

- Workshop Handout -



DATAELEVATES

**Core Metrics Development & Data
Collection Strategies**

Table of Contents

1. **Defining Core Metrics**
 - a. [Slides](#)
 - b. [Additional Resources](#)

2. **Intentional Data Collection**
 - a. [Slides](#)
 - b. [Additional Resources](#)

3. **Better Data Collection**
 - a. [Slides](#)

- Part 1 -

Defining Core Metrics

Slides

Changing how we measuring learning

Two school districts in Texas serving high proportion of economically disadvantaged youth implemented a **data-driven culture** for improving student learning through **existing** and **new data sources**.

With this **new data**, they set **new metrics**, measured new ways of learning and **identified challenges** earlier on.

New metrics, new opportunities.



[Learn more about Data-driven Instruction here](#)

[Photo source and additional example of data-driven education](#)

Using Metrics to Tell Your Story

Every organization is telling a **story**. Metrics make that story **memorable**.

“ In 2023, 77 students graduated from our program, and 60% were from low-income households. ”

“ 75% of our female participants go on to choose STEM majors in college. ”

“ Our program satisfaction ratings among inner-city youth increased from 55% in 2022 to 71% in 2023. ”

What Are Core Metrics?



Core Metrics

/kɔːr metrɪks/

noun

- A metric is a **quantifiable measure** that is used to track and assess an aspect of an organization's **performance**. Today, metrics are often referred to as **KPIs**.
- **Mission Metrics**: Measure the quantifiable change the organization's work has had on stakeholders' lives.
- **Business Metrics**: Measure the efficiency and effectiveness of an organization's operations & processes.

Defining Your Core Metrics

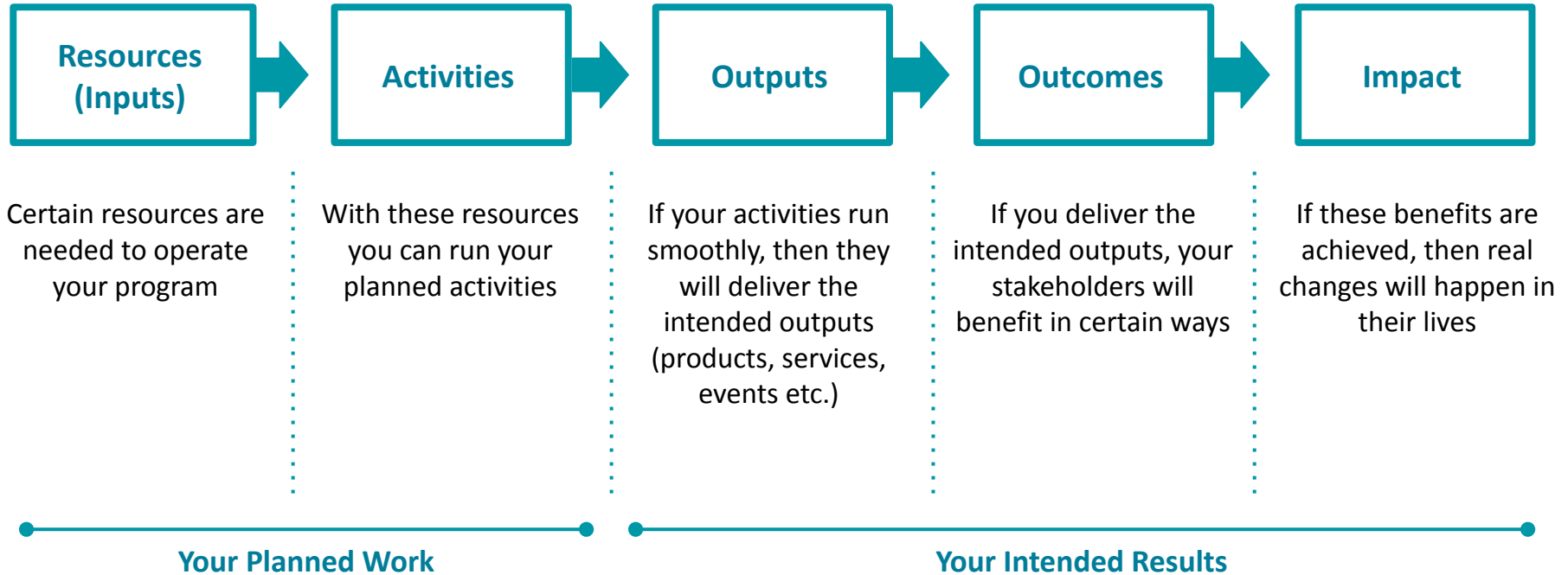
If core metrics help you tell the story of your work, **what do we need to include in that story?** Start by answering these questions.

- What **resources** did we have?
- What **did we do** with them?
- What was **achieved**?
- How did this **improve** the world?



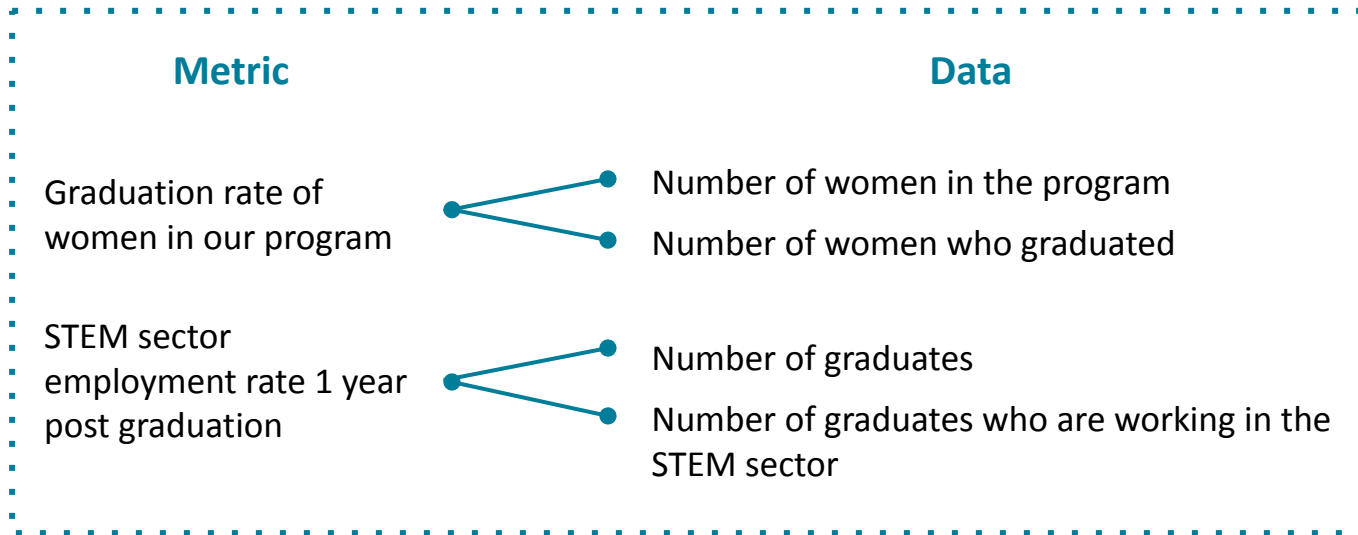
A logic model for your program can help you **answer these questions** and find the **core metrics** at the same time.

Logic Model



Using Metrics to Define Data Needs

While a **data with context** can be used as a metric, a metric can also be a **combination** of multiple data points.



Disaggregation Data Points

Measuring diversity and inclusion in social impact programs is essential to **assess the effectiveness and equitable nature** of these programs, and identify **areas for improvement**. Critical data to capture for **measuring diversity & inclusion** can include:

- Demographics
 - Age
 - Gender
 - Race/Ethnicity
 - Disability Status
- Socioeconomic Status
 - Income
 - Education
 - Employment Status
- Geographic
 - Location
- Language
 - Primary Language
- Satisfaction and Perception
- Retention and Dropout
- Representation in Leadership Roles
- Community Engagement

- Part 1 -

Defining Core Metrics

Additional Resources

SMART Goals & Metrics



SPECIFIC

The goal is concrete and tangible, everyone knows what it looks like.



MEASURABLE

The goal can be measured in a way that everyone can understand.



ACTIONABLE

The goal is challenging but achievable with available resources.



RELEVANT

The goal meaningfully contributes to objectives and the overall mission.



TIME BOUND

The goal has a deadline and time-based milestones to track progress.

[More resources on SMART Goals here](#)

SMART Goals & Metrics

SMART is a technique used to set goals personal and professional settings. When goals are SMART, meaning that are **Specific, Measurable, Actionable, Relevant** and **Time bound**, they are more likely to be achieved. The SMART technique can be used when applying metrics to organizational objectives as well.

Examples

By the end of 2024, we will increase our operational budget by 10% by receiving funding from 2-3 new funders.

By the end of 2024, we will increase our post-graduation employment rate from 70% to 80% by partnering with a minimum of 3 new employment partners.

Aligning Data Collection With IDEA Principles

Data collection, like all organization process, should be designed with the **principles of IDEA** (Inclusion, Diversity, Equity, and Accessibility). As we work towards more data-driven organizations, we need to ensure that all data process, from collection to analysis, **uphold these principles**. You can find some resources that dive into this subject below.

- [Apra Ethics and Compliance Committee Diversity, Equity and Inclusion \(DEI\) Data Guide](#)
- [How to collect and share DEI data](#)
- [DEI Data: Use Data to Achieve Your DEI Objectives - AIHR](#)

Publically-Available Datasets for Benchmarking & Research

Publicly available datasets can serve as **valuable benchmarks** to assess and **improve organizational core metrics**, offering a basis for comparative analysis and performance evaluation. Some datasets you can use in your organization are:

General

- [Data.gov](https://data.gov)

Demographics and Economy

- data.census.gov
- [Bureau of Labor Statistics Data Finder](https://www.bls.gov/data/)

Education

- [U.S. Department of Education Public Data Listing](https://nces.ed.gov/ipeds/data/)
- [National Center for Education Statistics DataLab](https://nces.ed.gov/ipeds/datacenter/)

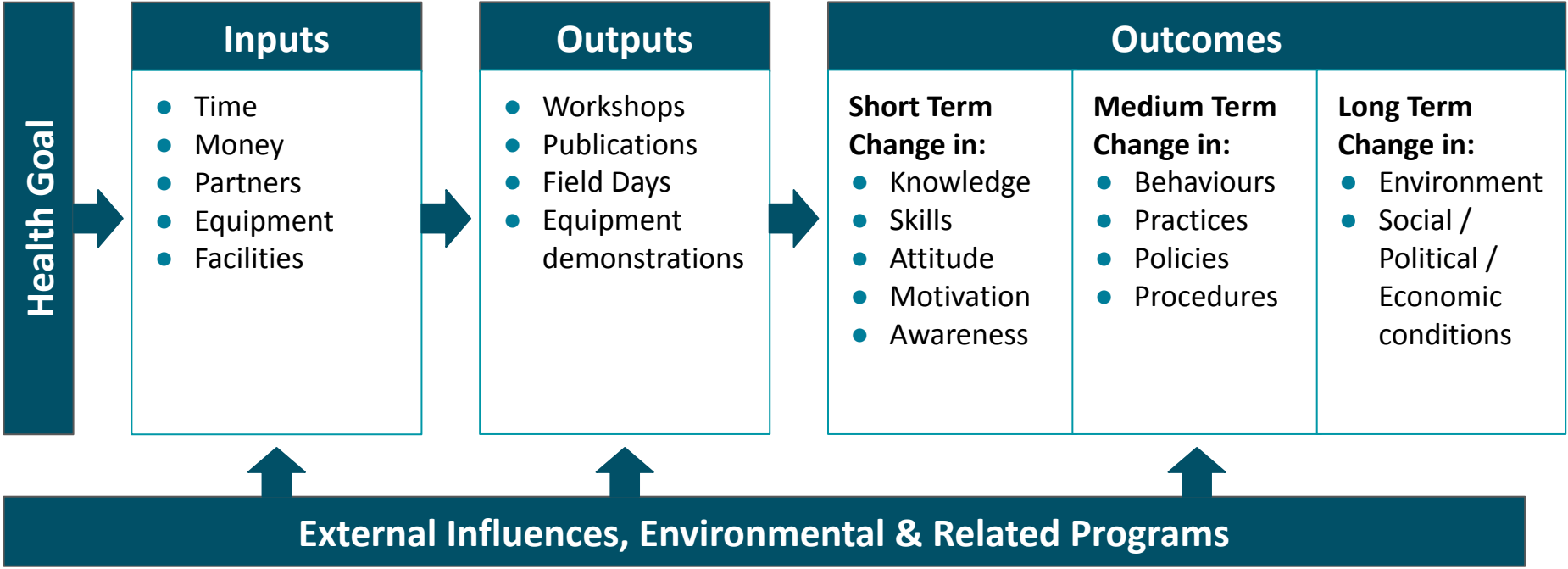
Health

- [HealthData.gov](https://healthdata.gov)
- [Health & Social Determinants of Health - LibGuides](https://www.libguides.com/health)

Local Food Systems

- [data – Local Food Economics](https://data.org/local-food-economics)

Generic Logic Model

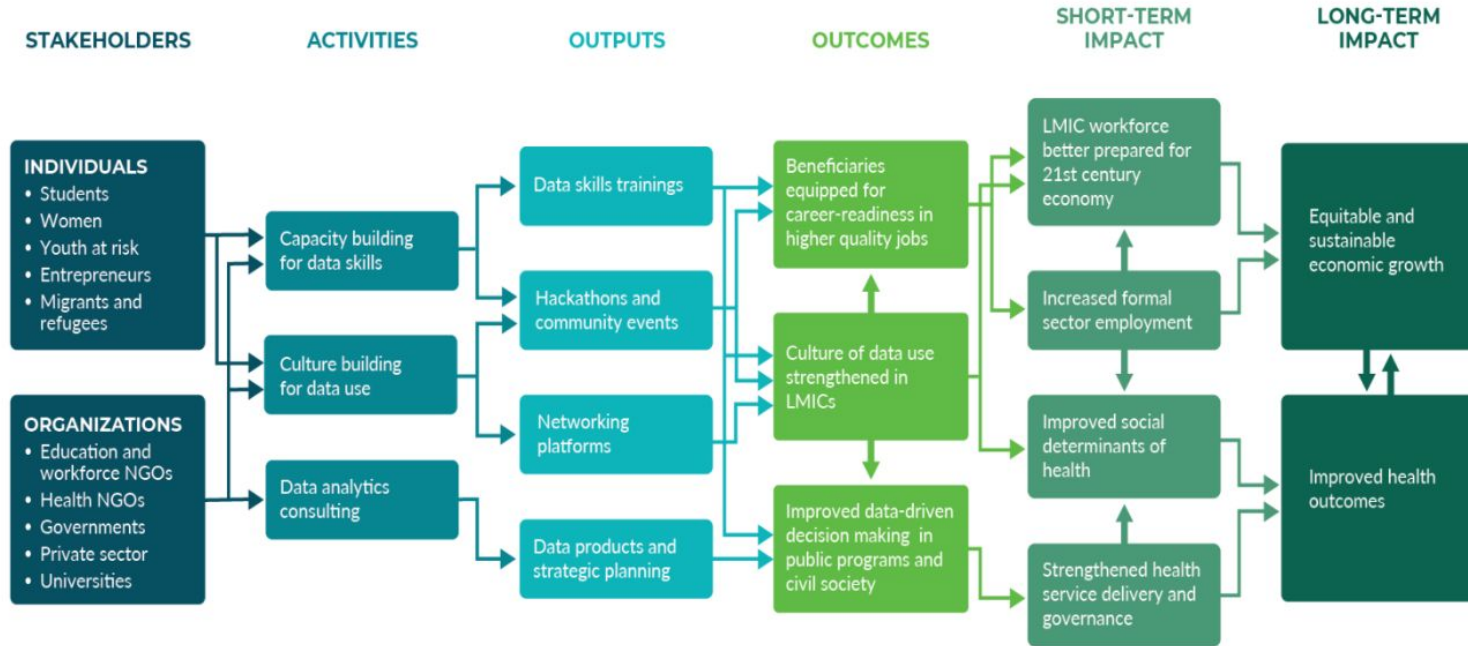


Data Elevates' Logic Model



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LOGIC MODEL



Workshop Activity Instructions: Logic Model



Description: Define metrics that are directly linked with your core impact and activities, and the data you need to calculate those metrics.

1. Write the **'impact you want to see'** for both the Long Term Impact and Short Term Impact (outcomes), and the **'activities you want to see'** for your organisation (outputs). These should be one sentence each, including metrics when possible. **(Happening in Row 7)**
2. Write the **metrics** that will help you measure if that impact (or activities) are being reached. **(Happening in Columns G & M)**
3. Write the **disaggregations** that you will measure to ensure that each impact is being reached in a way that is inclusive and equitable. **(Happening in Columns H & N)**
4. Finally, write the **data points** (including the disaggregations) that are required to measure each metric. **(Happening in Columns I & O)**

Workshop Activity Templates (Logic Model & Data Collection)

Links to Activity Templates:



[Box Version](#)



[Excel Version](#)



[Google Sheets Version](#)

Note: When accessing these templates please 'download' or 'make a copy' of your preferred format. If you would like to access the version you worked on in the workshop please contact the Data Elevates team directly.

- Part 2 -

Intentional Data Collection

Slides

How Do You Collect Your Data?



A great deal of data is collected through **daily work processes**. Many organizations **collect data without realizing it**.



Some data needs to be **actively collected**. Ad-hoc or regular, all these activities require **intentional data collection**.

Objective-Driven Data Collection

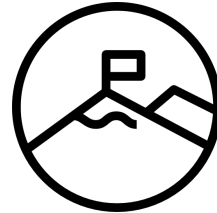
Before you set out to **collect data**, you must first set **clear objectives** for the data being collected. Having clear objectives for data collection...



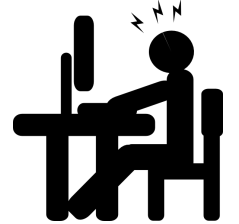
Ensures Purposeful
Data Collection



Leads to optimized &
measurable analysis



Aligns with business or
mission-based goals



Reduces the danger of
wandering

Primary Data Collection Methods

Method	Sample Size	Data Type	Purpose
Operation Records	Variable	Quantitative & Qualitative	Track activities
Baseline Questionnaires	10+	Quantitative	Get to know people & their needs
Surveys	10 - 1000+	Quantitative	Discover trends

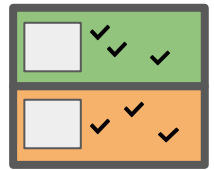
Primary Data Collection Methods

Method	Sample Size	Data Type	Purpose
Interview	1-10	Qualitative	In-depth understanding
Web Tracking	Variable	Qualitative	Relationship between users & an interface
Focus group	5-10 per group	Qualitative	Uncover and explore new ideas

- Part 2 -

Intentional Data Collection Resources

Workshop Activity Instructions: Data Collection



Description: Identify if your current data collection tools are adapted to the data you need to collect, and if you are optimizing the data that is being collected.

1. Ensure that you have **written all the data points** you need for each metric in **Columns I & O in the logic model activity**.
2. Identify how you are currently **collecting the data point** using the options in **Columns F through M. Take notes** as needed.

Tips: If data points **appear multiple times**, simply take note. This may mean that you are doing a good job of **optimizing that data point**. If you do not know how you are collecting a data point it may mean that the data point is not specific enough, or that it is simply not being collected at this time (in this case **identify the ideal collection tool** and take note).

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Getting Better Data With Better Questionnaires

Questionnaires are a common tool for data collection. A questionnaire may take the form of an **application form**, an **enrollment form**, a **survey** etc. In short, it is a tool that uses questions to collect data from stakeholders. However, questionnaires can be viewed as **burdensome** for those answering and, when not done properly, can collect **misleading information**.

You can discover some best practices on designing powerful questionnaires and surveys via [Survey Monkey](#) and [Qualtrics](#). We have also prepared tool **(on the next page)** that you can share with your teams for a data driven questionnaire design process.

Designing Data-Driven Questionnaire

Step 1. Setting Objectives: Set clear objectives for your questionnaire. What are you trying to learn? How will the information being collected be used?

Step 2. Write questions: When writing questions, put the most important questions first. As you write them, constantly check if they are directly linked to the the objectives.

Step 3. Quality Check: If a question is not linked to an objective, it may be better to remove that question, or revisit the objectives. If one objective is checked frequently, you may want to see if the questions can be reduced.



[Box Version](#)



[Excel Version](#)



[Google Sheets Version](#)

- Part 3 -

Better Data Collection

Slides

Data Collection: When and How Often?



Align data collection timeline with the corresponding objectives, and **leave a buffer** for analysis.



When monitoring trends over time, **create a process** to collect the same type of data (in the **same format**) on a planned frequency



Typically, data for outcome and impact metrics is collected much **less frequently than for inputs & outputs**. Plan your data collection accordingly.

Data Collection: When and How Often?

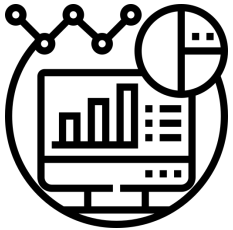


Make **realistic data collection processes** by considering your team's budget and staffing constraints.



Understand the level of **survey burden** the people you are collecting data from will be dealing with at all times. **Adjust the frequency** of data collection “asks” based on this.

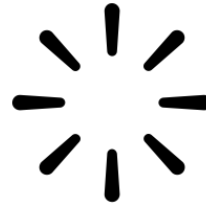
Better Data Collection



Know how the data will
be displayed



Use digital data collection
tools to ensure consistency



Respect informed consent &
data minimization



Clean data before
analysis to reduce errors



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Thank you!