

Data Challenges Survey

July 2021 version

Instructions

On the following two pages, we have provided a sample survey that uncovers some of the data challenges facing your nonprofit staff.

The questions are divided into three categories:

- *Self-assessment* questions help you understand more about how your staff perceives their own data skills.
- *IT assessment* questions help you understand whether changes to your IT systems will yield improvements.
- *Process or operations* questions help you understand how your processes impact data.

Add up the total scores for each category. The categories with the lowest scores could be a good place to focus your next steps.

For example:

- **Low self-assessment scores** could be addressed through data training.
- **Low IT assessment scores** could be addressed through system improvements or greater IT investments.
- **Low process scores** could be addressed through process documentation and improvement measures.

Credits

This survey is free to use and provided by January Advisors (www.januaryadvisors.com). We provide strategic planning and data training services for nonprofits. Please visit our website for more information about our company.

Self-Assessment Questions

Do you consider yourself a data person?

1	2	3	4	5
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1 - Not really / 3 - I'm ok with data / 5 - Totally

Are you able to get insights from the data you collect?

1	2	3	4	5
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1 - Not really / 3 - Only enough to report key statistics / 5 - Yes, I learn new things every day in my reports

Do you find it easy to share data insights with others?

1	2	3	4	5
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1 - Not really / 3 - Only enough to report key statistics / 5 - Yes, I regularly share new insights with the team

In the reports that you use, do you know what every field means?

1	2	3	4	5
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1 - I know some fields / 3 - I know most fields / 5 - I know what every field means, without exception

Do you ever generate pivot tables or transform data in Excel?

1	2	3	4	5
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1 - No, or I don't understand the question / 3 - I've done it before, but not regularly / 5 - All the time

Do you feel like the data you collect relates to your org's mission?

1	2	3	4	5
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1 - No / 3 - Sometimes, but not all the time / 5 - Virtually all of the data is mission-related

IT Assessment Questions

Do you find it easy to generate reports?

1	2	3	4	5
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1 - No, reports are a huge challenge / 3 - Some reports are easy, some are not / 5 - All of my reports are pretty easy to generate

Do you find it easy to input data into a spreadsheet or system?

1	2	3	4	5
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1 - No, I manually enter a lot of data / 3 - I enter some data, and it could be better / 5 - Most of my data is automated

Do you feel like you've had enough training on your data systems?

1	2	3	4	5
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1 - No, I don't really understand how the system works / 3 - I could improve my knowledge / 5 - I am totally up to speed

When you have a data concern, are you able to get help from IT?

1	2	3	4	5
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1 - No, or we don't have IT / 3 - I get help, but it takes some time / 5 - IT is very responsive to my needs

Do you track data in a system that isn't managed by IT?
(e.g. Excel spreadsheets, post-it notes, paper files, etc.)

1	2	3	4	5
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1 - Most of my information is outside of IT / 3 - Some data isn't managed by IT / 5 - Everything is in the system

Is it easy to add new fields or update your data management system?

1	2	3	4	5
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1 - No, everything is customized / 3 - It's possible, but it's not easy / 5 - Yes, our system is very flexible

Process or Operations Questions

How often do you manually copy data from a form to a system?

1	2	3	4	5
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1 - Very often / 3 - From time to time / 5 - Never

Do you often use your data to inform the work you are doing?

1	2	3	4	5
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1 - No, I collect data for others to see / 3 - Sometimes I look at data and make changes / 5 - Data is essential to my work

Do you feel like you collect unnecessary data?

1	2	3	4	5
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1 - Yes, I don't know why I collect it / 3 - Some of the data I collect doesn't seem useful / 5 - No, the data I collect is essential

When you collect data, are you collecting it the same way every time?

1	2	3	4	5
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1 - My process changes frequently / 3 - My process changes every so often / 5 - My process never changes

Do you feel like you track the most important data for your job?

1	2	3	4	5
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1 - No, the data I collect is not helpful / 3 - Some of the data I collect is helpful / 5 - Yes, the data I collect is very helpful

Are you able to provide data requested by your management/board?

1	2	3	4	5
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1 - No, they request data that I don't have / 3 - I can transform my existing data to meet their requests / 5 - It's easy for me to supply them with the data they want