's grant process, what kind of data they require, what kind of data compels participants, etc

(2) What data options they are exploring with grantees, do they supply grants for data management options?

Data/grant requirements

1. It says on Camden Giving's website to schedule a meeting with someone at the organization to talk about grant requirements–we were wondering if you could give us an idea of what that meeting would look like.
   - 1.1. –Follow along and ask appropriate questions about how he responds to above–
   - 1.2. What kind of data do you require of your grantees?
   - 1.3. Beyond required data, do grantees ever provide other kinds of data or information which make you more likely to pick them?
     - 1.3.1. What does the most influential data look like?

Data options exploring with grantees

1. What grantees are they exploring data options with? (If he can't say the grantees names, generally what kinds of organizations are they, are they similar to community centers at all).
   - 1.1. What are their data management needs? Size of organization? Type of data collected?
   - 1.2. What is their current system of managing data?
   - 1.3. What kinds of data management options are they exploring?
     - 1.3.1. Are they exploring any CRMs?
   - 1.4. Are they providing funding to those grantees?
     - 1.4.1. If they are, explore this a little more.

Appendix F: Timekeeping Deliverable

Timekeeping System Overview

Created by Joshua Barney, edited by Matthew McGourty, Vivian Vacharakupt, and Annie Zimmerman for use by the Saint Pancras Community Association

What is the system?

This system is set up to simply and efficiently collect clock-in and clock-out times for all employees and volunteers in the St Pancras Community Association. It then processes the data to display hours worked, as well as employees currently in the building.

How it Works

The system uses a Google Forms frontend (can be seen at the end) that asks users to submit their name, as well as if they are checking in or out. This is connected to a google sheet that processes the responses as they are submitted – calculating hours worked in a shift, and keeping a status of if that person has yet to clock back out.

Setting it Up

The guide below should sufficiently explain how the system works. To use the system, you will need to take a few steps. First, create your personal copy of the form and associated spreadsheet. Then, update the employee question on the form so the multiple choice options accurately reflect your employee roster. Finally, you will want to make tabs in the spreadsheet for each employee. A critical step is to update the name in the top left of each tab to ensure the system works correctly.

Links to example system and support documents

User Guide:
https://docs.google.com/document/d/1Yo7sUkqUmoO-6PDj3lx42fY9WMgJVjfNDBQ1STSO5ns/edit?usp=sharing

Example Spreadsheet:
https://docs.google.com/spreadsheets/d/17wN8_bFACfrijJ9kqPzTmbcb3wJ2YI-kxVvjSl7kEgg/edit#gid=779250267

Example Submission Form for Employees:
https://forms.gle/jrNxcYMqTJzTHB6t5

Example Editable Side of Google Form:
https://docs.google.com/forms/d/1dV-bzBl0UWhgQ7TxGgtGKa-58m_8Z0Lyww7cF8AdKL0/edit

Appendix G: Time to Spare Deliverable

Time to Spare Pilot Program for SPCA

Created by Annie Zimmerman, edited by Joshua Barney, Matthew McGourty, and Vivian Vacharakupt for use by the Saint Pancras Community Association

Purpose

The goal of our Time to Spare pilot program is to help volunteers and employees at the SPCA become acclimated to the user interface and functions of Time to Spare. This pilot uses the Time to Spare event attendance tracking feature. This feature allows volunteers to check members into events, which will allow the SPCA to see two things—(1) who is attending events at the SPCA and (2) what events individuals are attending at the SPCA. This way, the SPCA can begin tracking event outcomes and numbers in a standardized fashion while tracking the journey of individuals through the SPCA's program.

Resources for Running Pilot

Time to Spare has fantastic help blogs available here. We have identified a blog post that will be particularly useful to read before beginning this pilot program, titled Recording Attendances on Time to Spare findable here. This post should be read by volunteers prior to using the system.

What have we already done?

We have gone through all of the Golden Years data and ensured it was the most up to date information. In doing so, we added all members from the excel sheet given to us that were not yet in the Time to Spare database. We have also added Golden Years programs to the calendar.

How did we add members?

1. We selected "People" on the left hand bar.
2. Then, "Add New Members" at the top right.
3. Then, upload a spreadsheet. We uploaded the Golden Years spreadsheet given to us.
4. We went through all the people to ensure there were no duplicates. When there were, we combined the duplicates, carrying over the most up to date information (from the most recent Excel sheet).

- **Time to Spare has a built-in function for combining duplicates.** If you select a user which has a duplicate, Time to Spare will recognize that and ask if you would like to combine information. Details on how this works can be found here.

In the future, members can just be added using the Golden Years registration form.

1. Select "People" on the leftmost menubar.
2. Select the blue button titled "Add new members" on the top right.
3. Select the "Golden Years Registration" form seen in Figure 1.
4. Help the registering member fill out the form, then select "Add a new member" on the bottom of the form.

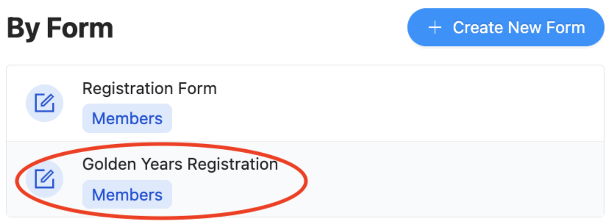

Figure 1 - Registration forms option with red circle on "Golden Years Registration."

The official Time to Spare help resource for adding members is titled Registration Forms and can be found here.

How did we add events?

The official Time to Spare help resource for adding events is titled Calendar and Events/Sessions/Activities and can be found here.

Appendix H: Beacon vs Time to Spare Deliverable

Why switch to Beacon from Time to Spare?

Created by Matt McGourty, edited by Joshua Barney, Vivian Vacharakupt, and Annie Zimmerman for use by the Saint Pancras Community Association

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Purpose

The purpose of this document is to weigh the pros and cons of switching to a paid CRM, Beacon, from a free CRM, Time to Spare. This document was created to be used by the Saint Pancras Community Association (SPCA) and viewed by SPCA employees in the case that they receive funding for a paid data management solution.

Our team chose Time to Spare as a free recommendation for the SPCAto meet its data management needs. We believe Time to Spare will be able to successfully fulfil these needs due to its features, price, technical support and focus on charities and community groups. The Camden Council's encouragement of use of Time to Spare and Time to Spare's increasing customer numbers serve as evidence of its organisational longevity.

Despite all of the positives of Time to Spare, it is not as powerful and does not have as many features as some paid CRMs. Our team chose Beacon as a potential paid CRM for the SPCA based on the criteria we identified for the organisation. As seen in Figure 1, Beacon offers three main plans, but we would suggest the plan at £104/month based on the requirements and size of the SPCA.

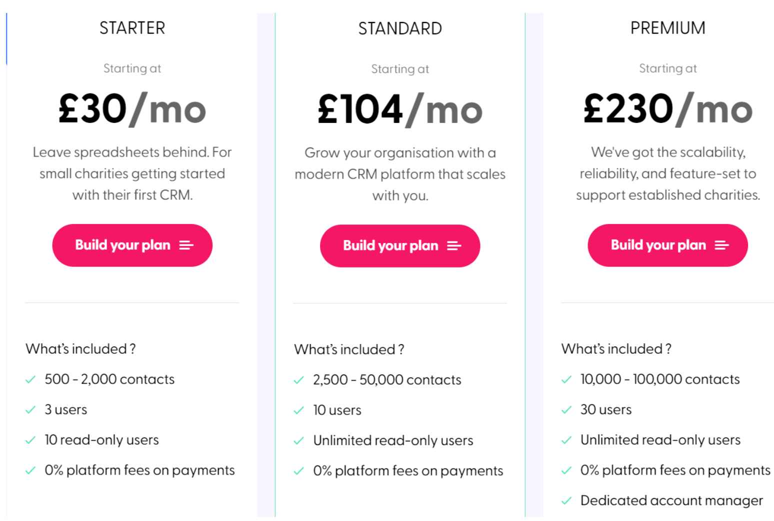


Figure 1 - Three main plans offered by Beacon CRM (Beaconcrm.org, 2023).

There are many reasons that the SPCA may choose to pay for the higher costing Beacon as opposed to continuing to use Time to Spare, which will be outlined in this document. This document can be used by SPCA staff and trustees to determine whether an upgrade is worthwhile for the SPCA.

Summary of Key Differences

1. Beacon has higher levels of **technical support**, providing items like video demonstrations and free courses that Time to Spare does not.
2. Beacon has a more **complex permissions system**, allowing for as many roles as an organisation requires with complete control over data roles can access, while Time to Spare just has two roles: restricted and admin.
3. Beacon is able to easily create types of people (member, donor, etc), while Time to Spare can only accomplish this via its tagging feature.
4. Beacon has a customizable dashboard whereas Time to Spare does not, allowing staff to create dashboards with saved configurations according to their personal account.
5. Beacon is able to create more complex reports on more metrics than Time to Spare and does so more intuitively.
6. Beacon has a feature for task tracking, while Time to Spare does not.
7. With Beacon, it is easier to get more information on a client's profile if needed than Time to Spare because of its customizability and ease of use.
8. Beacon has powerful grant management and tracking tools that Time to Spare does not have.
9. Beacon forms are easier to create and more customizable than those in Time to Spare.
10. Time to Spare has a calendar function, while Beacon does not.

Technical Support

Beacon:

The technical support of Beacon consists of online resources, shown below.

Video Demonstrations (https://www.beaconcrm.org/video-demos)

- Introduction to Beacon video
- Donations and payments video
- Events video
- Memberships video
- Finance video
- Claiming gift aid video
- Importing data video
- Exporting data video

Article Guides (https://guide.beaconcrm.org/en/)

- Getting database started up (5 articles)
- Recording different types of data (19 articles)
- Working with data to do things like manage clients, payments, etc (15 articles
- Managing the database (23 articles)
- Importing data (18 articles)
- Exporting data (7 articles)
- Working with forms (18 articles)
- Collecting payments for memberships, donations, etc (19 articles)
- Gift aid (8 articles)
- Connecting other tools (12 articles)
- Keeping sensitive data secure (7 articles)
- Automating tasks (5 articles)
- Managing your account (8 articles)
- Connecting Beacon to organisation website or other internal system (1

articles)

Free Courses (https://lighthouse.beaconcrm.org/)

Lighthouse academy provides training courses on specific topics. These courses can strengthen staff knowledge of subjects through in-depth lessons from the Beacon team. The information is delivered through text and image formats, with an option for videos.

Talking with Staff

Beacon offers the ability to talk with staff directly on their website through messaging, or to schedule a call to help discuss any issues or problems that arise.

Time to Spare:

Talking with Staff

Time to Spare offers the ability to talk with staff directly on their website through messaging, and it is stated that they usually respond within 3 minutes.

Article Guides
(https://intercom.help/time-to-spare-4b6571a2deaf/en/collections/3195181-time-to-spare-for-community-groups-charities)

- Creating a bookable activity
- Adding or editing admins
- Restricted users and how they work
- Requesting volunteers / creating volunteer adverts
- Uploading spreadsheet of people
- Adding your details to network
- Insights and reporting on data
- Sharing registration forms

- How to create delivery routes
- A guide to filling in application forms
- Registration forms
- Member details
- Surveys and how to send them out
- Connecting to Stripe
- How to merge two profiles
- Recording outcomes
- Field types
- Calendar and events/sessions/activities
- Public events
- How to add or edit fields

Permissions

Beacon:

Beacon allows for more complex roles and restrictions. Users can have multiple roles if needed. Once a role is created, extensive permissions can be added that show which features and record types each role can use. There are three levels of permission on Beacon.

1. Forbidden - Completely off limits.
2. Read - Members can access that feature but not create, update, or delete anything.
3. Edit - Members have full permission to do what they would like.

An example of how these levels of permission are set is seen below in Figure 2.

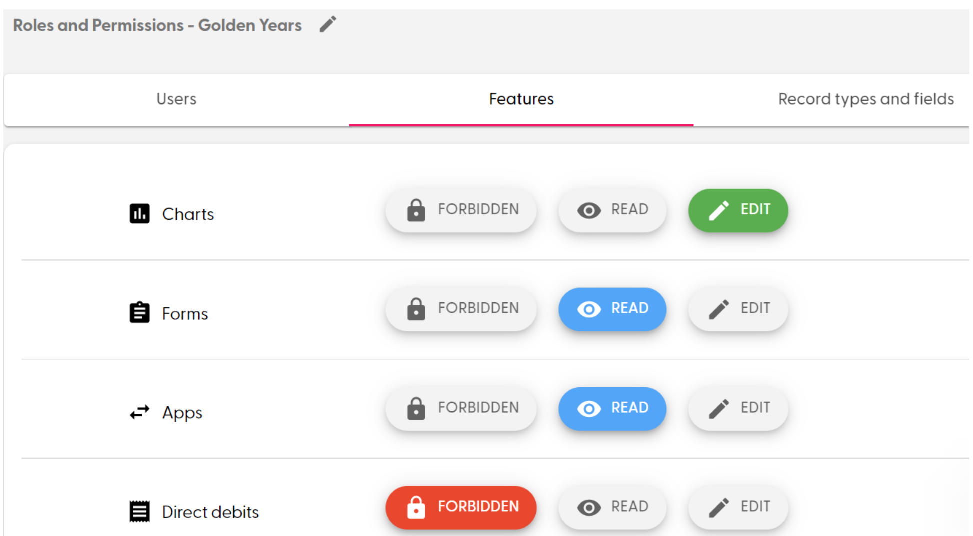


Figure 2 - Setting levels of permission for a user on Beacon.

Time to Spare:

Time to Spare has two different levels of access: general admin and restricted, as shown in Figure 3. Restricted accounts can do everything an admin can, except the following.

- See client/member/service user information (other than chosen fields)
- Create or edit registration forms

- Add information to client/member/service through register tab

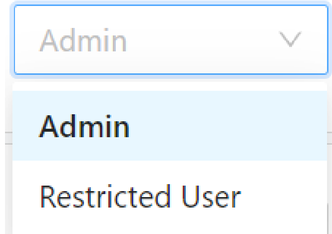


Figure 3 - Permission levels of Time to Spare.

Time to Spare also has the option for individual accounts to restrict comments on beneficiary profiles by making them private. Once made private, only the account which set it as private can access it. Using this method, users are able to add certain data as comments and privatise it manually.

Types of People

Beacon:

Beacon offers a variety of member types that can be selected when a person is added into the database. A person can be categorised as a volunteer, donor, fundraiser, member, beneficiary, event attendee, grant applicant, or other, as shown in Figure 4. This helps to quickly show one's involvement within an organisation.

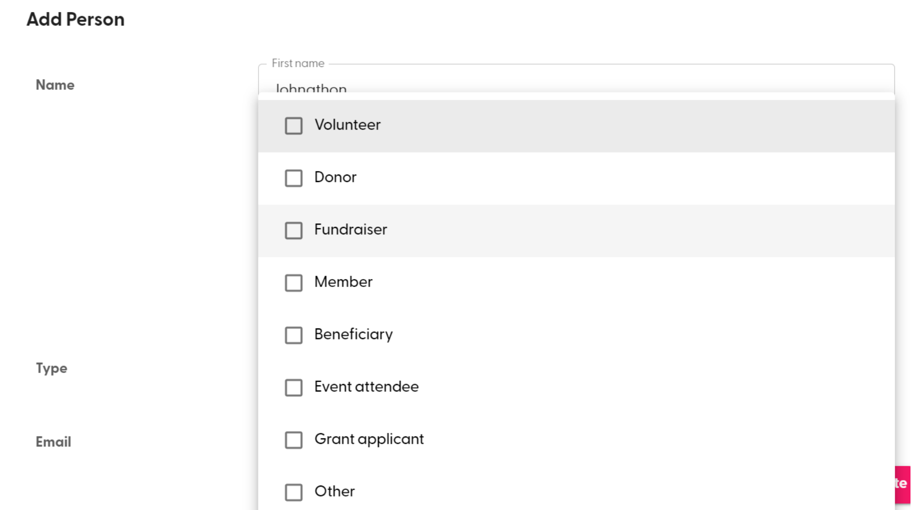


Figure 4 - Beacon Type Categories.

Figure 5 shows an example of how lists of people with their information will look in Beacon.

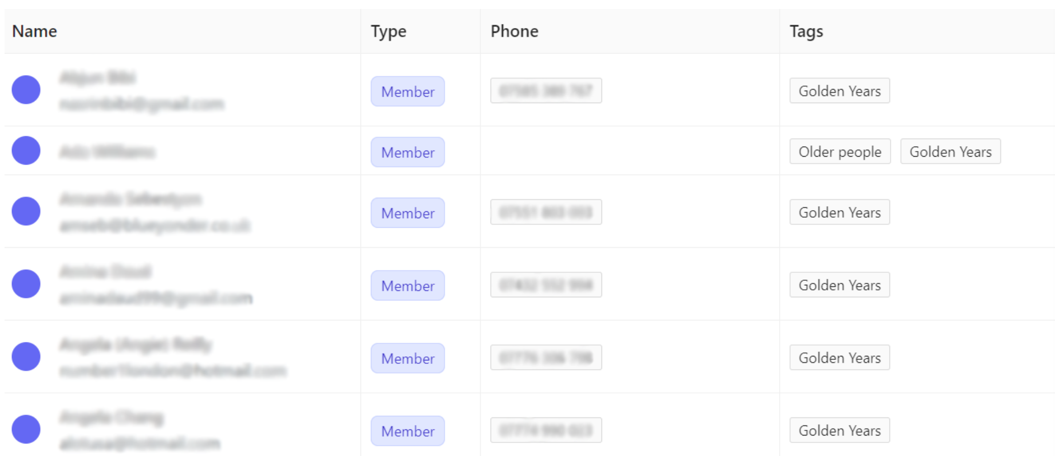
	Name	Email	Type
ES	Emily Smith	esmith1995@gmail.com	Volunteer
IT	Isabella Taylor	itaylor@gmail.com	Member
NL	Noah Lee	nlee123@gmail.com	Member
JJ	John Joe	jonjoe@gmail.com	Member
BW	Benjamin Wright	wright1benjamin@gmail.com	Fundraiser
LM	Liam Mitchell	liammitchell@yahoo.com	Donor

Figure 5 - Sample list of people in Beacon, along with their types.
All names were generated using an online name generator and do not reflect any real people.

Beacon allows users to be sorted by type, making it easy to find and access specific types of users.

Time to Spare:

Time to Spare has only a “Member” type. However, there are tags which can be used in place. For example, if someone is a donor, they can be tagged as such. In Figure 6 the tags represent events the users are involved in, but it could be utilised to describe their type as well.



Name	Type	Phone	Tags
[illegible]	Member	[illegible]	Golden Years
[illegible]	Member		Older people, Golden Years
[illegible]	Member	[illegible]	Golden Years
[illegible]	Member	[illegible]	Golden Years
[illegible]	Member	[illegible]	Golden Years
[illegible]	Member	[illegible]	Golden Years

Figure 6 - Sample list of people in Time to Spare, along with their types.
Any potentially sensitive information blurred for security purposes.

Time to Spare offers the ability to sort users by their tags, making it easy to find and access users of any specific type staff are looking to find.

Dashboard

Beacon:

Beacon has a fully customizable dashboard. A simple example dashboard with tasks, organisations created, activities, and people created is shown below in Figure 7.

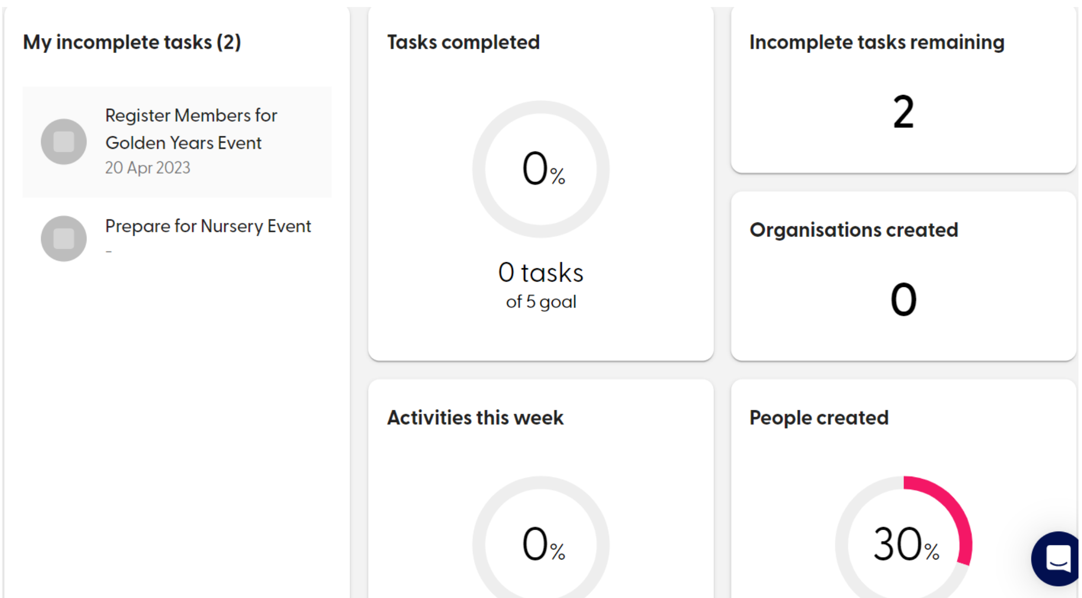


Figure 7 - Sample Beacon dashboard.

Beacon allows staff to create multiple dashboards on their account and switch between them as required. This is useful, as different staff members may want to focus on different types of information and metrics.

The first step to creating a dashboard is giving it a name. From there, staff are able to add “cards” to it that show different types of information. Each card has a name, and can be one of five types seen in Figure 8.

Figure 8 - Beacon card creation types.

Depending on the card type, one can choose from a list of record types to display the desired data, shown in Figure 9.

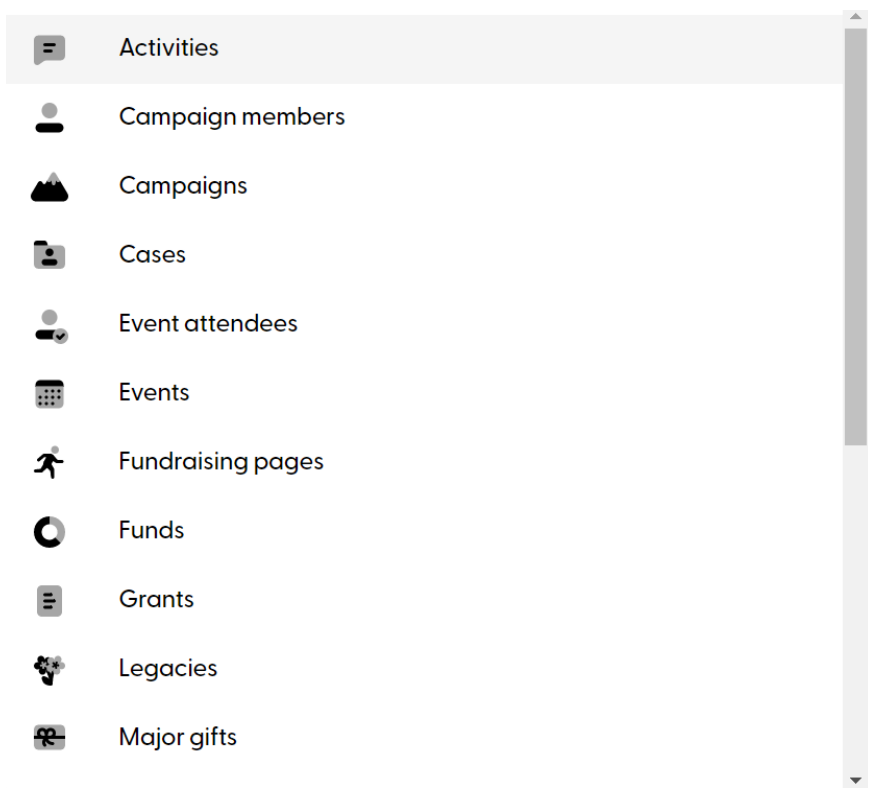


Figure 9 - List of record types for Beacon dashboard customization.

Finally, once this is created, one can choose a metric of how they want to summarise the information of the record type. For example, one could choose the number of records, sum of the records, or the average of the records. An example input (left) along with the card that it creates (right) is shown in Figure 10.

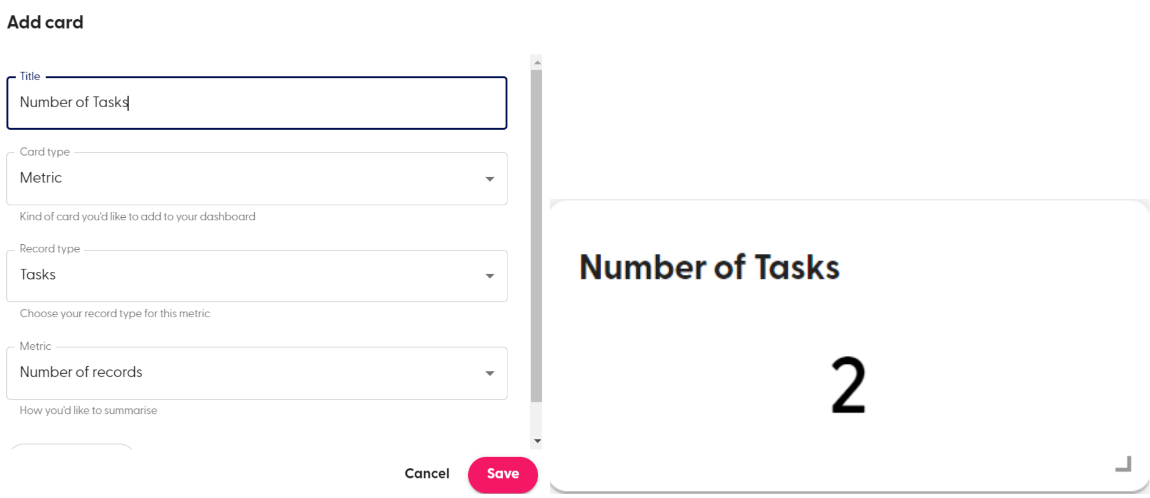


Figure 10 - Task creation in Beacon.

In sum, Beacon has more advanced options for dashboard customization and allows users to easily visualise organisational data.

Time to Spare:

Time to Spare has one main dashboard, which is shown below in Figure 11.

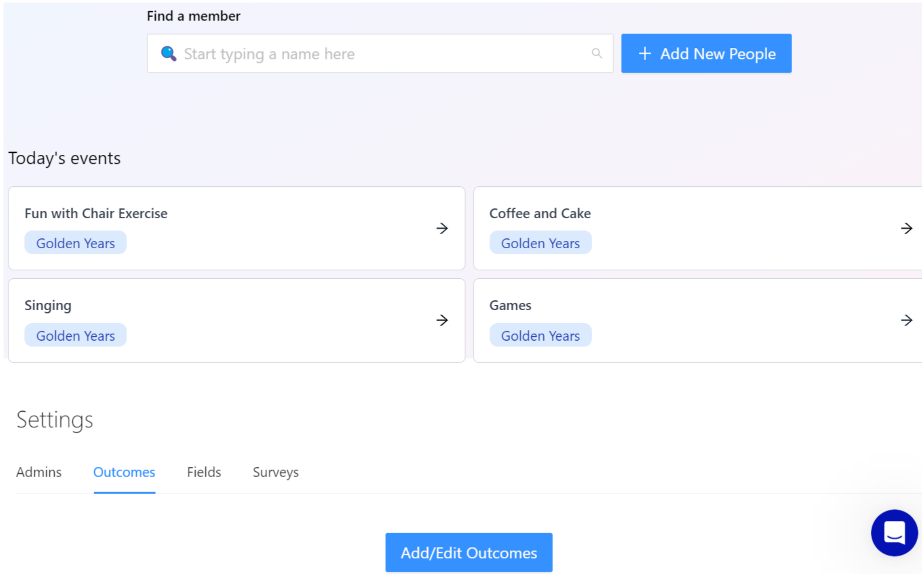


Figure 11 - Dashboard for Time to Spare.

This dashboard allows staff to find members, see today's events, and see things like Time to Spare organisation admins, outcomes of beneficiaries, fields, and surveys. While there are features available straight from the Time to Spare dashboard, the dashboard has no customizability or data visualisation.

Table 1 below shows some key differences and similarities in the dashboards of Beacon and Time to Spare.

Beacon Dashboard	Time to Spare
Add event / client information	Add event / client information
Allows multiple dashboard	Does **not** allow multiple dashboards
Add new cards to dashboard	Can **not** add new cards to dashboard

Table 1 - Beacon and Time to Spare dashboard comparison.

Reports

Beacon

Beacon allows one to create their own reports on a large number of metrics.

- Activities
- Campaigns
- Campaign Members
- Cases
- Events
- Funds
- Fundraising
- Grants
- Legacies
- Major Gifts
- Memberships
- Organisations
- Payment
- Payout
- Subscriptions
- Tasks
- Volunteer Applications

Below in Figure 12 is an example of a people chart report, grouped by month each was put into the system.

Figure 12 - Sample report of number of people in Beacon (Beaconcrm.org, 2023).

Beacon also offers more powerful ways to group different sets of data. For example, in the number of people metric, you can group people by the following, shown in Figure 13.

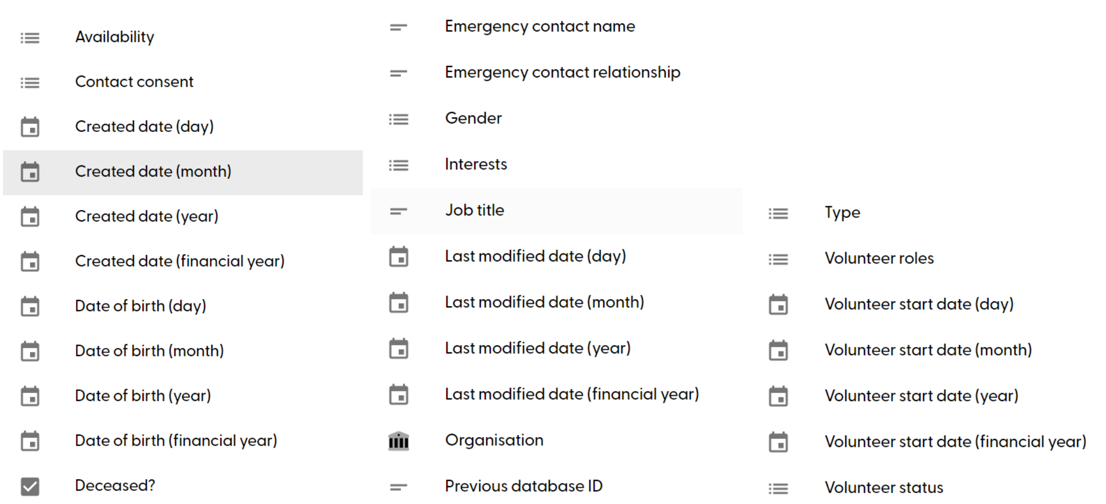


Figure 13 - Ways to group people in Beacon reports.

Time to Spare

Time to Spare provides 4 different templates for reports. The four templates are shown below.

- Number of user attendances
- Unique users over past 12 months

- Active users by borough
- Table of demographics and attendees over last 12 months

3 of these example templates are shown below in Figure 14.

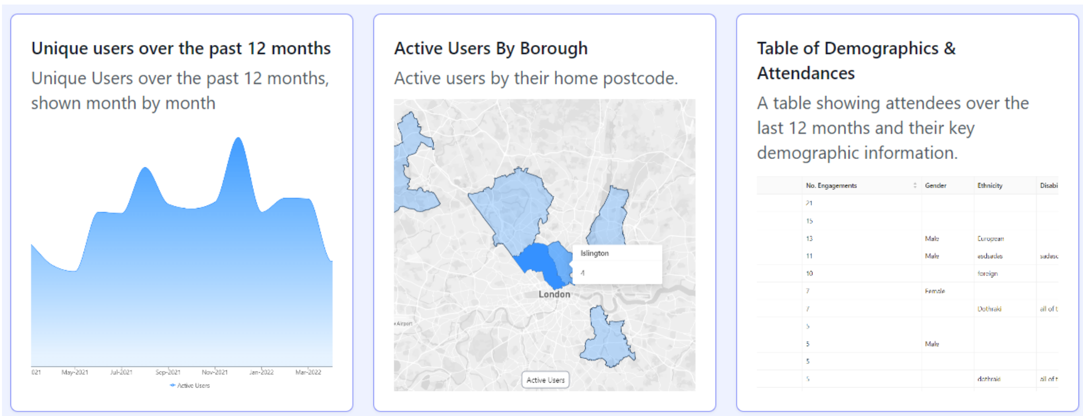


Figure 14 - Sample Time to Spare report templates.

Time to Spare also allows one to create their own report. The other reports that one can measure with Time to Spare are listed below.

- Active users
- Top users
- User attendance
- Activity count
- User information
- All user engagements
- Activity information

Overall, reports in Beacon are most customizable and also easier to create, as it can be done automatically. The reports in Time to Spare are more difficult and time consuming to create, as it requires staff to do more work and conditional tagging to generate reports, while the process is much more automatic and intuitive with Beacon.

Tasks

Beacon:

Tasks are a feature only available in Beacon and not in Time to Spare. Tasks allow staff within an organisation to have a better idea of what items (besides events) need to get done within the day, week, or month. Beacon allows the ability to add attachments to the task, notes, a due date, and information about what the task is related to. The task creation screen is shown below in Figure 15.

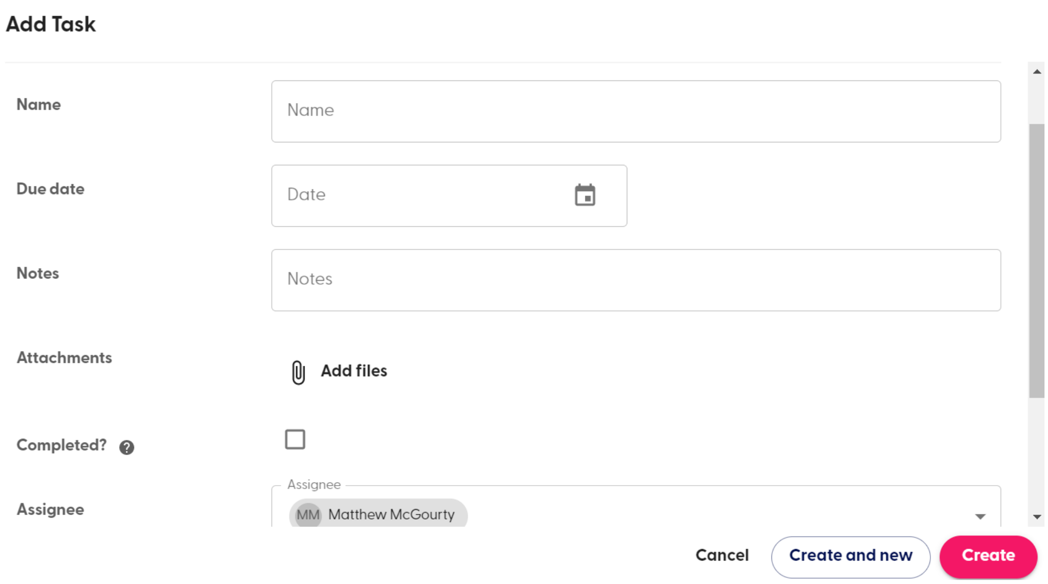


Figure 15 - Creating a task in Beacon.

Once added, lists of tasks and if they are complete or not will appear below in the Tasks screen, as portrayed in Figure 16.

Name	Due date	Completed?	Assignee
Prepare for Nursery ...	-	No	MM
Register Members fo...	20 Apr 2023	No	MM

Figure 16 - List of tasks in Beacon.

Beneficiary Data

Beacon:

When adding a person to the database, Beacon allows the following information to be inputted.

- Name
- Type (Member, Donor, etc)
- Email
- Phone Number
- Notes
- Address
- Deceased or alive
- Gender
- Date of birth
- File attachments
- Contact consent (email, phone, etc)
- Interests (events, volunteer opportunities, etc)
- Job title
- Organisation
- Facebook / Twitter / YouTube / LinkedIn / Website information
- Beneficiary notes
- Volunteer status

Once a person is created in the database, staff can see data held in the database on that person, along with items like their relationships to other members, tasks relating to them, their subscriptions, memberships, events, and total payments to the organisation. Part of a sample profile is shown below.

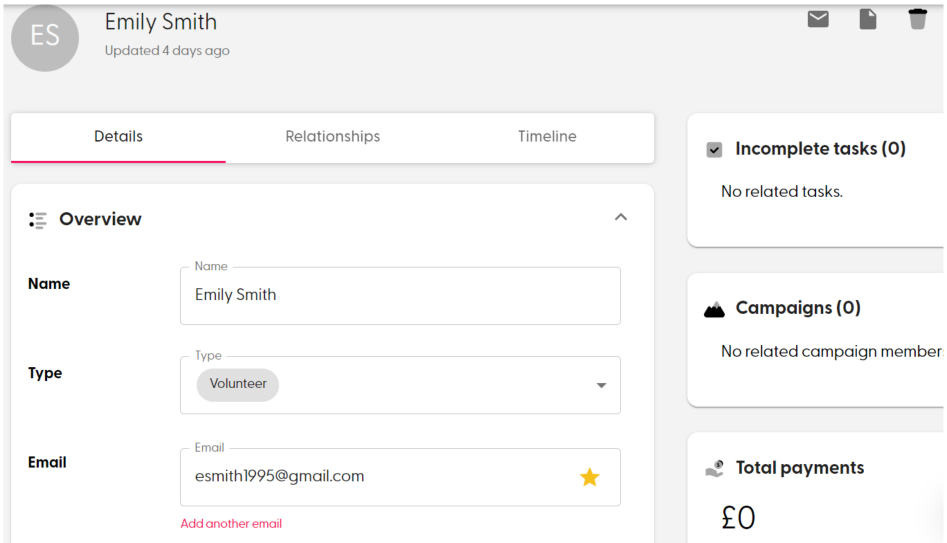


Figure 17 - Sample beneficiary information in Beacon.
All information was generated online and does not represent any real person.

Time to Spare

In Time to Spare, users are added by forms which automatically populate user data in the database. For example, the Golden Years membership form collects name, gender, and date of birth when a user fills it out, which is then used to create a new member in the Time to Spare database

When creating a form, staff can create their own questions and set the conditions of response acceptance by editing the type of response the question will accept. Although this may take more time to initially create a form that takes in all required user information than it would for Beacon, this way of gathering user information is highly customizable and can be used to get any information one would need about their users. A sample form being created is shown below in Figure 18.

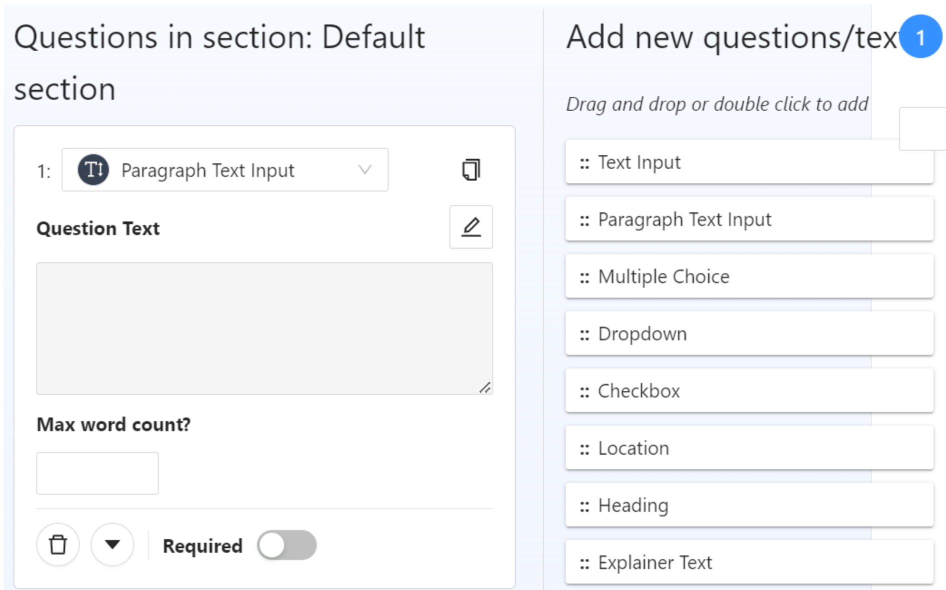


Figure 18 - Creating a form with Time to Spare.

A sample created form is shown below in Figure 19.

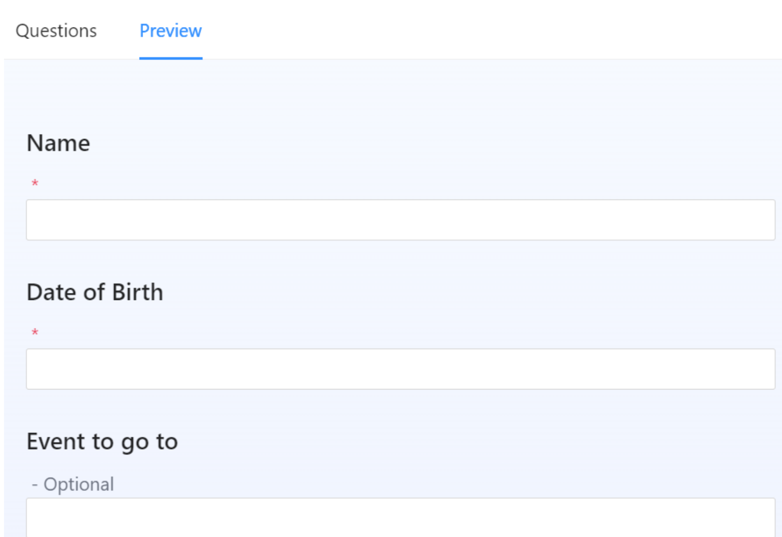


Figure 19 - Time to Spare sample form.

A sample Time to Spare beneficiary profile is shown below.

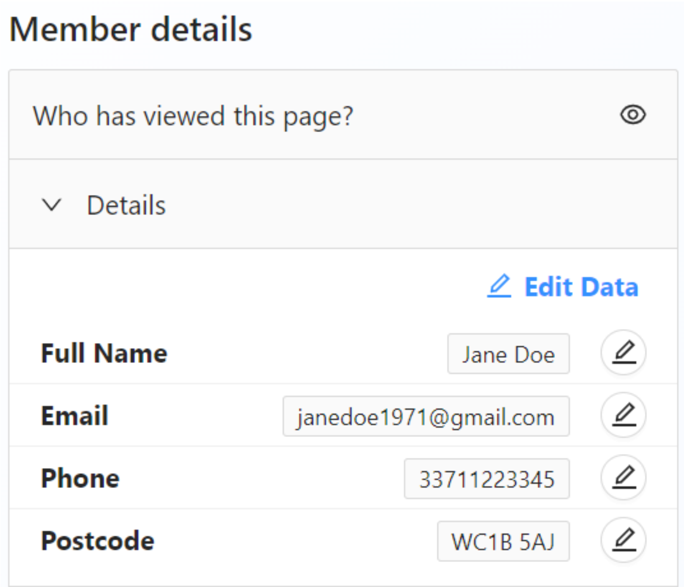


Figure 20 - Sample beneficiary data in Time to Spare.

All information was generated online and does not represent any real person.

Grant Management

Beacon:

Beacon has a powerful grant tracking feature, which can help keep track of grants within an organisation in a centralised location. When adding a grant to Beacon, a great quantity of information can be tracked, shown below.

- Names of grant
- Organisation potentially providing grants
- Stages of grant (new, research, in progress, submitted, won, lost, abandoned)
- Type of grant (general, capital, project)
- Primary contact for grant
- Confidence rating (out of 10 stars)
- Submission deadline
- Award date
- Funding period start
- Funding period end
- Reporting deadline
- Amount requested
- Amount granted
- Payment frequency (one time, quarterly, annually)
- Payment schedule notes
- Fund
- General notes
- File attachments
- Application website

Figure 21 portrays the Beacon screen that is used to create and track grants.

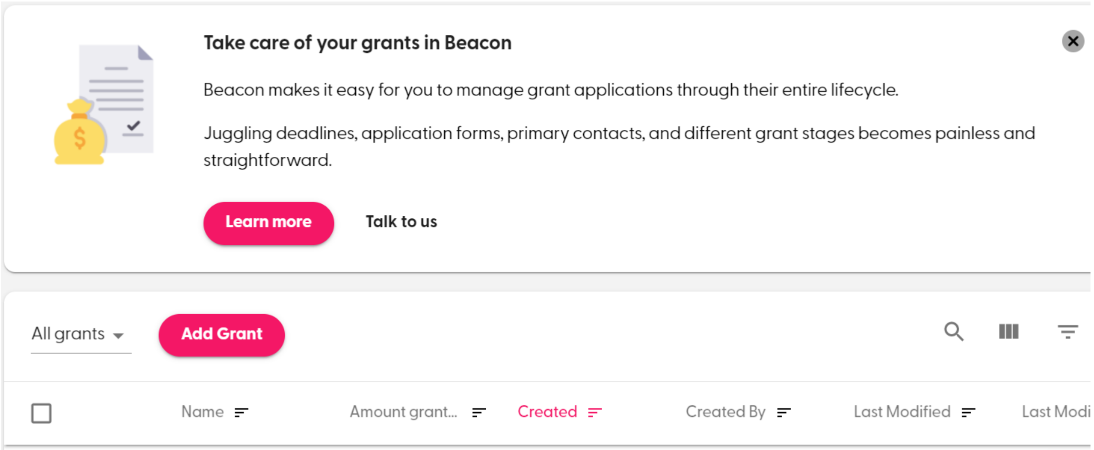


Figure 21 - Beacon grant screen.

A sample created grant is shown below in Figure 22.

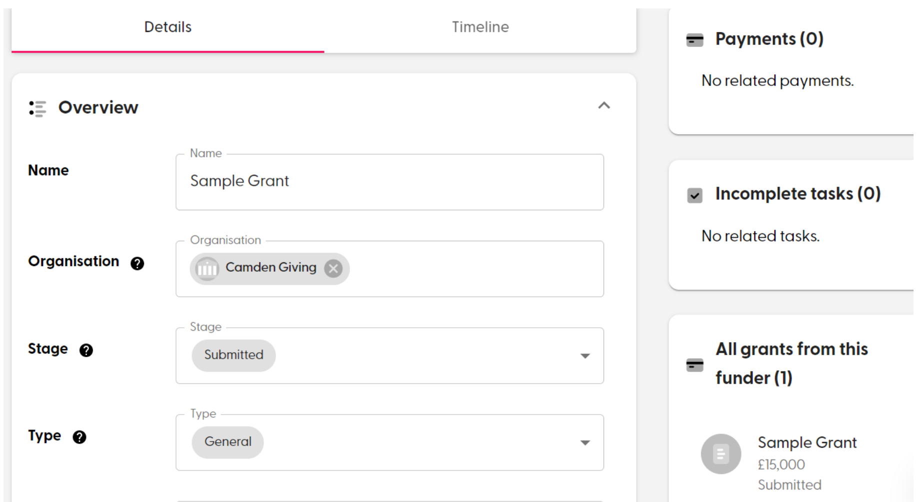


Figure 22 - Sample grant in Beacon.

This is an example and does not represent any real grant from an organisation.

Time to Spare:

Time to Spare does not have a similar grant management tool, but does allow funding applications to be tracked in the database with associated funding reports, shown below in Figure 23.

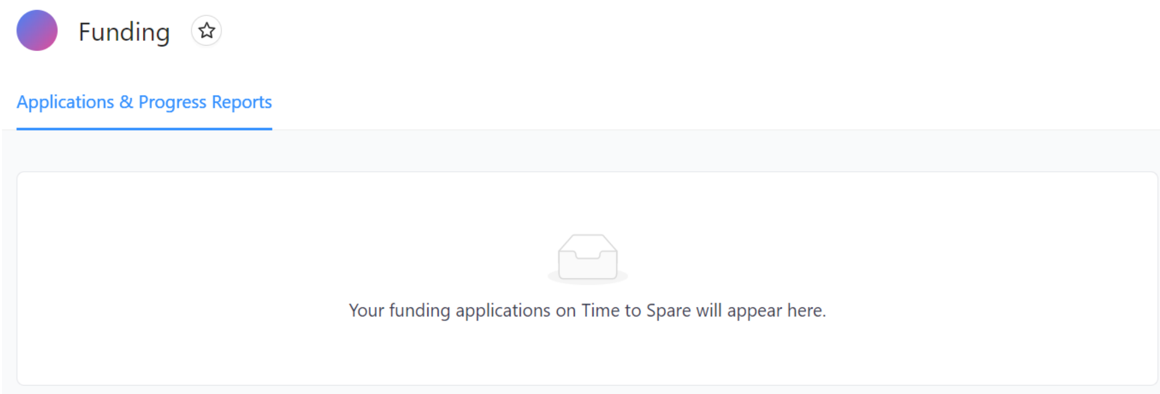


Figure 23 - Time to Spare funding application.

Forms

Beacon:

The forms for Time to Spare were touched upon in the Client Information section. Beacon provides for easier and more powerful forms to be created. A sample form being created is revealed in Figure 24.

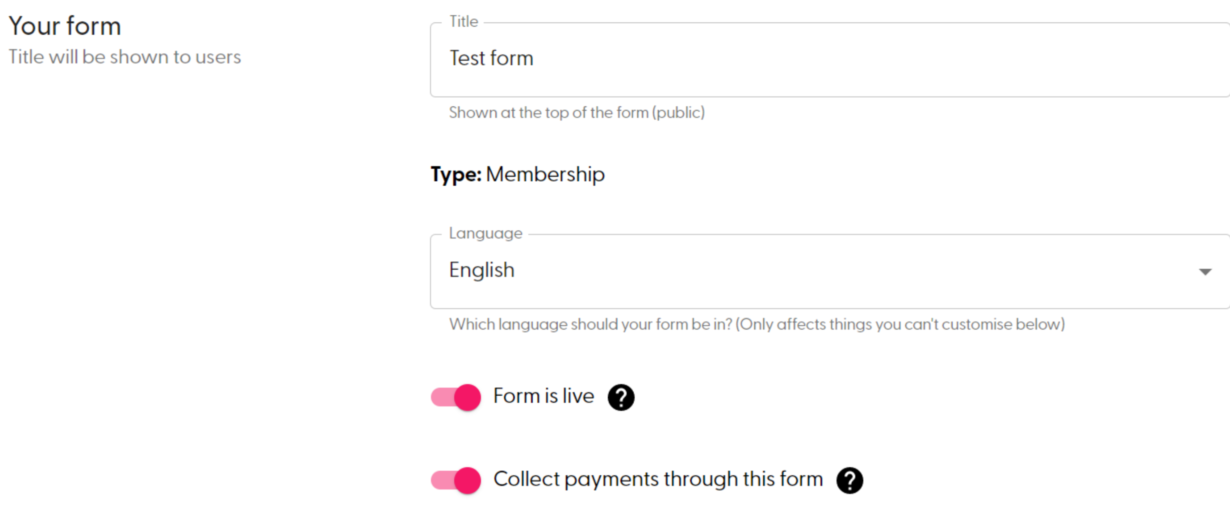


Figure 24 - Beacon form creation.

Beacon also allows for more form style customization, allowing full customization over logos, colour, and fonts involved in the form, shown in Figure 25.

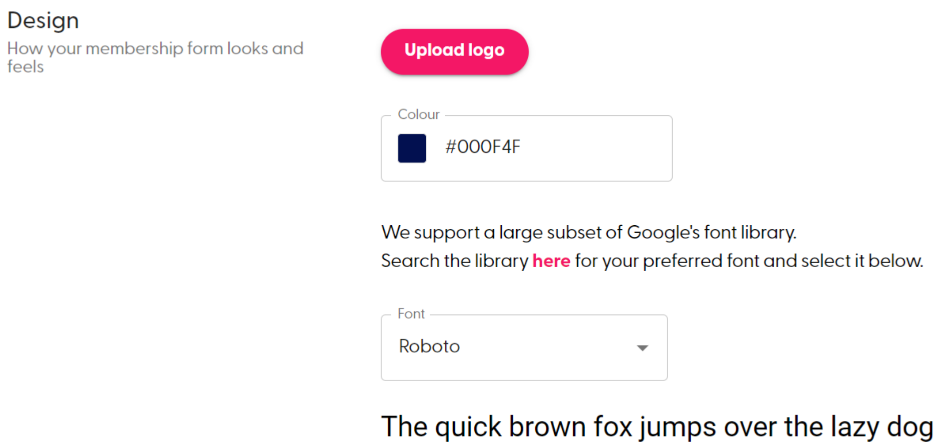


Figure 25 - Design of Beacon form.

A preview of a test form is shown below in Figure 26.

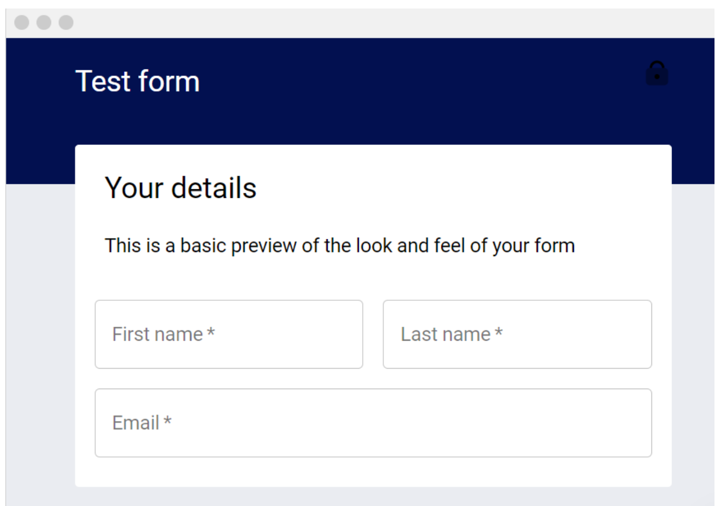


Figure 26 - Beacon form preview.

Beacon allows full control over the sections in the forms, as shown in Figure 27.

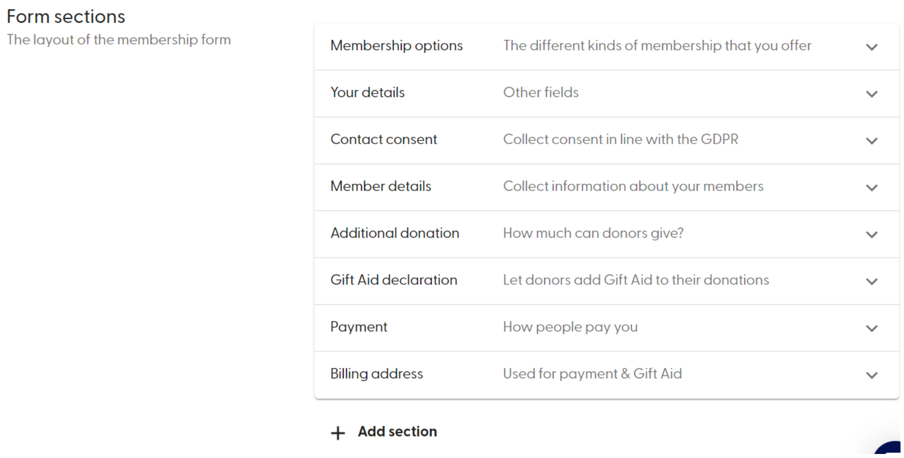


Figure 27 - Beacon form sections.

Beacon makes it easier to add sections, with four main types of sections that can be added, portrayed in Figure 28.

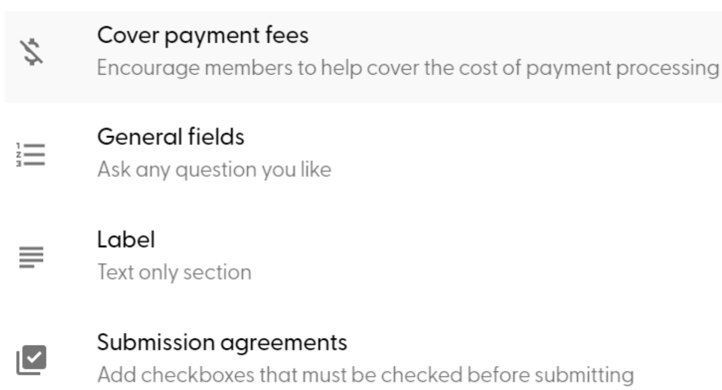


Figure 28 - Beacon main form section types.

Once created, all forms can be easily accessed on the Forms section of Beacon. Figure 29 shows how the forms will look once created on Beacon.

Name	Title	Type	Live	Created by	Last modified	Created ↓
Test form	Test form	Membership	✓	MM	11th Apr, 2023	11 Apr 2023
Golden Year Membership Form	Golden Year Membership Form	Signup	✓	MM	6th Apr, 2023	6 Apr 2023

Figure 29 - Beacon list of forms.

Calendar

Time to Spare:

Time to Spare has a calendar feature that Beacon does not have, which visualises event times, shown below in Figure 30.

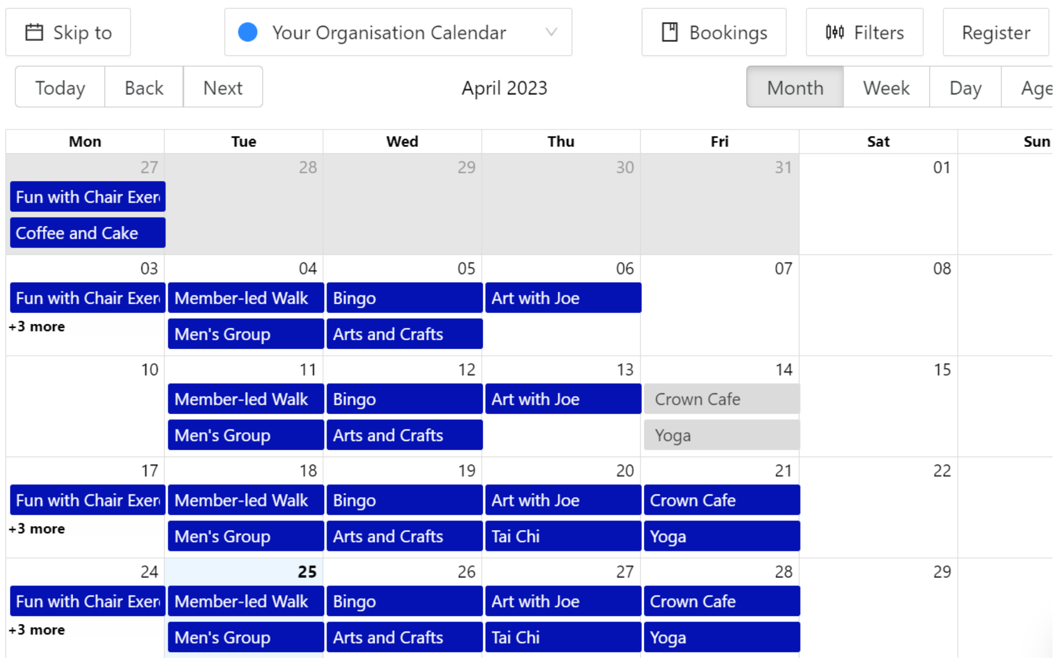


Figure 30 - Time to Spare calendar with Golden Years events.

Time to Spare allows staff to see a calendar with events for the whole month, week, or day. Staff can filter events by tags with the filters tab. It is also possible to create multiple calendars, so each staff member can have a calendar that fits events or items that they specifically need to do.

Conclusion

This document has aimed to compare Beacon and Time to Spare, and provide rationale for why the SPCA may choose to switch CRMs to Beacon if given the funds. The main differences found were in technical support provided, ways of tagging people, dashboard customization, report complexity, having tasks, tracking of beneficiary data, complexity of grant management, form customization, and the calendar feature. These differences may result in the SPCA moving up to Beacon one day if they so choose.