

MAKING **WISE DECISIONS**

A Step-by-Step Guide to Picking the Right Data System

PREVIEW

Toolkit | makingwisedecisions.org

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with additional support from:

Making Wise Decisions: A Step-by-Step Guide to Picking the Right Data System
written by Betsy Baum Block, Corey Newhouse, and Justine Wolitzer and published
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A digital version of this publication is available at makingwisedecisions.org.

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INTRODUCTION

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Welcome to Making Wise Decisions

Thanks so much for utilizing *Making Wise Decisions: A Step-by-Step Guide to Picking the Right Data System*. We're thrilled that you want a data system that works for your organization!

Who is Making Wise Decisions for?

Making Wise Decisions was developed for small to midsized mission-driven organizations that want to better manage information about the services they provide. In other words, if your annual budget is $5 million or smaller, and you need to collect information about the people you serve, this toolkit is for you!

We created this toolkit to help organizations navigate the tricky process of figuring out what kind of information and reports they need, what sort of system will best meet those needs, and how to implement the new data tools well. This toolkit will support organizations just considering adopting a formal data system, and those with longstanding data collection and use practices in place.

Regardless of your organizational budget, if you want to find a better data system, this toolkit can help.

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How do I use Making Wise Decisions?

Making Wise Decisions is an intuitive, easy-to-use guide. Each step is a separate chapter in the guide, with background on why that step matters, suggested tasks, a template to help you and your team, and additional resources.



Time for this activity

Anticipated time to complete



Why are you doing this?

Clear statement of "why"



Keep in mind

Guiding language on how to approach the work



Suggested Steps

Step-by-step instructions to move ahead



Other Resources *Resources to help you deepen your understanding*

Begin by completing the organizational quiz (**makingwisedecisions.org**), which points to the types of data systems most likely to meet your organization's needs, and offers a suggested starting point in the guide.

Or, flip through the guide and find the step that best aligns with where your organization is right now. You can always circle back to an earlier chapter.

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How long will this take?

An estimate of the hours required to complete the suggested steps is at the start of each chapter. Each takes three to twenty hours to complete. Depending on your organization's capacity and the urgency of finding a data system, working through all of the steps will take six to twelve months.

You may have the staff to handle this internally, but you can also consider hiring an external consultant to manage the process. If you do, make sure that the consultant focuses on navigating the process and that all critical decisions come from within the organization. The budget section helps you consider the cost of an external consultant for the overall process.

Why does the process take so long? (or understanding the key phases of finding a data system)

Implementing a new data system requires a lot of thought, which we group into three phases. Careful planning ensures that you do it right the first time—we know you've heard the stories of the organizations that took shortcuts and faced costly overruns and unanticipated delays.

INTENTION	READINESS	SELECTION AND IMPLEMENATION
Understand the reasons for moving to a new system and critical indicators of success.	*Document your detailed needs for a great system.*	*Pick the vendor; launch and succeed postlaunch.*
» **Understand Why You Need a New Solution**	» **Name the Project Team**	» **Find Likely Vendors**
» **Define Your Reporting Needs**	**Create a Program Model**	» **Conduct Interviews and Reference Checks**
	» **Document Your Workflows or Map the Journey**	» **Launch the New System**
	» **Map Your Data**	
	» **Create Your Budget and Timeline**	

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Keep in mind that the action doesn't end once the system is launched. Successful data system implementations require ongoing efforts to maintain healthy systems.

I want to know more!

Check out the acknowledgments section at the end of this guide for a description of who was involved in creating *Making Wise Decisions*.

Want to access more resources or contact the creators? Visit **makingwisedecisions.org**.

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READINESS

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Name the Project Team



Time for this activity

1–2 hours to select critical team members

3–6 hours to discuss and adjust job descriptions

2–3 hours for a kick-off meeting

Ongoing time for regular project team meetings



Why are you doing this?

Putting the right team together is crucial for success. Organizations that rely on the software vendor to handle everything or that load the entire project on a single person tell tales of painful, unsuccessful implementations. Having the right team in place will ensure the following.

- The resulting software supports multiple departments' needs.
- Sufficient resources/capacity are in place to manage a project from start (documenting organizational readiness) to finish (implementation and adoption) and beyond.

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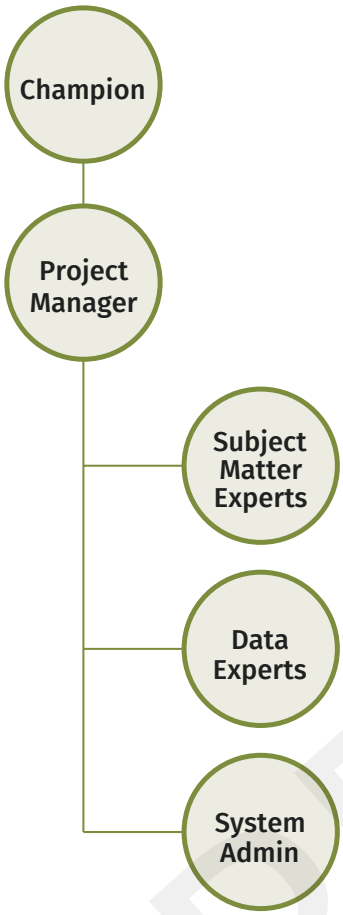
Key roles



The team can be as small as two people (project champion and project manager should be two different people), as long as all the roles described below are assigned.

Project Manager

The project manager (PM) will manage the entire life cycle of the project. While not necessarily a technical role, the PM takes day-to-day responsibility for the ins and outs of a data system implementation and is a primary job responsibility.

- Manage the selection process
- Manage budget and timeline
- Clearly communicate the "functional requirements" (aka what the software will do)
- Have (or build) strong collaborative relationships with internal staff and the software vendor

In some instances, organizations may hire a contractor to be the project manager. In this case, it is critical that the PM has strong connections to the organization's staff and ensures key decisions are understood and owned by the organization.

Champion/Sponsor/Decision Maker

The champion is an organization leader and part of the organization's executive team. This role is responsible for supporting the project manager's decisions and marshaling organizational support for those decisions. The champion has authority over the budget for the project.

PRO TIP

You want varied perspectives, but balance that against having too many cooks in the kitchen.

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PRO TIP

Don't just layer working on the implementation onto someone's current job.

Adjust or create a job description that addresses this role, so that other responsibilities are adjusted accordingly.

Subject Matter Experts

SMEs are people who will voice how programs work. The SMEs can articulate the needs of the program and also consider potential impacts of technical decisions on how programs operate. While one person can act as an SME for multiple programs, every program should have an SME on the team.

Data Experts

The data experts are the people who know where all the data lives at an organization and the business rules behind how data is stored.

System Administrator or IT Expert

The system administrator or IT expert will keep the system running once the vendor has completed the scope of work. For "custom ready" models, the system administrator often handles ongoing system configuration needs. In addition, the system administrator will also support the actual rollout and anticipate any impacts to the organization's existing hardware and software (for instance, replacing unsupported browsers).

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Suggested Steps

1 Identify the champion and project manager.

As discussed on the previous pages, having a dedicated project manager is the crucial first step. Don't neglect to make sure that the project has a champion who will advocate for the project at the organizational leadership level.

2 Do a reality check on the total full-time equivalent (FTE) staff that can be dedicated to the project.

Selecting a new data system requires focused effort and energy; job descriptions and expectations should reflect that.

3 Clearly identify all staff to be engaged in the process.

Once the timeline has been roughed out, make sure that all phases are supported and the key people to fill each role are identified. This can be done collaboratively or can be assigned by the champion.

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Other Resources

Idealist Job Descriptions
Scan job descriptions to see what is needed and the time allocation given to this role. Using "evaluation" as a key word will bring up research directors and data analysts.
http://www.idealist.org/

4 Adjust the project team's workload.

Be realistic about the anticipated time to support the project and ensure that managers adjust the workload for each team member.

5 Kick it off right.

Include the entire project team in a kickoff and clearly describe each member's roles and time commitment. Ensure that the kickoff lays out all the critical activity in the project and also builds some team spirit to ensure great collaboration.

> "I wish we would have looked more at organizational capacity, and how to on-board the system with new staff. We didn't really understand the amount of effort it would take to get everything set up. Instead of shifting responsibilities around, or bringing in someone new, [the project] was added on top of people's loads, and we realized later the need to increase capacity."

—Jenny Ocon,
UpValley Family Centers

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Name the Project Team

» *The * roles are what you need, at a minimum, to succeed in this project. All other activities can be rolled up into the project manager.*

» *Adapt FTE and specifics as needed for your organization and process. Those included are offered as suggestions.*

» *If your project timeline is long and/or complex, you may get more detailed on the different project phases when you are working on detailed project plans, but this will be sufficient for identifying your team.*

Role	Who	FTE	Phase 1 Role (Intention)	Phase 2 Role (Readiness)	Phase 3 Role (Selection/ Implementation)
***Project Manager**		0.75	» Keep team on task. » Prepare critical documentation. » Work with vendor. » Prepare budget.	» Prepare project timeline. » Ensure job descriptions for teams are complete.	» Handle ongoing project management.
***Champion/ Sponsor/ Decision Maker**		0.1	» Get approval for project at executive level. » Create buy-in for assigning roles. » Secure budget.	» Ensure resources/ staff are officially allocated and assigned.	» Make critical decisions. » Support adjustments to budget/timeline. » Communicate to executive team.
Data Expert(s)		0.25	» Identify key needs and constraints.	» Identify where the data lives and document migration needs.	» Prepare files for migration.
System Administrator/ IT Expert		0.25		» Support data mapping.	» Train on configuration/ support implementation.
Subject Matter Expert(s)		0.25 per program	» Articulate the need and anticipated change.	» Identify business requirements.	» Support testing.

Access this template on Google Drive™ here:
https://drive.google.com/drive/u/0/folders/142MkYUsTnPk8IWU0vqw4xw4TlpshE8qu

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Acknowledgments

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