Data Workshop 4
Best Practices for Data Management

Tuesday April 18, 2024 | 4.30 PM - 6.00 PM
Agenda

- Introduction to AAHI Mission, Goals and Services (Samila Aryal Bhattarai)
- Best Practices
  - Data Governance
  - Organization Spotlight - Chinese Culture & Community Service Center, Inc (CCACC)
  - Organization Spotlight - Vietnamese American Services (VAS)
- Creating a Data Culture
Asian American Health Initiative (AAHI) Mission

To improve the health and wellness of Asian American communities in Montgomery County by applying EQUITY, COMMUNITY ENGAGEMENT, and DATA-DRIVEN approaches.
AAHI’s Asian American Center of Excellence (AACE)

- The goal of the AACE is to support Asian American-serving CBOs and FBOs in developing and increasing their capacity to successfully provide health, wellness, and social support programs and services.
- AACE services include:
  - Micro-grants for AAPI-serving organizations to build organizational capacity
  - Bi-weekly curated email digest for AAPI leaders
  - Networking opportunities for leaders of AAPI-serving organizations
  - Data roundtables for AAPI leaders
  - Data collection and analysis workshops
  - One-on-One data strategy consultations
Join the AACE Email Digest!

Link to join: https://lp.constantcontactpages.com/su/1J8XPmW/AACE

Or scan the QR Code!
Introduction

- Overview
- Learning Objectives
  - Data Governance - important processes and policies
  - Organization Spotlights
    - CCACC
    - VAS
  - Creating a data culture
Your Data Strategy

- CRM
- Spreadsheet
- Shared drive
- Reporting software
- Internal reporting
- External communication
- Grant Reporting
- Social Media
- Client demographics
- Attendance
- Surveys
- Assessments
- Was my program successful?
- Was my program successful?
- What is the impact of my program?
- Has my program grown?
- Who are we serving?
- Was my program successful?
- What is the impact of my program?
- Has my program grown?
- Who are we serving?
- What do you want to know?
- What will you collect and how?
- How will you store & manage your data?
- How will you use your data?
- What do you want to know?
- What will you collect and how?
- How will you store & manage your data?
- How will you use your data?
Data Governance

5 Pillars of Data Governance

<table>
<thead>
<tr>
<th>Accountability</th>
<th>Policies</th>
<th>Data Administration</th>
<th>Data Quality/Validation</th>
<th>Transparency</th>
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</thead>
<tbody>
<tr>
<td>• Roles</td>
<td>• Data Security</td>
<td>• Ensure policies are being followed</td>
<td>• Process for validating data</td>
<td>• Internal</td>
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<tr>
<td>• Responsibilities</td>
<td>• Data Access</td>
<td>• Approves data access</td>
<td>• External</td>
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</table>
Data Governance - Accountability

Who is going to be owner of this and have ultimate responsibility

- Ideally more than 1 person from more than 1 department for larger organizations
- Larger organizations might have a team made of representatives from different departments

Role

- Develops processes and policies for the organization
- Ultimately responsible for ensuring policies and processes are adhered to
Data Governance – Key Policies

- Data Governance Policy
  - Outlines the data governance structure of the organization along with roles and responsibilities
  - Governance must be connected to ROLES not individuals

- Data Access Policy
  - Who can access what data and under what circumstances
  - How staff can access data
  - What training must staff have in order to access data

- Data Usage Policy
  - How is data going to be used
  - What technology can be used to access data - hardware, software, wifi, etc

- Data Security Policy
  - Use of encryption and password protection
  - Where data can be saved and on what hardware
  - Backups and data sharing agreements
Data Governance - Data Administration

- Responsible for ensuring day to day implementation of policies
  - May fall to one individual or to many
  - Approves/Removes data access as appropriate
  - Ensures staff are trained on data policies
  - Audits to ensure data security measures are in place
  - Document the process - who is responsible for what activities
Data Governance - Data Quality/Validation

- Quality Assurance and Validation
  - Routine process for checking accuracy of data prior to reporting
  - Specific roles with timeframes
  - Looks for significant changes in trends, duplication of clients, unlikely values, missing data
  - Document the process - who is responsible for what activities
Data Governance - Transparency

- **Internal**
  - Train all staff on data policies
  - All staff should be aware of what data is collected and how it is kept secure

- **External**
  - Ensure clients understand what data is being collected and how it is protected and used
  - Consider including information on consent form/rights and responsibilities form
  - Document trainings and activities - sign off sheets
Organization Spotlight

Chinese Culture and Community Service Center, Inc (CCACC)

Yushin Chou
Vietnamese American Services (VAS)

DATA PRACTICES
DATA ANALYSIS

Q1 2024 Unique Served

Unique Count of Contact ID

- Adult Day Care (ADC): 79
- Clubs & Activities: 201
- Senior and Low-income Family: 228
- Healthcare: 230
- English Class: 33
- Jobs: 28
- Immigration: 31
- Other: 7

Q1 2024 all Services

Record Count

- Adult Day Care (ADC): 301
- Clubs & Activities: 908
- Senior and Low-income Family: 1.5k
- Healthcare: 301
- English Class: 182
- Jobs: 29
- Immigration: 32
- Other: 7

View Report (Q1 all services)
Creating a Data Culture

- Embed data driven decision making into your organization
- Use your data to move your programs forward
- Celebrate success and learn from your challenges
- Keep the wheel turning
Sharing your data

Least
Level of Detail
Most

Leadership & Board, Annual Report, Organization Level Community Storytelling
Senior Management, Funders, Program Specific Community Storytelling
Program and Operational Teams, Quality Improvement Activities
Identify and Implement Improvements

- Use the principles of quality improvement to keep building
- Starting with an identified challenge - plan an improvement and move through the cycle
- START SMALL - something you can change and review in a week or 2
- Keep measuring and testing changes until you’ve identified an improved process/outcome
Data Governance Resources

- Data Governance:
  - https://www.smartsheet.com/data-governance - Data Governance Policy outline and template
  - https://www.pandadoc.com/data-security-policy-template/ - basic template for a data security policy
  - https://www.pandadoc.com/computer-use-policy-template/
  - https://www.pandadoc.com/company-policy-templates/
Stay Tuned-Join the AACE Email Digest!

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Or scan the QR Code!
Workshop Evaluation

Please be sure to complete the program evaluation!

Link to evaluation: https://forms.office.com/g/8vaKzstY22

Or scan the QR Code!
Thank you!

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