nten

2022 Data Empowerment Report

AN NTEN REPORT
by Robert Hulshof-Schmidt

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Introduction

Regardless of the sector or venue, I can't think of a nonprofit-related event in the past few years where data didn't come up. During the pandemic, organizations have in some ways found data to be even more important in their planning and decision-making than before. This includes new areas of evaluation that hadn't been part of programs before with a change to digital service delivery, and an even more critical need to track resources and community needs.

In 2020, we conducted the first Data Empowerment Survey and published the corresponding report. Two years later, with a number of shifting factors for the nonprofit sector in the U.S. and beyond, we were curious about what may have stayed the same or changed with data collection, management, and use. For both surveys, NTEN promoted it through our email list and social media ads. This year, Data.org also helped promote the survey through their network.

So, what did we find?

Funders and granting organizations continue to have an outsized influence on how and what data is collected. Most respondents say they customize their reporting for different funders. Despite efforts from inside and outside philanthropy over the past few years to call for changes to funders' level of influence and the burdensome requirements in applications and reporting, the responses to this year's survey match where we were a few years ago.

Another area where we see responses matching is in access to data and reports internally. Of course, if we want to have program and evaluation data that supports program and service delivery decisions, staff need access to that data and the ability to create reports. In 2020 and now again, we see three-quarters of respondents have 25% or fewer of their staff who are capable of running custom reports.

There were some areas of change, even if it was slight. Areas that were important to me to watch did see some slight changes.

Slightly more respondents reported that they never asked for consent to collect data or didn't know if they did. As we engage in conversations at organizations about the data we may collect, manage, or use, it is critical to remember that little of that data is actually ours but belongs to the community, donors, and program participants. Consent to collect it and the ability to revoke that consent at any time is a critical piece of any data or privacy policy.

Lastly, in a more positive light, the top two challenges related to adopting technology that supports data use this year were connected to staff capacity and skills. In 2020, funding was the second highest response, with survey participants indicating that organizational financial capacity was a key challenge to adopting technology. This year, while still a strong number of responses, financial capacity fell to third place. Building staff confidence and skills does not have to take a lot of budget, so the responses this year give me some hope that organizations can make improvements and know that they can.

We know that NTEN isn't the only organization looking at how data practices and policies may be or may not be supporting nonprofit missions. Chris Bopp, PhD is an Assistant Professor of Computer Science at St. Bonaventure University. Over the past eight years, Chris has conducted in-depth qualitative research with over 100 nonprofit stakeholders to understand the challenges they encounter in attempts to make nonprofits more data driven. What did Chris think of this year's survey findings?

> *"Organizations represented in this study reported data sets that are not only large, but also fragmented as data comes in from many different sources (such as staff data entry, websites, and paper) and ends up in many different analytics platforms (such as spreadsheets and databases). While some respondents reported synchronized processes to bring data across systems, this was not commonly mentioned. These findings are consistent with other research that indicates staff are spending a large amount of time on data entry and management to make sense of data that is fragmented across information systems.*
>
> *"While synchronization processes are commonly used to address fragmentation and duplicate data entry tasks in organizations that have data warehouses (central databases for collecting all data across an entire organization), we do not see those implemented in organizations that responded to this survey. Other research has indicated that staff are spending so much time collecting and analyzing the data for funding and accountability purposes that there isn't enough time left at the end of the day to take the necessary proactive steps to implement such data synchronization activities.*
>
> *"This survey's results regarding data collection factors indicates that the major factors influencing data gathering decisions were improving program outcomes and funder reporting. This is both promising and concerning. It is promising that program outcomes were rated so highly — especially when the survey results regarding use of data also indicate that the most common use of data was for internal reporting and evaluation. However, it's unclear as to what extent such data is proving to be actually useful. While the data may be used, it's unclear to what extent it is able to address the organization's questions. Other research has indicated that while such data can be used, it still falls short of being able to (at least in certain human services domains) be useful for answering the difficult and complicated questions that organizations have about their impact on constituents. These concerns were raised by staff who explained that because funders had so much influence over what data gets collected and in what format, that it renders the data less useful for answering the questions that are deemed important within the organization. This survey seems to support this conclusion in that most respondents reported challenges with data value.*
>
> *"Additionally, few organizations in this survey reported being influenced by external organizations or partners when it comes to informing the data that is collected. This is troubling given the longitudinal and community-centric*

nature of nonprofit work. Such initiatives as collective impact are difficult to imagine when partner organizations are not part of the conversation in determining what data should be collected.

"While another challenge respondents report is having staff in-house who can implement technologies, volunteers are infrequently relied upon for data work. Other research has indicated that such tasks are too involved, sensitive, or specialized to rely on volunteers. The orientation towards accountability to funders and other stakeholders takes up so much staff time that there is no capacity for additional work — such as data literacy training, strategic data planning, or tool acquisition — to be done in-house, and volunteers are not an option. Consistent with other research, additional funding is needed to build capacity for data management and analysis in-house."

Topics like these can be overwhelming as you start to think through areas of change in your organization. You are never alone in this work though! NTEN's online groups are a great community resources, where you can ask questions, share your experience, and work through challenges big and small. Check out the groups focused on data, tech decision-makers, and general discussion to talk more about this report and your biggest technology questions.

Amy Sample Ward
CEO, NTEN

ABOUT NTEN

We are creating a world where missions and movements are successful through the skillful and equitable use of technology.

We build transformative power by connecting people who are putting technology to work for social change. We strengthen their individual and collective capacity for doing good by offering expert trainings, researching effective approaches, and providing places where relationships can flourish. We relentlessly advocate for the redesign of the systems and structures that maintain inequity.

NTEN reports support the growth and development of the sector through benchmarking the technology goals and challenges of nonprofits, and by identifying areas of need.

For more, visit **nten.org/publications**

Records

Nonprofits collect data for many reasons, including to improve their programs and services, measure their impact, and obtain funding. The volume and variety of these records can feel overwhelming, but it doesn't have to be. Staying focused on what data matters most to your mission will help you manage records effectively.

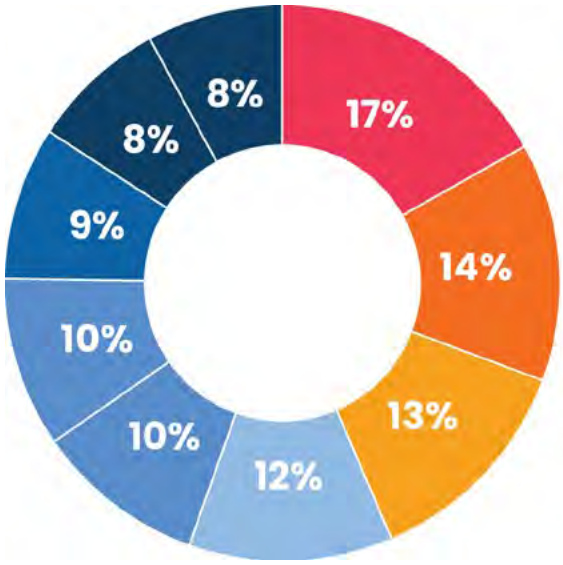
FIGURE 1

Roughly how many constituent records does your organization manage?

Respondents reported a wide range of record volume. Every category was selected by at least 8% of respondents. The largest group is 2,501 to 10,000, accounting for about one-sixth of respondents.

In general, the size of the record set corresponds to the age of the organization, with a somewhat weaker connection to organization staff size. Larger and longer-established nonprofits understandably have more records. Smaller organizations may still have many constituents. There is no strong correlation between record size and mission area.

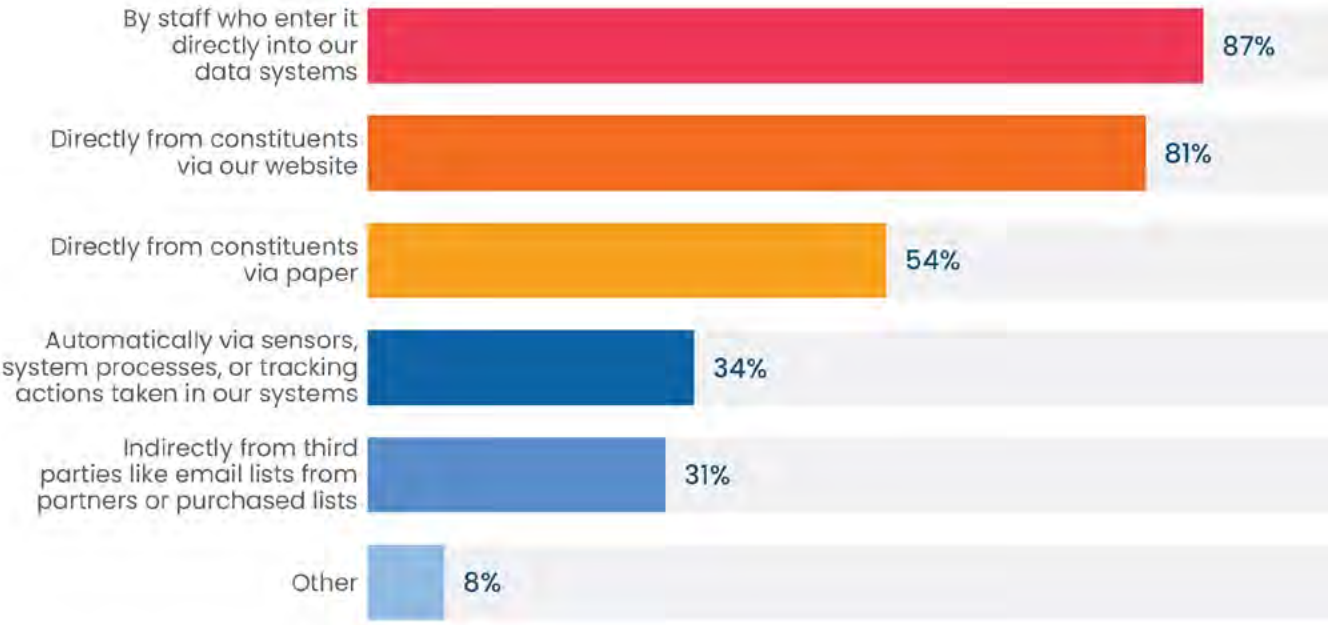
Records come from a variety of places, with most respondents indicating at least two data sources. A significant number rely on some sort of manual process.



Response	%
Fewer than 500	9%
501 to 1,000	8%
1,000 to 2,500	8%
2,501 to 10,000	17%
10,001 to 25,000	14%
25,001 to 50,000	10%
50,001 to 100,000	10%
100,001 to 500,000	12%
More than 500,000	13%

FIGURE 2

How does your organization collect data?



Respondents who indicated "other" had two primary categories:

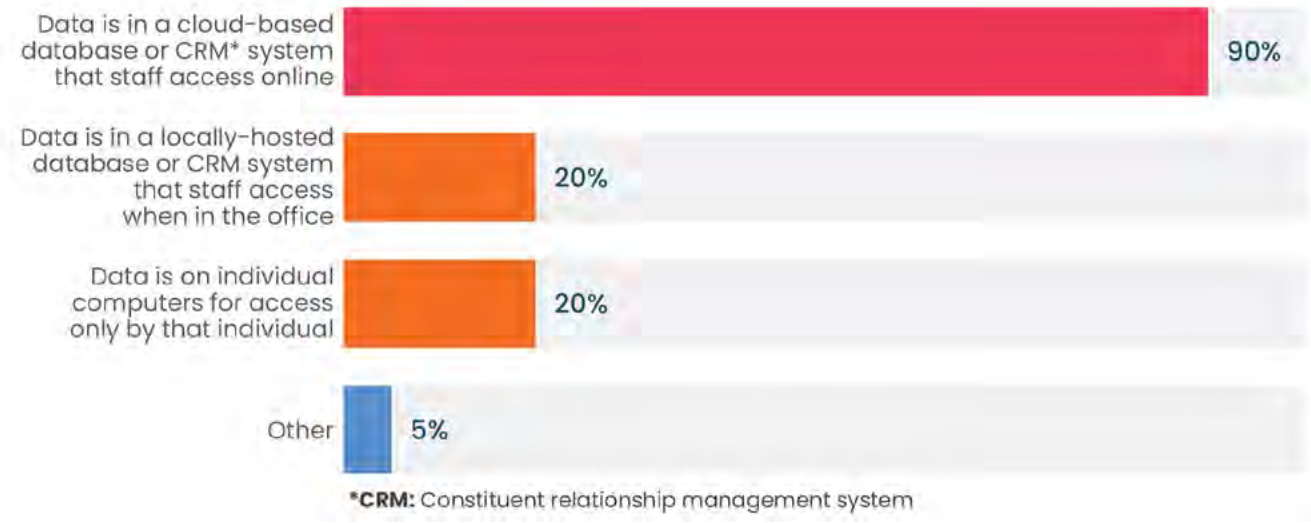
- From constituents via some process not identified in the survey questions.
- Synchronized processes from some other system, often a donation or subscription system.

Storage

There's no one-size-fits-all data storage solution for nonprofits. Different departments within the same organization are even likely to have different preferences when it comes to choosing between basic spreadsheets, specialized software, or a customized system. No matter the storage solution, most organizations have moved their data access to the cloud.

FIGURE 3

How is your data accessed?



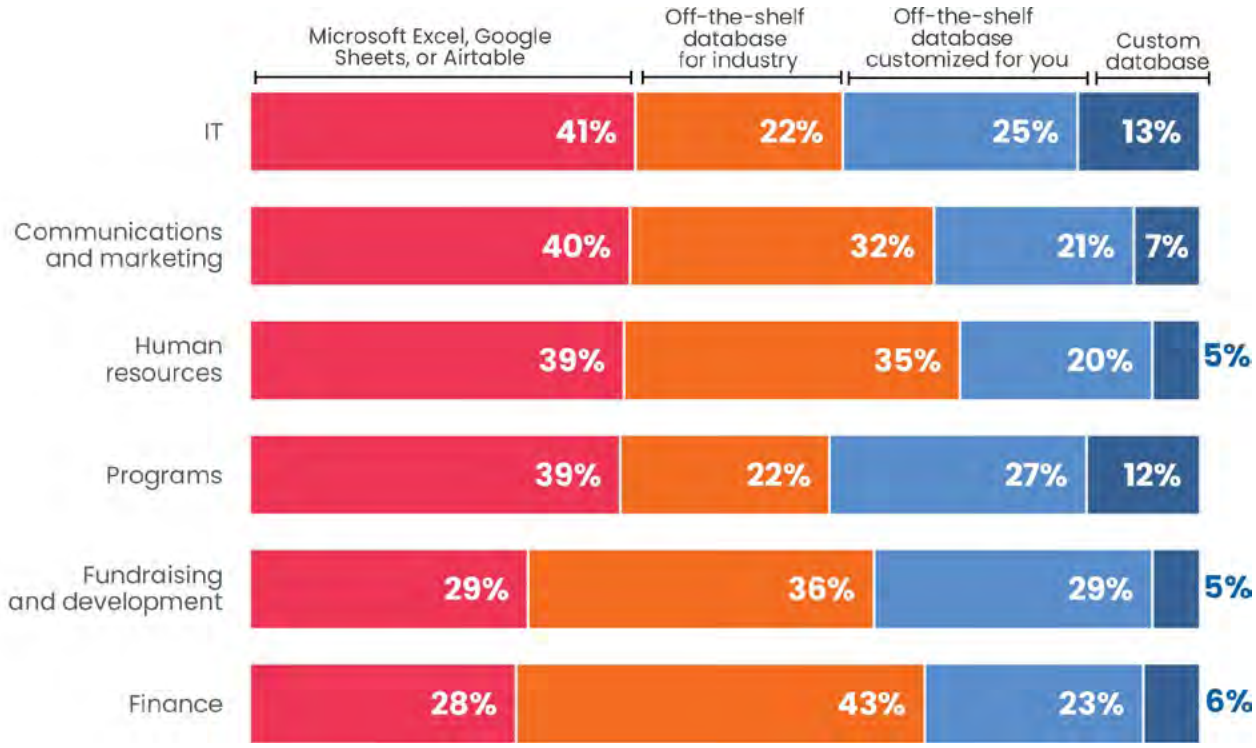
The vast majority of respondents make their data available to staff through a database with online access. This is true across the data storage types, even when data is stored in spreadsheet form.

The majority of respondents who indicated "access only by that individual" were referring to human resources or IT data.

Most of the "other" responses indicated cloud-based tools of some sort.

FIGURE 4

What is the primary type of data storage system used for each of these departments?



While there is a wide variance in the popularity of data storage systems based on the type of records contained, four of the six departments rank the systems in roughly the same order:

- Spreadsheets.
- Off-the-shelf databases.
- Custom databases.

Communications and marketing as well as human resources have a slight preference for completely standard tools, whereas programs and IT use customized commercial tools. Both finance and fundraising rank standard off-the-shelf tools even above spreadsheets.

These categories line up in order from the simplest and least expensive to the most complex and resource intensive, so the order is not surprising.

Financial and fundraising data storage has slightly larger adoption of off-the-shelf tools. Both of these areas have a long history of strong tools and a need for built-in security, so these variations are not a surprise.

Collection

Nonprofits collect a wide variety of data for various needs. At many nonprofits, funders have a large influence on what data gets collected, particularly when it comes to demographic data. But, collecting constituent demographics is important for more than just satisfying funders — it helps nonprofits know whether programs are reaching and engaging the people it's their mission to serve.

FIGURE 5

How have the following factors influenced the data you collect?

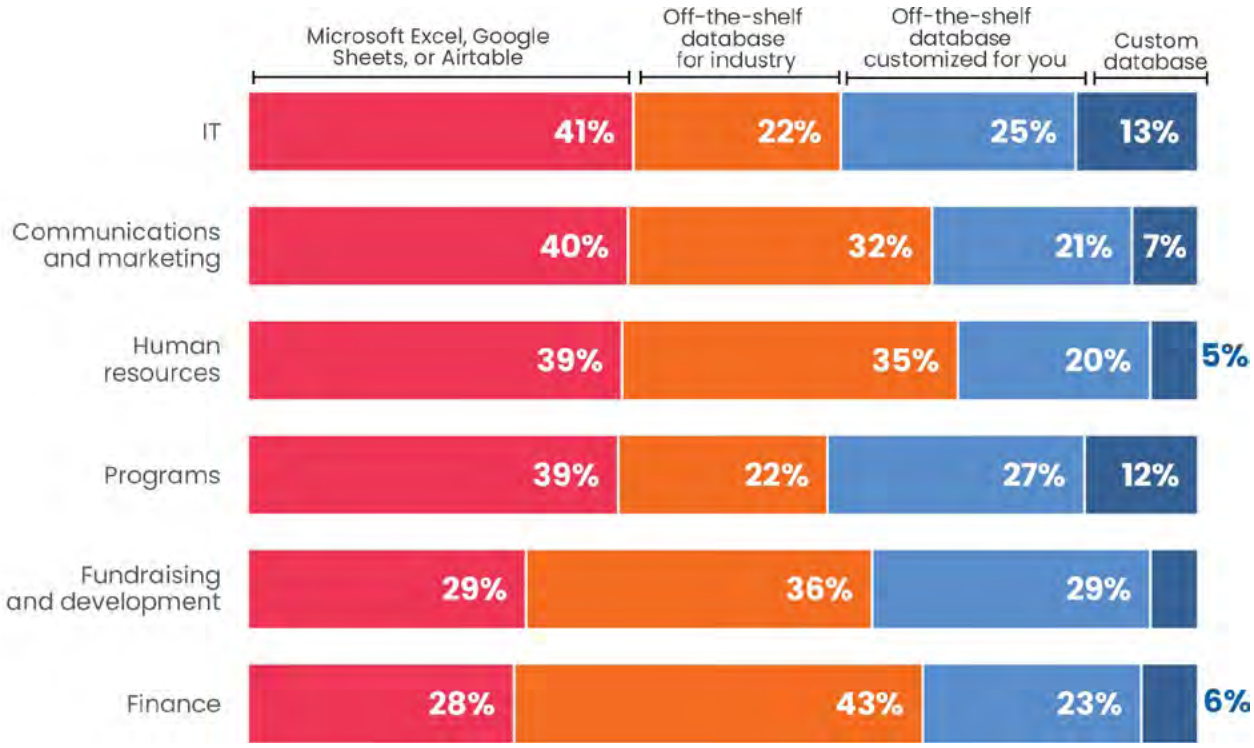
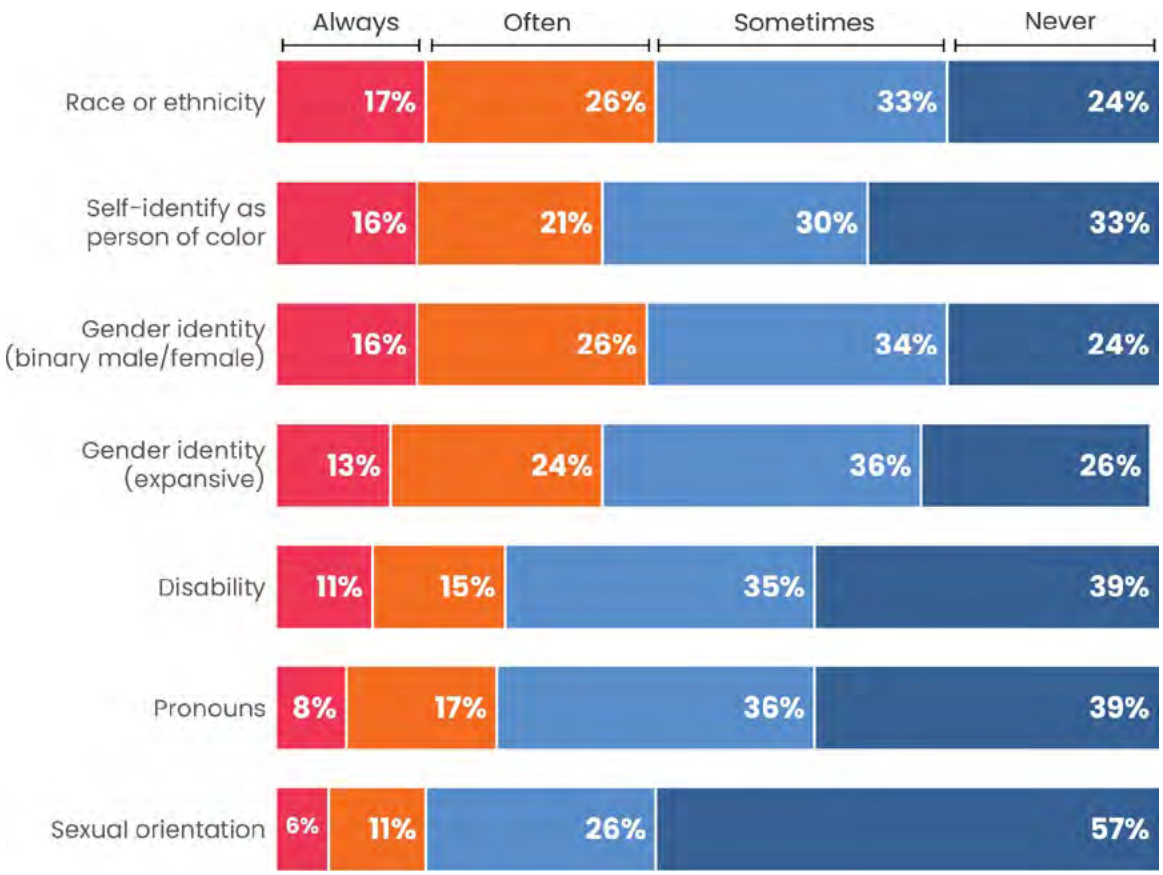


FIGURE 6

Do you collect any of the following types of data?



Respondents indicated a wide range of factors that influenced their data gathering decisions. The most significant factors were requirements from funding sources and program outcome improvements. This is not surprising: meeting funder expectations is often tied to continued funding, and program improvements have a clear impact on services. The least influential areas were donor interest as well as input from external organizations and partners. While it's not specified in the data, it seems likely that there are less clear and consistent sources of information from these influencers.

A significant number of respondents do not collect any fundamental demographic data about their constituents. The most notable exception was race and ethnicity data, which is frequently requested by funders and grantmakers. In general, if an organization "always" collects some demographic information, they are much more likely to collect other categories "always" or "often."

There is not a strong correlation between the respondents' mission areas and the kinds of data they collect. However, five areas are more likely to indicate "always" and "often" collection activities. These are: civil rights or advocacy, education, employment, human services, and youth.

Demographics are often a part of the work of civil rights and advocacy organizations, so this connection makes sense. The other categories seem more likely to have legal or funding obligations related to the categories of people they serve.

Consent

Consent is all about making sure that people are explicitly aware of what data is being collected and how it will be used. Giving people the choice to opt out of having their data collected and used is a best practice many nonprofits have yet to embrace. Improving consent around data is an area of opportunity to increase trust between nonprofits and the people they serve.

FIGURE 7

What systems does your organization use for gaining consent to collect and use data?

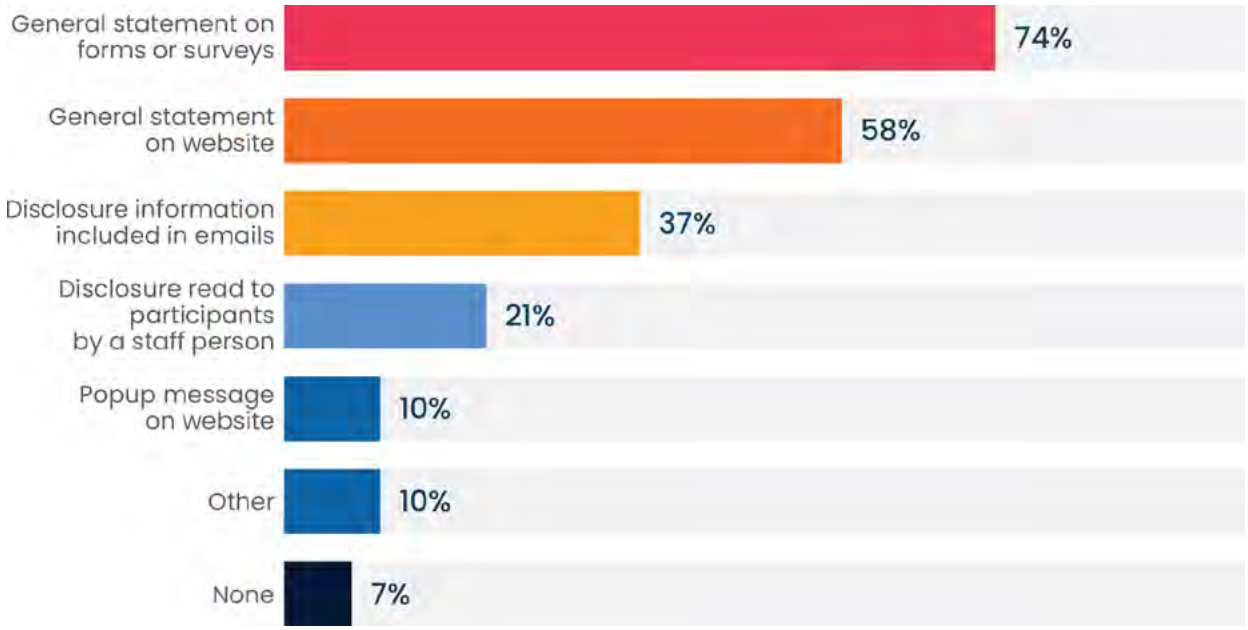
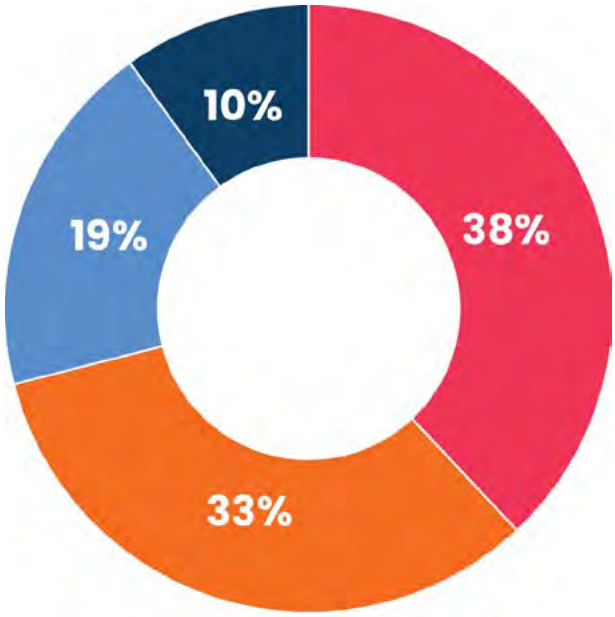


FIGURE 8

Does your organization allow constituents to opt out of having their data stored or used by your organization?

The majority of respondents rely on general statements to obtain consent from individuals and organizations before sharing their data, mostly on specific data gathering tools, but also with a standard website disclaimer. Those who indicated "other" fit into two broad categories: application-specific disclosures and disclaimers in contracts.

About two-thirds of respondents allow some measure of opting out of data collection by constituents. There seems to be some connection between the purpose of the data and the level of opting out allowed. For example, respondents who indicated data collection for grant reporting seldom said "always" for allowing constituents to opt out.



Response	%
Always	33%
In some circumstances	38%
Never	10%
I don't know	19%

Use of data

Data can be used in so many ways. Internally, data can help nonprofits make plans, track progress, and identify areas for improvement. Externally, data can be shared with funders, sponsors, and the community to show the nonprofit's impact. Nonprofits can squeeze more value out of data by looking for more ways to repurpose what they already have.

FIGURE 9

In which of the following ways do you or your organization use data generally?

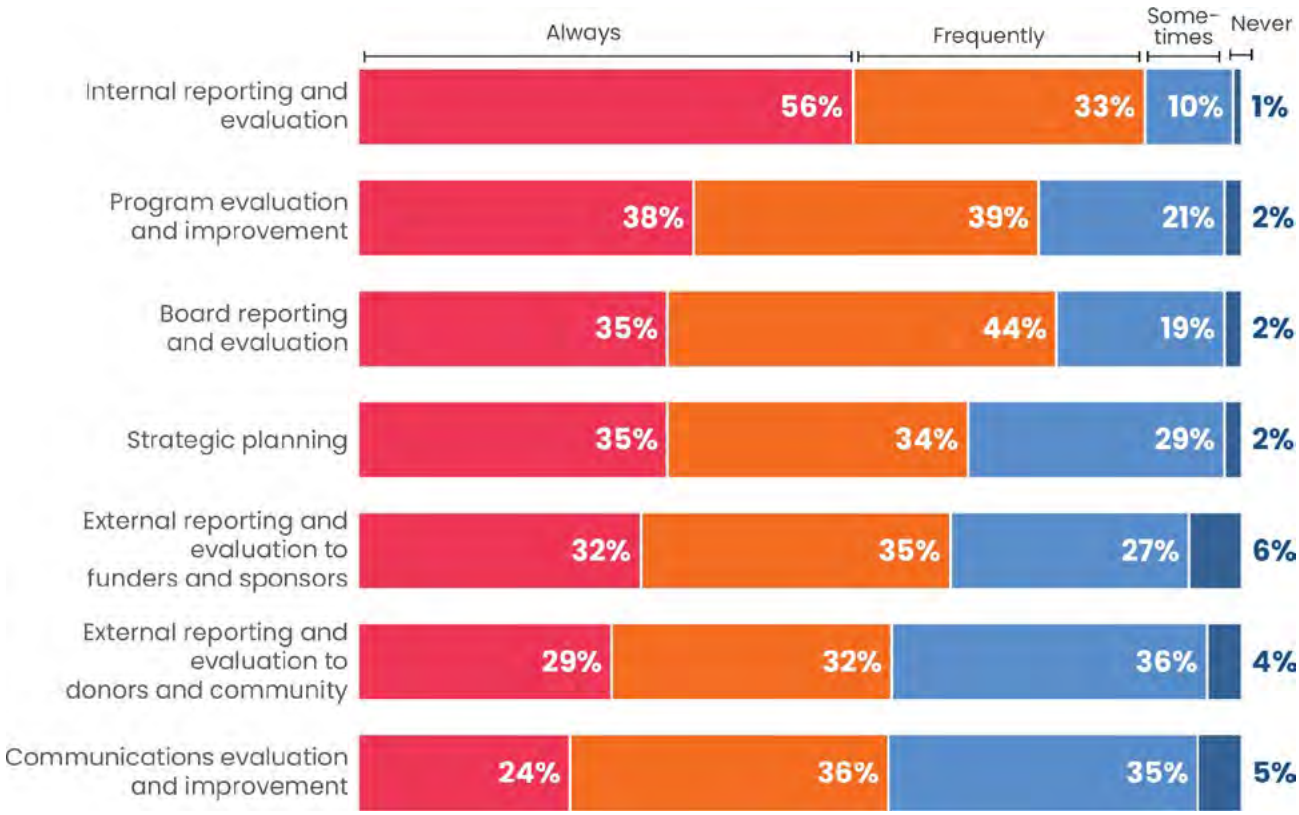
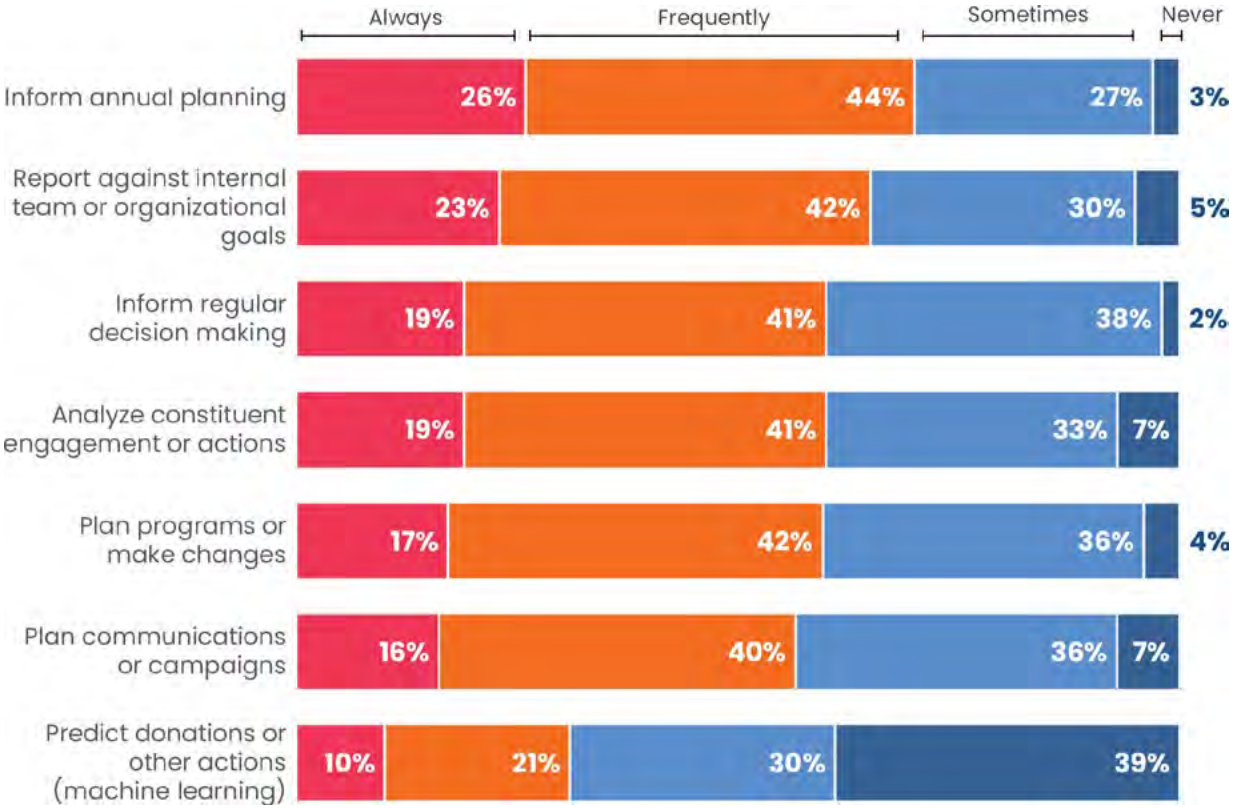


FIGURE 10

In which of the following ways do you or your organization use data strategically?



Data that is used directly to impact staff activity is collected with much greater frequency than externally used data. The only general use of data that is ranked "always" more than 50% of the time is internal reporting and evaluation. Program evaluation, board communication, and strategic planning are the other significant areas of general use.

Over 60% of respondents "always" or "frequently" use data for almost all purposes, with annual planning and goal setting showing the most regular use. This aligns both with the value of data for strategic planning and for program improvement.

Many respondents indicated that they "frequently" share data with funders and donors, implying that certain kinds of data are shared with those audiences. This may be driven by reporting requirements from funders. The ways that data is shared align well with the ways that data is used. Data is shared with relevant staff and the board, and in specific reports with high frequency.

FIGURE 11

In which of the following ways do you share data?

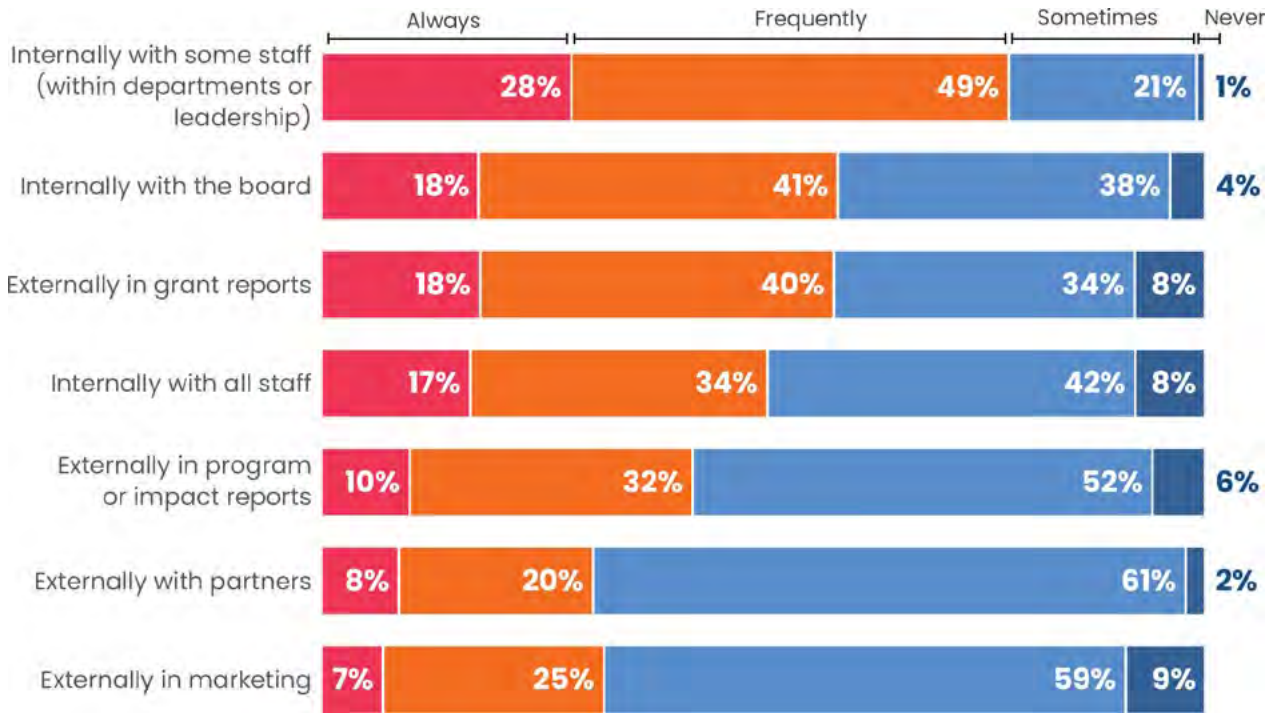
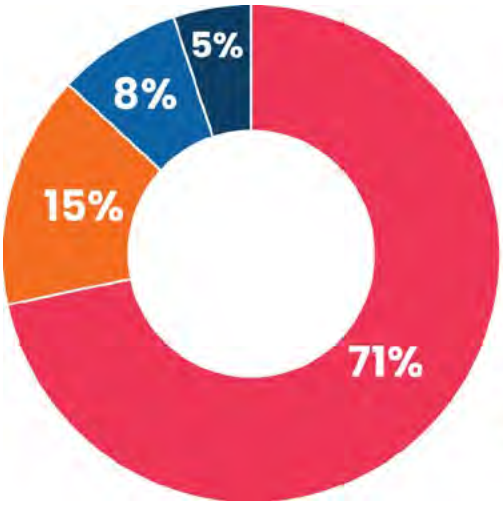


FIGURE 12

If you provide data for grant reports, which of the following options most closely align with your process?



Response	%
We provide **custom reports** of our program or other organization data to match the funder's unique reporting requirements	71%
We provide **standardized reports** of our program or other organization data so that all of our reporting is the same	8%
I don't know	15%
Other	5%

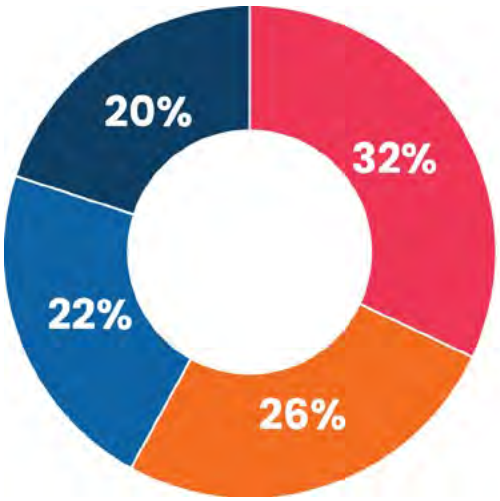
The vast majority of respondents (71%) customize their data reporting to meet the needs of granting bodies. This corresponds with the significant variation in granting body expectations, needs, and requirements.

Standards

Data standards and policies can help nonprofits protect personal information and maintain trust with their communities. Despite these obligations, nonprofit staff may not know which standards they need to follow. More nonprofits should learn these data standards and policies so they can ensure that data is collected and shared responsibly and ethically, and in line with their mission and values.

FIGURE 13

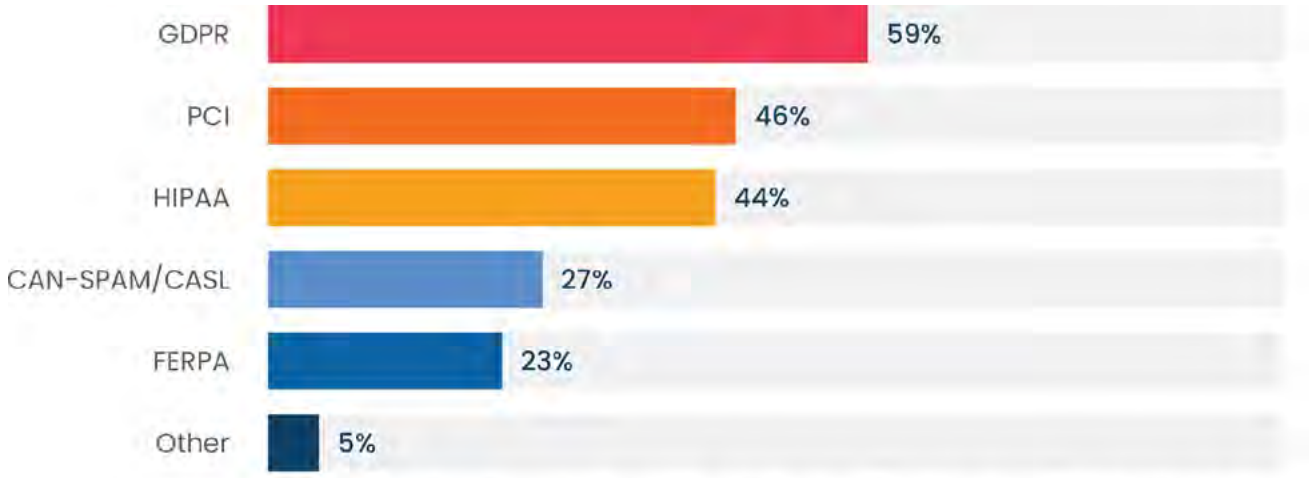
If you collect data on race, ethnicity, gender identity, sexual orientation, or disability, do you use this data to make decisions about service or program delivery?



Response	%
Yes, we talk about this publicly	32%
Yes, but we don't talk about this publicly	22%
No	26%
We don't collect this data	20%

FIGURE 14

Which of the following data standards are policies do you monitor?



GDPR: General Data Protection Regulation; **PCI:** Payment Card Industry; **HIPAA:** Health Insurance Portability and Accountability Act; **CAN-SPAM/CASL:** Controlling the Assault of Non-Solicited Pornography and Marketing Act/Canada's Anti-Spam Legislation; **FERPA:** Family Educational Rights and Privacy Act.

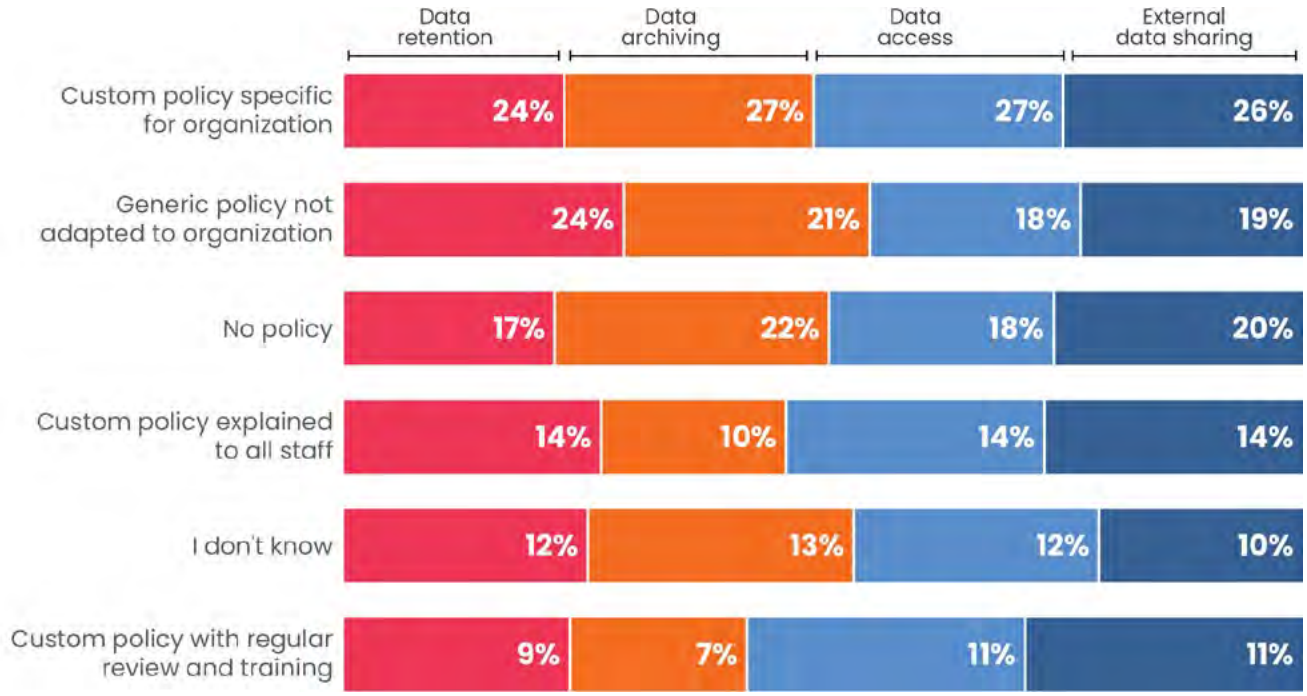
About 20% of survey respondents do not collect personal demographic information. A quarter do not use this data to drive decision-making. The 54% who do use the information for decisions about service and program delivery are somewhat more likely to share that fact than not to.

Monitoring of standards has increased significantly since the last survey, when less than one-third of respondents indicated any monitoring. GDPR has grown to nearly 60%, while PCI and HIPAA are both over 40%.

The 14% who indicated "other" mostly specified some industry-specific standards. Not surprisingly, monitoring of the listed standards also aligned closely with the organization's main line of business. The 46% that indicated monitoring PCI compliance were mostly larger organizations that used more custom systems for their financial and donation data. It seems likely that other organizations rely on third-party tools to handle this requirement.

FIGURE 15

What policies related to data does your organization have in place?



Only about two-thirds of respondents indicated that they had or knew about data policies. Given that survey respondents have some responsibility for organizational data, being unaware of a policy is equivalent to having no policy at all. Data access and retention had the highest rate of policy presence. When a policy exists, it is most likely to be custom for the organization but not fully distributed. Generic policies were the second most common. There is some correlation between organization size and age and the level of customization, but none by mission area.

Staff and data

The responsibility for data collection and management in nonprofits winds up with people in various roles. Whether it's staff, board, consultants, or volunteers who shoulder the responsibility, they should be fully informed about their obligations. Securing consent, keeping data up to date, and protecting sensitive personal information are key to maintaining trust in the nonprofit's work.

FIGURE 16

Who in your organization is responsible for ensuring the organization is compliant with relevant laws or data policies?

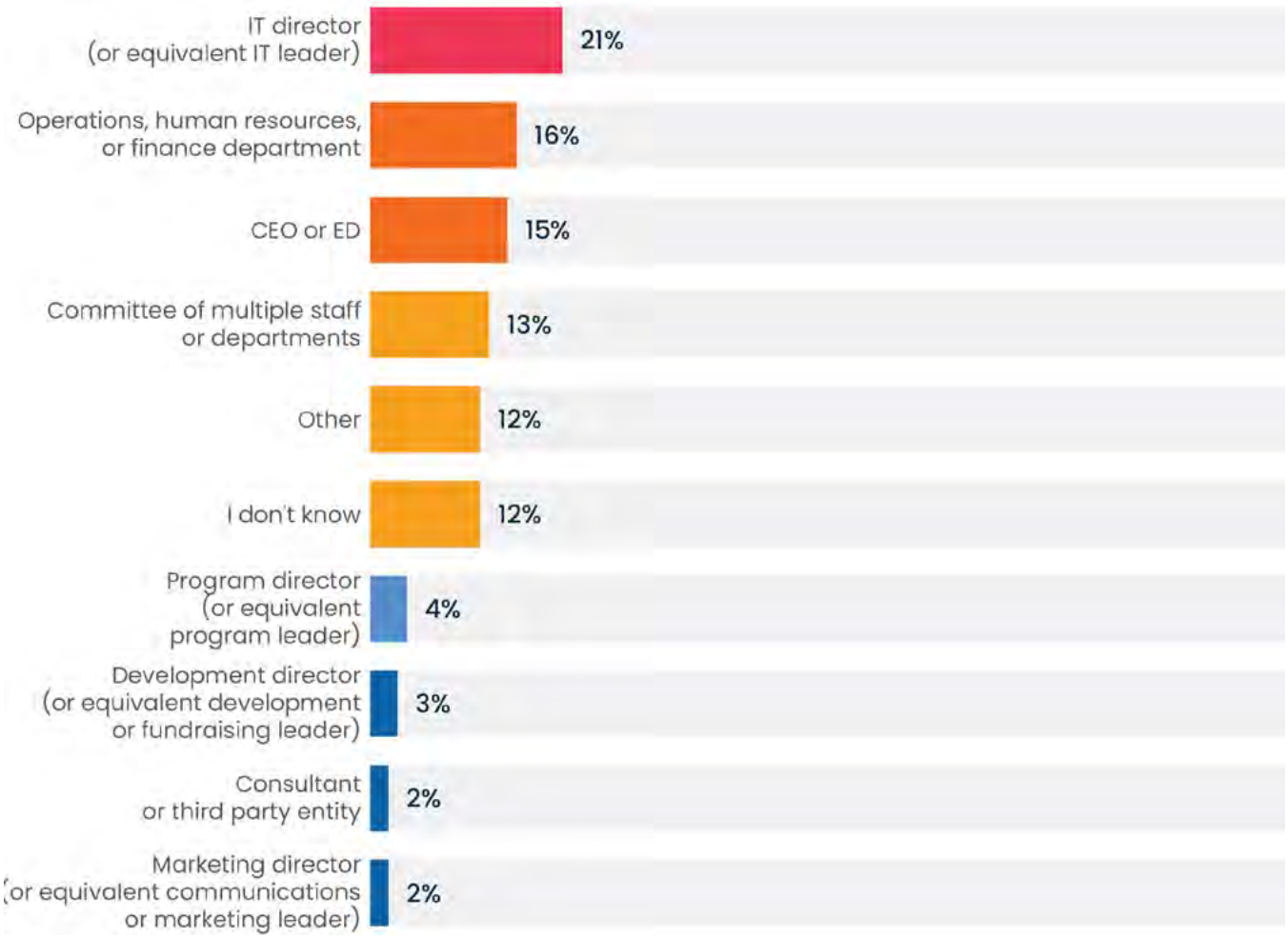
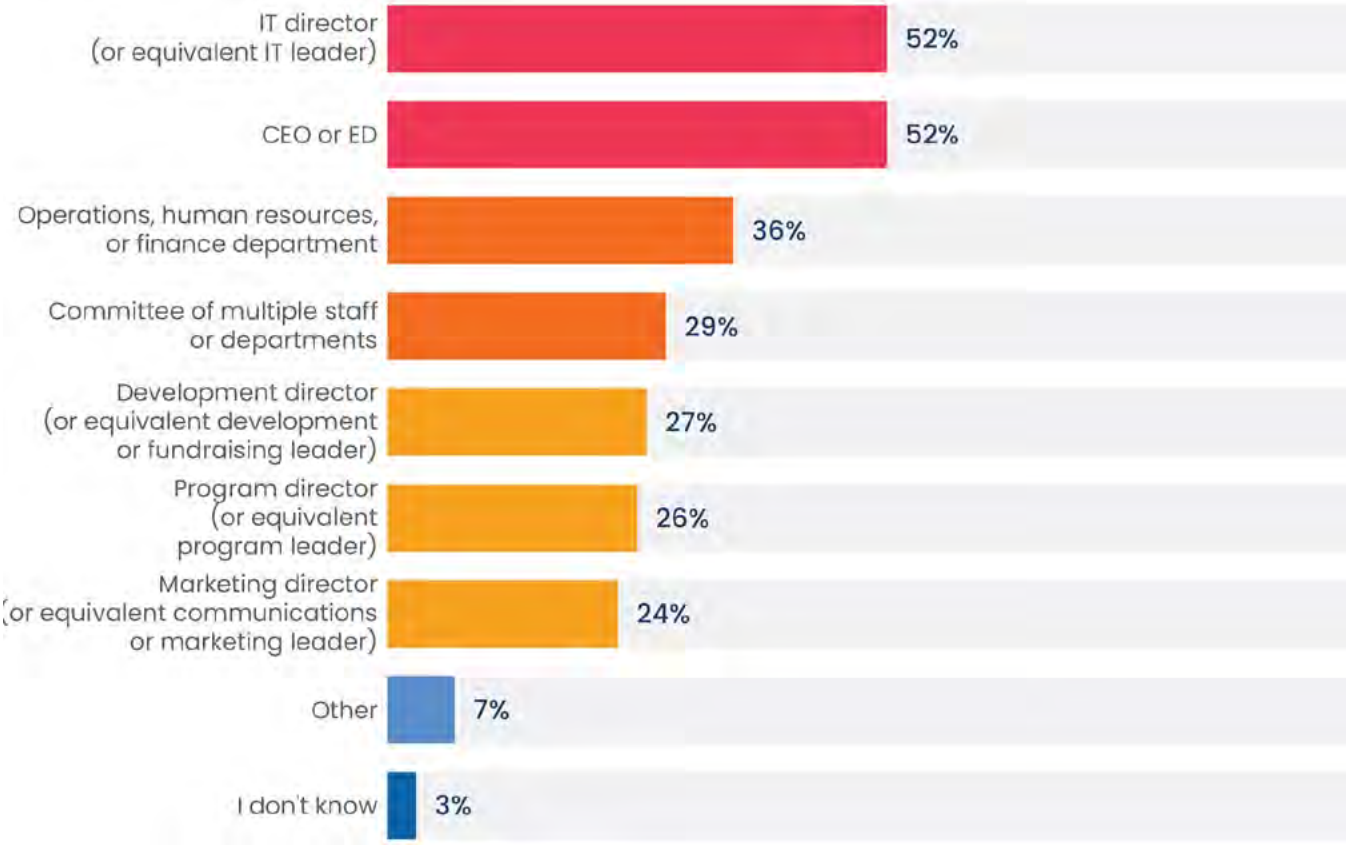


FIGURE 17

Who has authority for adopting new technologies that could have impacts on data collection or use?



Compliance authority tends to lie with organizational leadership. The most common responsible parties are the CEO or ED, heads of IT, and heads of operations, human resources, or finance. Given the significance and potential business implications of compliance, this makes sense. Respondents who indicated "other" fit into two broad categories: first, those noting a specific compliance officer or equivalent (especially larger organizations), and then the bulk of the others indicated hybrid responsibility.

Authority for the adoption of new technologies is similar, but not as stark. Responsibility often goes to the person or area that will be implementing and monitoring the technology, usually in concert with one of the three top-level decision-makers. Those who indicated "other" frequently have a committee or department dedicated to the review and adoption of technology.

FIGURE 18

Provide the full-time equivalent (FTE) amount for the following responsibilities fulfilled by a staff person inside your organization.

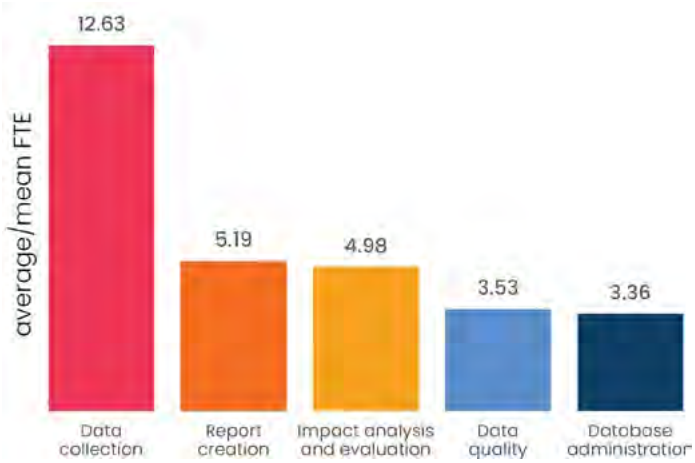


FIGURE 19

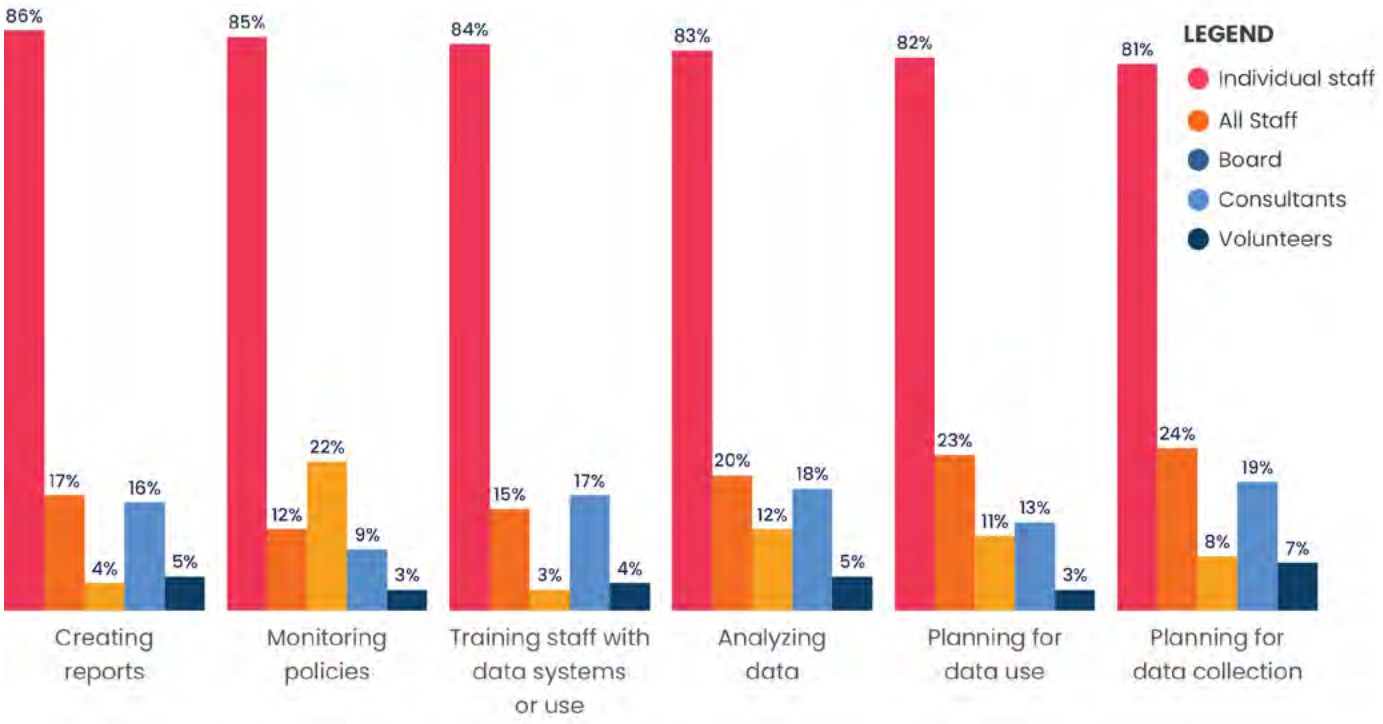
Provide the full-time equivalent amount (FTE) fulfilled by a consultant or third-party entity responsible for your organization's technology and/or data.

Other than data collection, the staff responsible for data activities fit in a narrow window of between three and five. While larger organizations naturally had more staffing for most activities, the scale was not direct.

The one exception was data collection. This labor-intensive activity saw a significant increase in human resources in organizations with larger staffs. Not surprisingly it was also the area where third-party assistance was most common.

FIGURE 20

Who participates in the following activities at your organization?



Approximately 80% of respondents indicated that specific staff had responsibility for each of the data activities identified in the survey. This makes sense, as specific data responsibility can easily be tied to individual position descriptions or department functions.

The fewer staff the organization has, the more likely they were to say "all staff," indicating a collaborative approach and the need to share duties when there are fewer individuals. Volunteers were also used more by smaller organizations, although with less strong correlation.

Challenges

Just about every nonprofit faces challenges in collecting and using data. Nonprofits may face limited resources, lack data expertise, and have tech tools that don't meet their needs. However, by addressing these challenges, nonprofits can put data to work for their missions and communities. The solutions aren't limited to staff training and investments in data technology, but those are a great place to start.

FIGURE 21

Which of the following are challenges for you and your organization in data collection?

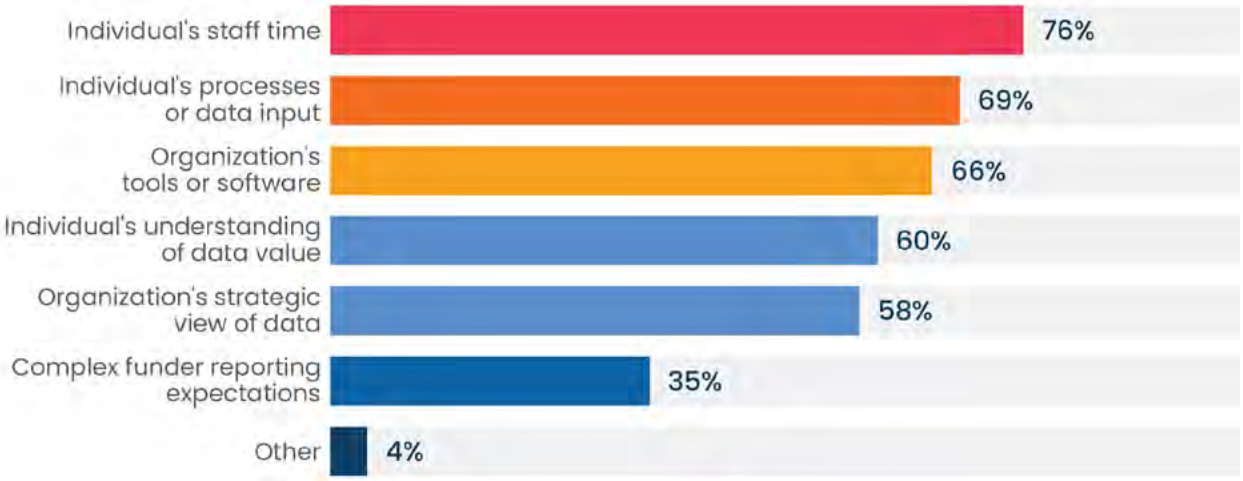
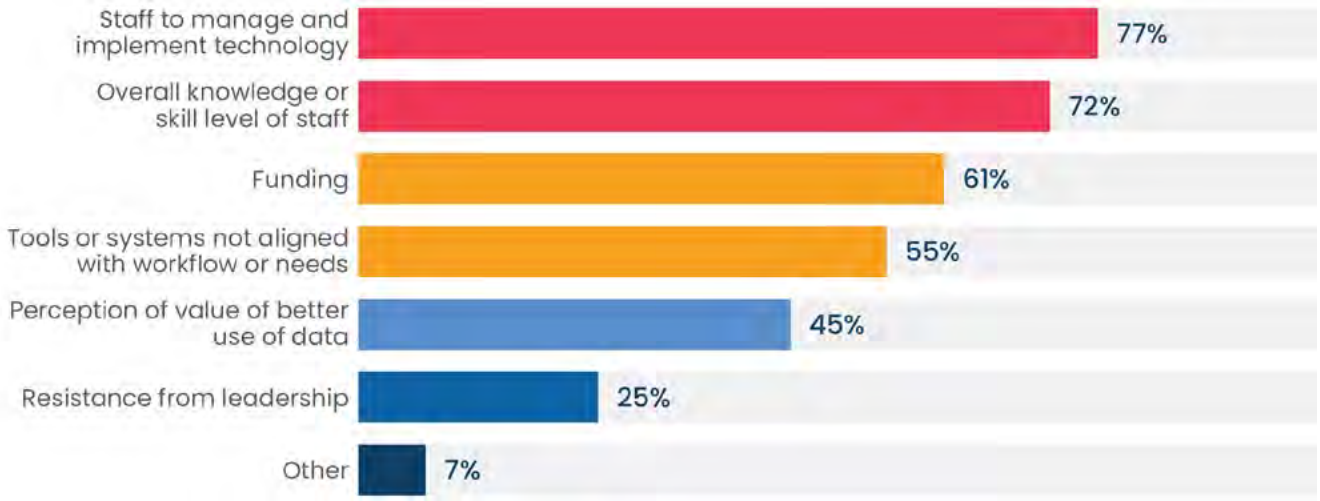


FIGURE 22

Which of the following are challenges for you and your organization to successfully adopt technology that supports successful data use?



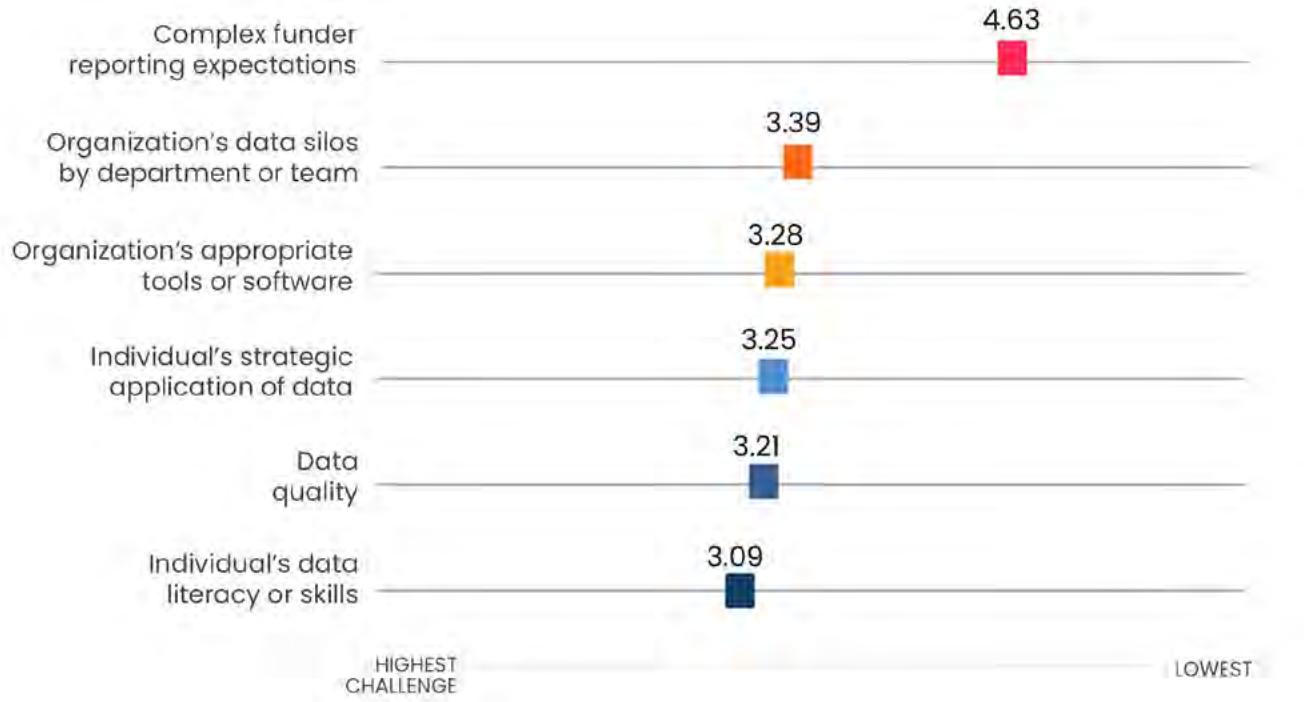
Over 60% of respondents indicated that they experience most of the data collection challenges identified in the survey. Data complexity was the least significant, while the trio of challenges related to individual knowledge, skills, and abilities was the biggest.

Those who indicated "other" had a wide variety of challenges, with data consistency and quality being the most common.

Technology adoption responses were somewhat more varied, although individual staff characteristics were the largest again. Both categories over 70% relate to staff knowledge and skills, indicating a strong need for nonprofits to focus on recruitment, retention, and training of staff with strong data and technology skills. There is no real variation in the kinds of challenges faced by respondents based on organizational staff levels, budget, or service area.

FIGURE 23

Rank the following challenges in data use in order of impact for your organization. 1 is the highest challenge and 6 is the lowest challenge.



Aligning nicely with the previous questions, complex funder expectations was by far the lowest challenge identified by respondents. The other five challenges clustered fairly tightly around 3, but did rank clearly:

- Individual's data literacy or skills.
- Data quality.
- Individual's strategic application of data.
- Organization's appropriate tools or software.
- Organization's data silos by department or team.

The importance of the individual plays out clearly in this view of understanding challenges as it did in the other questions.

It is interesting to note that the responses to questions about challenges map very similarly to the 2020 survey. However, the perceived amount of challenge is much higher, in the 60% range instead of the 40% range.

Resources

As they contemplate their data needs, plans, and priorities, nonprofits need to draw on a variety of staffing and investment strategies. Taken together, these strategies can become part of a data-driven culture that can help nonprofits make informed decisions. As with so many things at nonprofits, having adequate funding is the most valuable resource for making data projects realistically attainable.

FIGURE 24

In the coming three to 12 months, which of the following investments or projects do you or your organization plan to undertake?

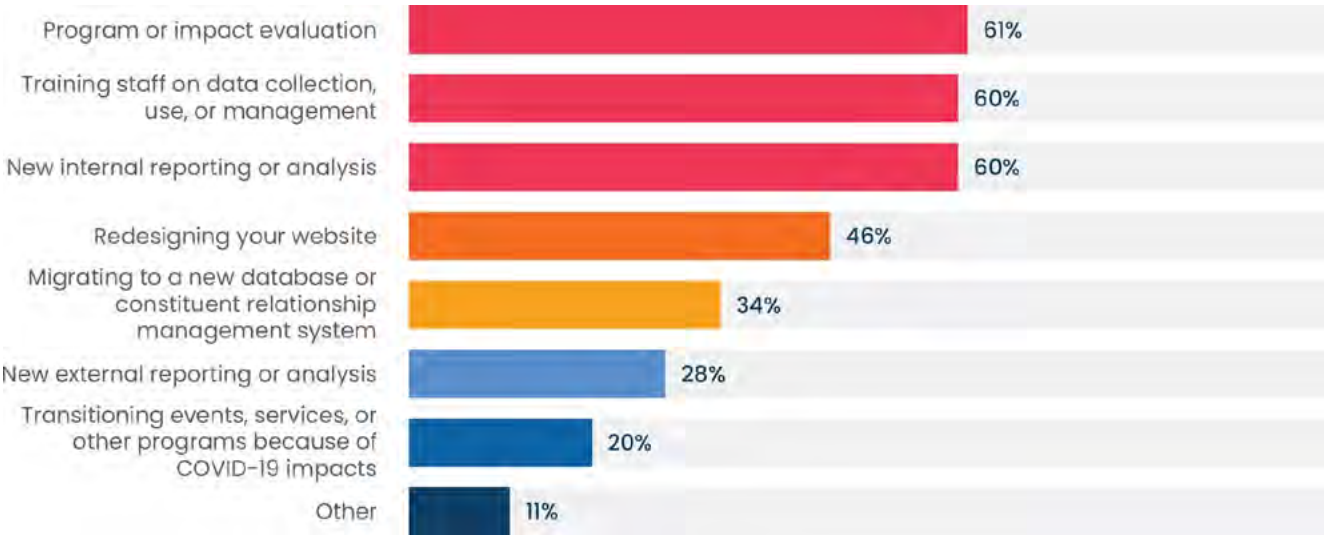
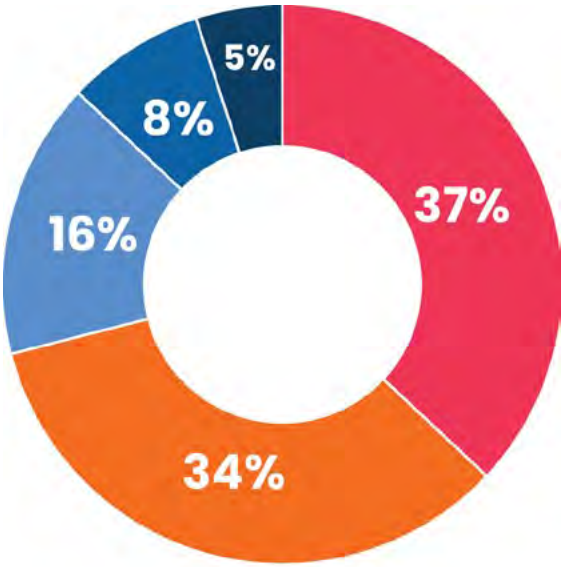


FIGURE 25

What is the percentage of staff at your organization with the skills and access to create and run customized reports from your data?



Response	%
0 to 10%	37%
11% to 25%	34%
25% to 50%	16%
50% to 75%	8%
75% to 100%	5%

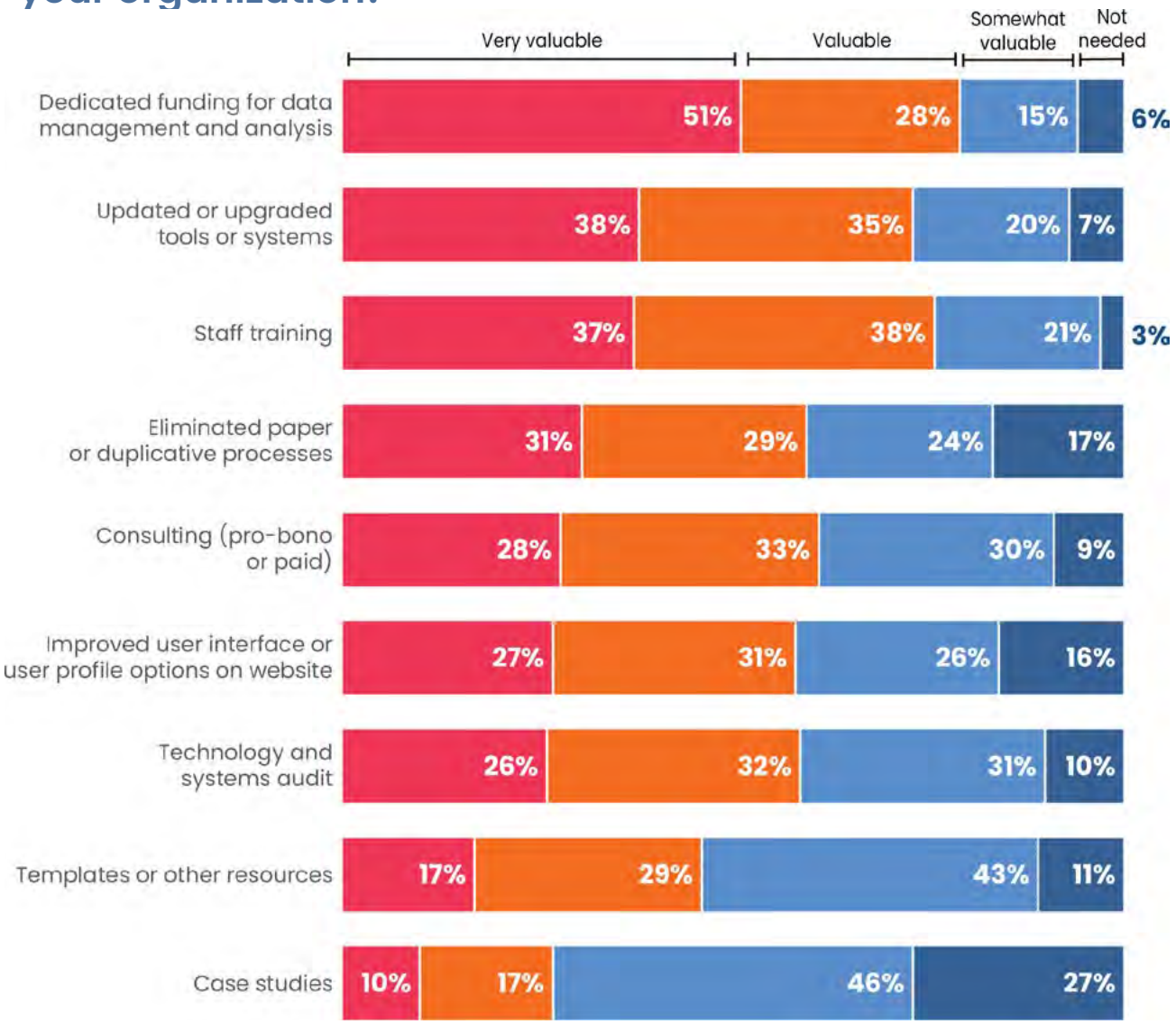
Most respondents have two or three activities that they plan to undertake within the next year. Only 20% indicated plans related to the COVID–19 pandemic, down from 75% in 2020, which is not at all surprising.

Evaluation and training, both of which are regular, ongoing activities at most organizations, are the most frequent, matched closely by new internal reporting or analysis plans.

Reflecting the importance of the individual in the organization, nearly three-quarters of respondents have 25% or fewer staff capable of running custom reports. These responses were inversely proportional to the size of the organization. Smaller respondents had more staff who could do more things.

FIGURE 26

Which of the following resources would be most valuable to your organization?



Not surprisingly, funding was seen as the most valuable resource for data management, selected as "valuable" or "very valuable" by nearly 80% of respondents. Contrary to conventional wisdom, the need for funding transcends organizational budgets, with respondents in all budget categories selecting "valuable" and "very valuable" consistently. Better systems, less redundancy, and better training were the other significantly valuable resources.

Analysis

Nonprofits take a variety of approaches to their data analysis and presentation. But there are many nonprofits who have yet to tap into some of the most compelling formats for presenting data internally and externally. By learning more ways to tailor data analysis and presentation to specific contexts and audiences, nonprofits can more effectively communicate their impact and engage people in their mission.

FIGURE 27

In what formats do your staff present data internally or externally?

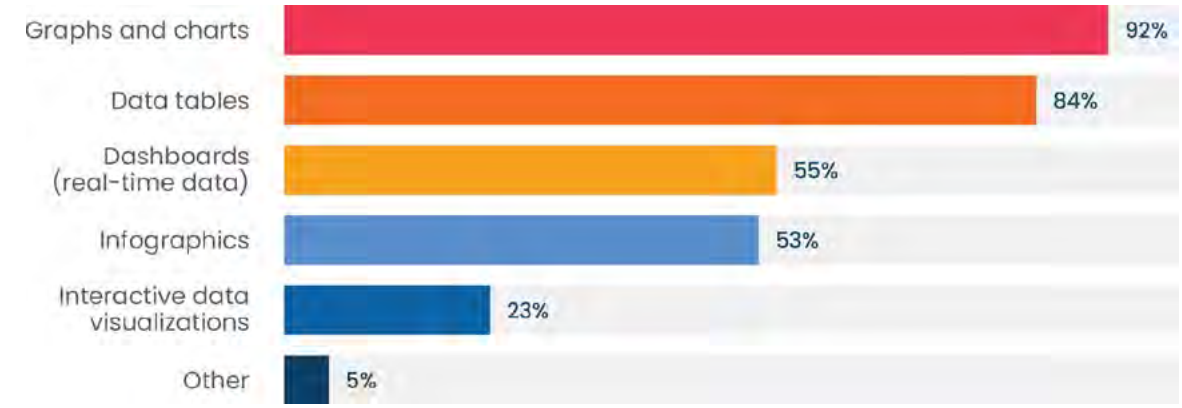
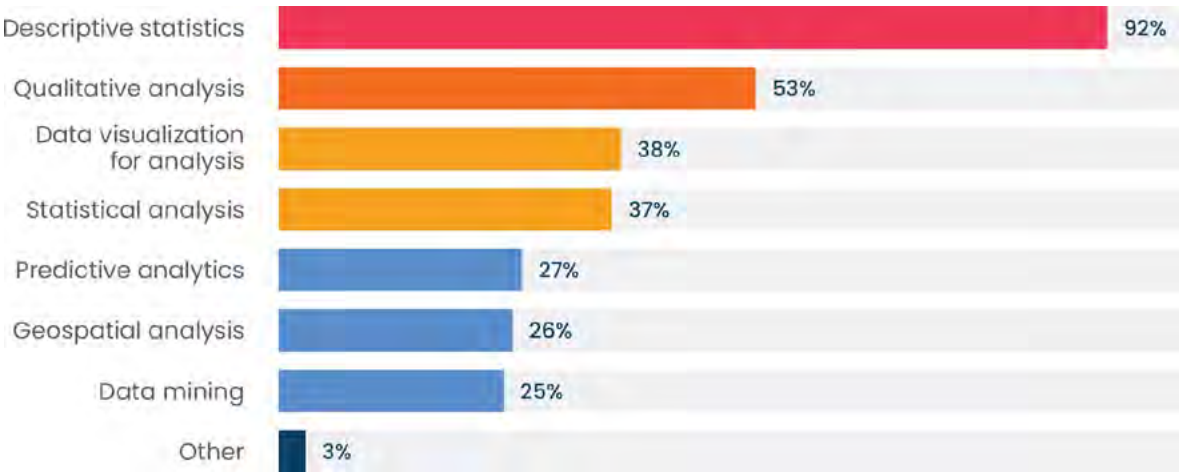


FIGURE 28

What is included in your organization's data analysis?



Over 80% of respondents use tables, graphs, and charts to present data. These are relatively simple and clear models that are available in the tools most respondents use (especially spreadsheets), so this makes sense. The kinds of data presented are also most common when they are most easy to present. Nearly 90% provide descriptive data analysis, and fully 50% provide no other form of analysis.

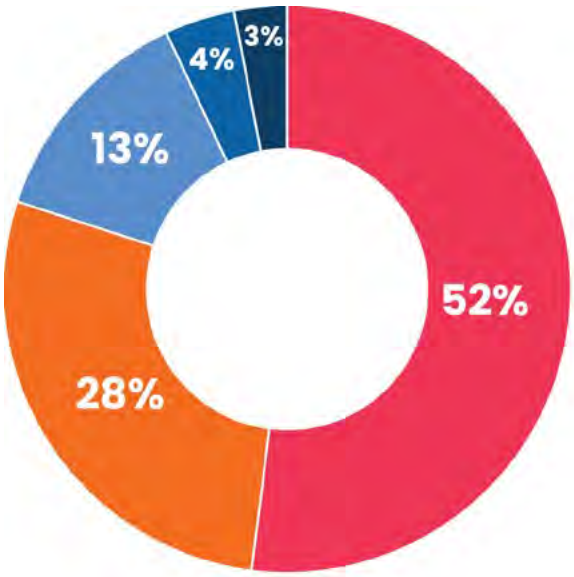
The survey also asked if respondents used machine learning or artificial intelligence (chatbots, for example) for five different tasks:

- Technical or administrative customer service.
- Membership or donor support.
- Program engagement or support.
- Predicting donors.
- Program tracking.

Barely 10% said yes to any of these tasks, evenly distributed. Organizational size and budget were correlated to this adoption with organizations that have larger staff and budgets more likely to be using machine learning or artificial intelligence tools.

FIGURE 29

Does your organization perform statistical analysis on program data?



Response	%
Descriptive only, such as average or sum	52%
Inferential, such as using statistics to understand the impact of various variables on program outcomes	28%
Predictive, such as using statistical models to predict individual program outcomes before they happen	3%
All	13%
Other	4%

Survey participants

Nearly 500 people responded to the survey, representing a wide variety of nonprofits. Nearly half work at organizations that provide direct social and public services (public or social benefit, human services, and education, each around 15% of respondents). The rest are well distributed across the other service areas.

Most respondents work at relatively small organizations, with over 50% having a staff of 50 people or fewer. Most represent nonprofits that have been in existence for some time. Nearly two-thirds of organizations have been around for 20 years or more, while only 8% were started five or fewer years ago. Budgets vary widely, but nearly three-quarters of respondents have annual budgets larger than $1 million.

The respondents themselves work with data in a wide variety of ways. Most (over 70%) provide reports and analysis. Nearly two-thirds are responsible for direct data entry. Many (nearly 50%) also work second-hand with data provided and analyzed by other staff. This range of data experiences provides them with a strong background to share insights throughout this survey.

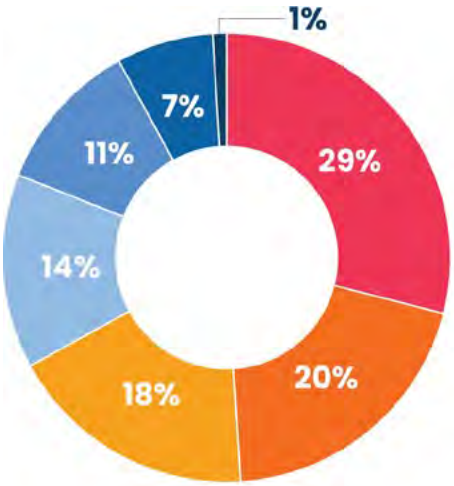
FIGURE 30

What best describes your organization's primary issue area?

Response	%
Human services	18%
Public or social benefit	15%
Education	15%
Environment or animal welfare	10%
Health	10%
Civil rights or advocacy	8%
Arts or culture	5%
Faith-based	5%
Youth	4%
International	3%
Housing	2%
Legal	2%
Employment	2%

FIGURE 31

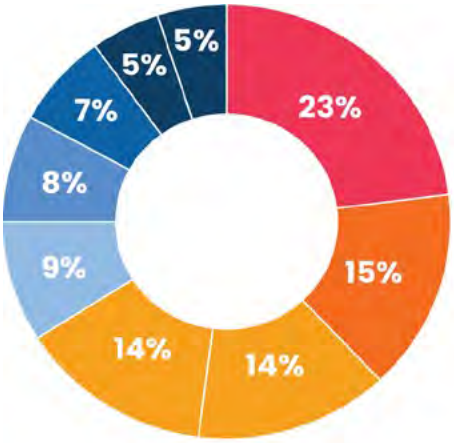
About how long has your organization existed?



Response	%
Less than one year	1%
1 to 5 years	7%
6 to 10 years	11%
11 to 20 years	18%
21 to 40 years	29%
41 to 75 years	20%
76+ years	14%

FIGURE 32

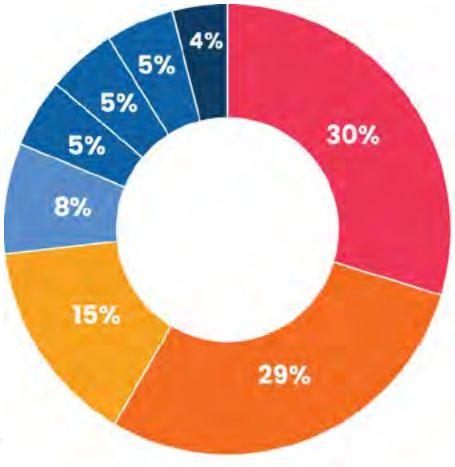
What is the size of your overall organization staff?



Response	%
Fewer than 5	14%
6 to 10	8%
11 to 25	23%
26 to 50	15%
51 to 100	14%
101 to 250	9%
251 to 500	7%
501 to 1,000	5%
Over 1,000	5%

FIGURE 33

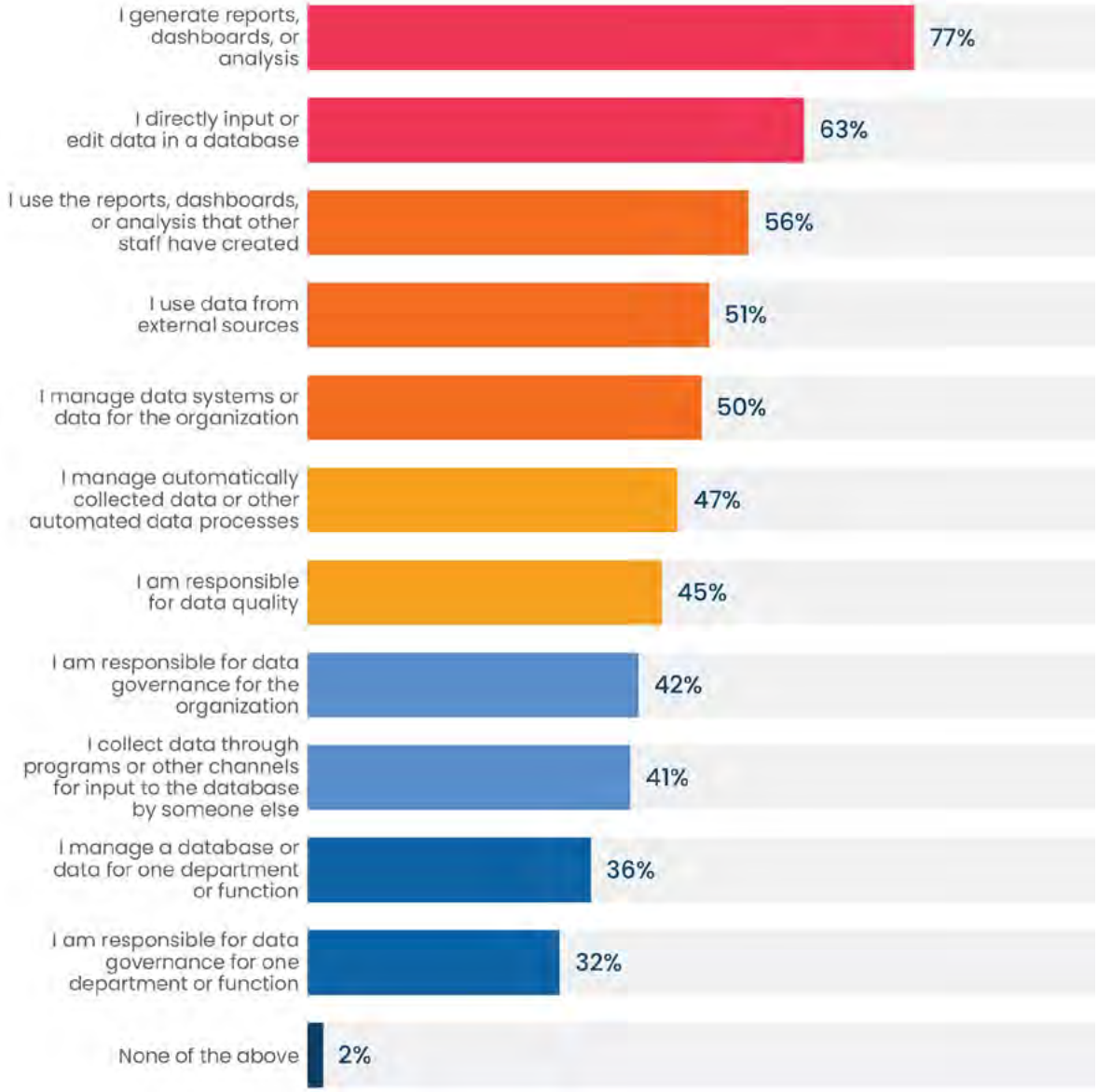
What is your organization's approximate annual budget?



Response	%
None, all volunteer	4%
Below $100,000	5%
$100,001 to $250,000	5%
$250,001 to $500,000	5%
$500,001 to $1 Million	8%
$1 million to $5 million	30%
$5 million to $10 million	15%
Over $10 million	29%

FIGURE 34

What is your relationship to your organization's data?



APPENDIX:

Data tables

The following tables are provided to increase the accessibility of this report for readers with disabilities. Each table corresponds to the chart with the same number in the narrative of this report.

TABLE 1: Roughly how many constituent records does your organization manage?

Response	%
Fewer than 500	9%
501 - 1,000: 8%	8%
1,001 - 2,500	8%
2,501 - 10,000	17%
10,001 - 25,000	14%
25,001 - 50,000	10%
50,001 - 100,000	10%
100,001 - 500,000	12%
More than 500,000	13%

TABLE 2: How does your organization collect data?

Response	%
By staff who enter it directly into our data systems	87%
Directly from constituents via our website	81%
Directly from constituents via paper	51%
Automatically via sensors, system processes, or tracking actions taken in our systems	34%
Indirectly from third parties like email lists from partners or purchased lists	31%
Other	8%

TABLE 3: How is your data accessed?

Response	%
Data is in a cloud-based database or constituent relationship management system that staff access online	90%
Data is in a locally-hosted database or constituent relationship management system that staff access when in the office	90%
Data is on individual computers for access only by that individual	20%
Other	5%

TABLE 4: What is the primary type of data storage system used for each of these departments?

Response	Microsoft Excel, Google Sheets, or Airtable	Off-the-shelf database for industry	Off-the-shelf database customized for you	Custom database
IT	41%	22%	25%	13%
Communications and marketing	40%	32%	21%	7%
Human resources	39%	35%	20%	5%
Programs	39%	22%	27%	12%
Fundraising and development	29%	36%	29%	5%
Finance	28%	43%	23%	6%

TABLE 5: How have the following factors influenced the data you collect?

Response	Major influence	Significant influence	Some influence	No influence
Improving program outcomes	40%	37%	19%	4%
Funders' priorities or grant reporting requirements	28%	28%	31%	13%
Marketing priorities	14%	35%	42%	9%
Board reporting priorities	15%	35%	38%	11%
External organizations or partners	11%	22%	48%	19%
Donors' interest areas	10%	20%	45%	25%

TABLE 6: Do you collect any of the following types of data?

Response	Always	Often	Sometimes	Never
Race or ethnicity	17%	26%	33%	24%
Self-identify as person of color	16%	21%	30%	33%
Gender identity (binary male/female)	16%	26%	34%	24%
Gender identity (expansive)	13%	24%	36%	26%
Disability	11%	15%	35%	39%
Pronouns	8%	17%	36%	39%
Sexual orientation	6%	11%	26%	57%

TABLE 7: What systems does your organization use for gaining consent to collect and use data?

Response	%
General statement on forms or surveys	74%
General statement on website	58%
Disclosure information included in emails	37%
Disclosure read to participants by a staff person	21%
Popup message on website	10%
Other	10%
None	7%

TABLE 8: Does your organization allow constituents to opt out of having their data stored or used by your organization?

Response	%
Always	33%
In some circumstances	38%
Never	10%
I don't know	19%

TABLE 9: In which of the following ways do you or your organization use data generally?

Response	Always	Often	Sometimes	Never
Internal reporting and evaluation	56%	33%	10%	1%
Program evaluation and improvement	38%	39%	21%	2%
Board reporting and evaluation	35%	44%	19%	2%
Strategic planning	35%	34%	29%	2%
External reporting and evaluation to funders and sponsors	32%	35%	27%	6%
External reporting and evaluation to donors and community	29%	32%	36%	4%
Communications evaluation and improvement	24%	36%	35%	5%

TABLE 10: In which of the following ways do you or your organization use data strategically?

Response	Always	Often	Sometimes	Never
Inform annual planning	26%	44%	27%	3%
Report against internal team or organizational goals	23%	42%	30%	5%
Inform regular decision making	19%	41%	38%	2%
Analyze constituent engagement or actions	19%	41%	33%	7%
Plan programs or make changes	17%	42%	36%	4%
Plan communications or campaigns	16%	40%	36%	7%
Predict donations or other actions (machine learning)	10%	21%	30%	39%

TABLE 11: In which of the following ways do you share data?

Response	Always	Frequently	Sometimes	Never
Internally with some staff (within departments or leadership)	28%	49%	21%	1%
Internally with the board	18%	41%	38%	4%
Externally in grant reports	18%	40%	34%	8%
Internally with all staff	17%	34%	42%	8%
Externally in program or impact reports"	10%	32%	52%	6%
Externally with partners	8%	20%	61%	2%
Externally in marketing	7%	25%	59%	9%

TABLE 12: If you provide data for grant reports, which of the following options most closely align with your process?

Response	%
We provide custom reports of our program or other organization data to match the funders unique reporting requirements	71%
I don't know	15%
We provide standardized reports of our program or other organization data so that all of our reporting is the same	8%
Other	5%

TABLE 13: If you collect data on race, ethnicity, gender identity, sexual orientation, or disability, do you use this data to make decisions about service or program delivery?

Response	%
Yes, but we don't talk about this publicly	22%
Yes, we talk about this publicly	32%
No	26%
We do not collect this data	20%

TABLE 14: Which of the following data standards are policies do you monitor?

Response	%
GDPR (General Data Protection Regulation)	59%
PCI (Payment Card Industry)	46%
HIPAA (Health Insurance Portability and Accountability Act)	44%
CAN-SPAM/CASL (Controlling the Assault of Non-Solicited Pornography and Marketing Act/ Canada's Anti-Spam Legislation)	27%
FERPA (Family Educational Rights and Privacy Act)	23%
Other	5%

TABLE 15: What policies related to data does your organization have in place?

Response	Data retention	Data archiving	Data access	External data sharing
Custom policy specific for organization	24%	27%	27%	26%
Generic policy not adapted to organization	24%	21%	18%	19%
No policy	17%	22%	18%	20%
Custom policy explained to all staff	14%	10%	14%	14%
Custom policy with regular review and training	9%	7%	11%	11%
I don't know	12%	13%	12%	10%

TABLE 16: Who in your organization is responsible for ensuring the organization is compliant with relevant laws or data policies?

Response	%
IT director (or equivalent IT leader)	21%
Operations, human resources, or finance department	16%
CEO or ED	15%
Committee of multiple staff or departments	13%
Other	12%
I don't know	12%
Program director (or equivalent program leader)	4%
Development director(or equivalent development or fundraising leader)	3%
Consultant or third party entity	2%
Marketing director (or equivalent communications or marketing leader)	2%

TABLE 17: WHO HAS AUTHORITY FOR ADOPTING NEW TECHNOLOGIES THAT COULD HAVE IMPACTS ON DATA COLLECTION OR USE?

Response	%
CEO or ED	52%
IT director (or equivalent IT leader)	52%
Operations, human resources, or finance department	36%
Committee of multiple staff or departments	29%
Development director(or equivalent development or fundraising leader)	27%
Program director (or equivalent program leader)	26%
Marketing director (or equivalent communications or marketing leader)	24%
I don't know	7%
Other	3%
Consultant or third party entity	2%

TABLE 18 : Provide the full-time equivalent amount for the following responsibilities fulfilled by a staff person inside your organization.

	Database administration	Data quality	Data collection	Report creation	Impact analysis and evaluation
Average (mean)	3.36	3.53	12.63	5.19	4.98

TABLE 19 : Provide the full-time equivalent amount for the following responsibilities fulfilled by a consultant or third-party entity responsible for your organization's technology and/or data.

	Database administration	Data quality	Data collection	Report creation	Impact analysis and evaluation
Average (mean)	0.96	0.94	1.45	0.96	1.10

Table 20: Who participates in the following activities at your organization?

Response	Individual staff	All staff	Consultant	Volunteer	Board
Creating reports	86%	17%	16%	5%	4%
Monitoring policies	85%	12%	9%	3%	22%
Training staff with data systems or use	84%	15%	17%	4%	3%
Analyzing data	83%	20%	18%	5%	12%
Planning for data use	82%	23%	13%	3%	11%
Planning for data collection	81%	24%	19%	7%	8%

TABLE 21: Which of the following are challenges for you and your organization in data collection?

Response	%
Individual's staff time	76%
Individual's processes or data input	69%
Organization's tools or software	66%
Individual's understanding of data value	60%
Organization's strategic view of data	58%
Complex funder reporting expectations	35%
Other	4%

TABLE 22: Which of the following are challenges for you and your organization to successfully adopt technology that supports successful data use?

Response	%
Staff to manage and implement technology	77%
Overall knowledge or skill level of staff	72%
Funding	61%
Tools or systems not aligned with workflow or needs	55%
Perception of value of better use of data	45%
Resistance from leadership	25%
Other	7%

TABLE 23: Rank the following challenges in data use in order of impact for your organization. 1 is the highest challenge and 6 is the lowest challenge.

	Individual's data literacy or skills	Individual's strategic application of data	Organization's appropriate tools or software	Organization's data silos by department or team	Data quality	Complex funder reporting expectations
Average (mean)	3.09	3.25	3.28	3.39	3.21	4.63

TABLE 24: . In the coming three to 12 months, which of the following investments or projects do you or your organization plan to undertake?

Response	%
Program or impact evaluation	61%
New internal reporting or analysis	60%
Training staff on data collection, use, or management	60%
Redesigning your website	46%
Migrating to a new database or constituent relationship management system	34%
New external reporting or analysis	28%
Transitioning events, services, or other programs because of COVID-19	20%
Other	11%

TABLE 25: What is the percentage of staff at your organization with the skills and access to create and run customized reports from your data?

Response	%
0 - 10%	37%
11 - 25	34%
25 - 50	16%
50 - 75	8%
75 - 100%	5%

TABLE 26: Which of the following resources would be most valuable to your organization?

Response	Very valuable	Valuable	Somewhat valuable	No needed
Dedicated funding for data management and analysis	51%	28%	15%	6%
Updated or upgraded tools or systems	38%	35%	20%	7%
Staff training	37%	38%	21%	3%
Eliminated paper or duplicative processes	31%	29%	24%	17%
Consulting (pro-bono or paid)	28%	33%	30%	9%
Improved user interface or user profile options on website	27%	31%	26%	16%
Technology and systems audit	26%	32%	31%	10%
Templates or other resources	17%	29%	43%	11%
Case studies	10%	17%	46%	27%

TABLE 27: In what formats do your staff present data internally or externally?

Response	%
Graphs and charts	92%
Data tables	84%
Dashboards (real-time data)	55%
Infographics	53%
Interactive data visualizations	23%
Other	5%

TABLE 28: What is included in your organization's data analysis?

Response	%
Descriptive statistics	92%
Qualitative analysis	53%
Statistical analysis	37%
Data visualization for analysis	38%
Data mining	25%
Predictive analytics	27%
Geospatial analysis	26%
Other	3%

TABLE 29: Does your organization perform statistical analysis on program data?

Response	%
Descriptive only	52%
Inferential	28%
All	13%
Other	4%
Predictive	3%

TABLE 30: What best describes your organization's primary issue area?

Response	%
Human services	18%
Public or social benefit	15%
Education	15%
Environment or animal welfare	10%
Health	10%
Civil rights or advocacy	8%
Arts or culture	5%
Faith-based	5%
Youth	4%
International	3%
Housing	2%
Legal	2%
Employment	2%

TABLE 31: About how long has your organization existed?

Response	%
Less than one year	1%
1 - 5 years	7%
6 - 10 years	11%
11 - 20 years	18%
21 - 40 years	29%
41 - 75 years	20%
76+ years	14%

TABLE 32: What is the size of your overall organization staff?

Response	%
Fewer than 5	14%
6 - 10	8%
11 - 25	23%
26 - 50	15%
51 - 100	14%
101 - 250	9%
251 - 500	7%
501 - 1,000	5%
Over 1,000	5%

TABLE 33: What is the approximate annual budget of your organization?

Response	%
None, all volunteer	4%
Below $100,000	5%
$100,001 - $250,000	5%
$250,001 - $500,000	5%
$500,001 - $1 Million	8%
$1 Million - $5 Million	30%
$5 Million - $10 Million	15%
Over $10 Million	29%

TABLE 34: What is your relationship to your organization's data?

Response	%
I generate reports, dashboards, or analysis	77%
I directly input or edit data in a database	63%
I use the reports, dashboards, or analysis that other staff have created	56%
I use data from external sources	51%
I manage data systems or data for the organization	50%
I manage automatically collected data or other automated data processes	47%
I am responsible for data quality	45%
I am responsible for data governance for the organization	42%
I collect data through programs or other channels for input to the database by someone else	41%
I manage a database or data for one department or function	36%
I am responsible for data governance for one department or function	32%
None of the above	2%