



SAVI
Training Curriculum

MODULE 2B

CREATE AND USE CLIENT DATA

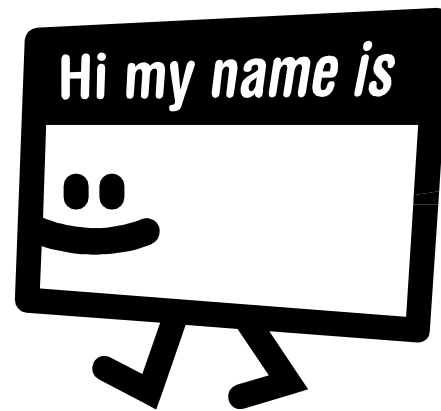
Our Agenda

Introductions, Curriculum Overview	5 min
Review and Topic Introduction	5 min
Choosing a Data Collection Method	10 min
Collecting Data	10 min
Collecting Data - Demographics	20 min
Collecting Data - Participation	20 min
Collecting Data - Outcomes	20 min
Client Location	20 min
Data Management	15 min

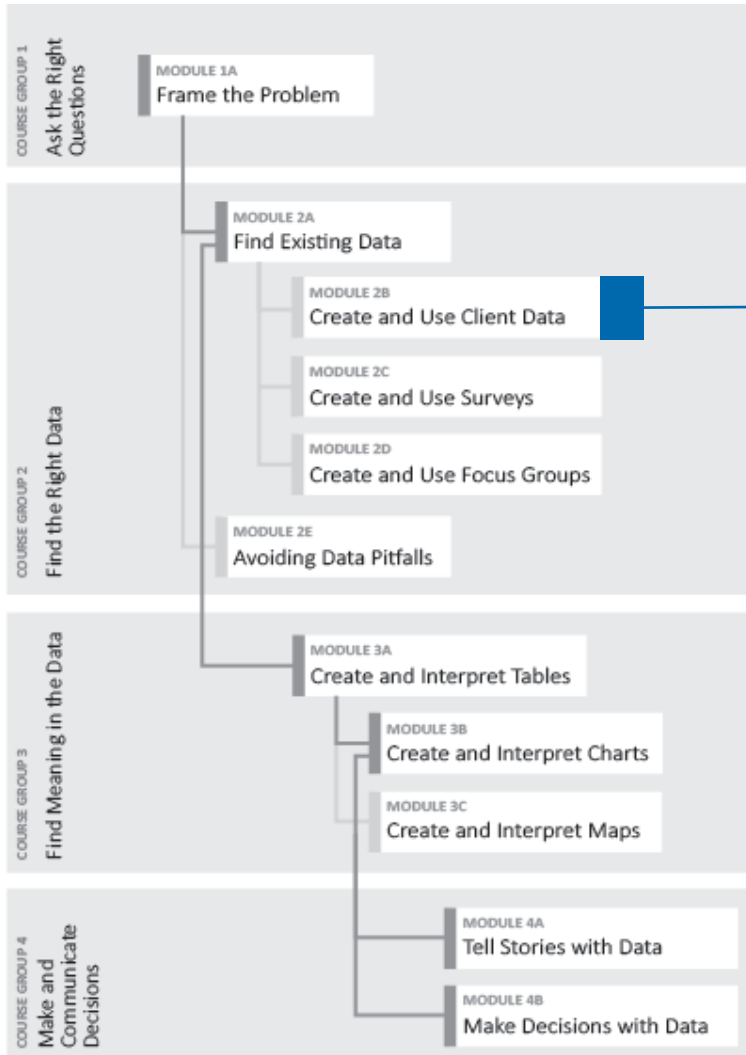


Introductions

Let's share our name, organization, and experience with SAVI.



Where We Are in the Training Curriculum



We are here, learning how to use data from our clients.

What We Will Learn

- Learn benefits of client, survey, and focus group data
- Determine what you can learn from client data
- Learn to map your client locations





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Choosing a Data Collection Method

Data Collection Methods

Method	Key Facts	Advantages	Disadvantages
Surveys	<ul style="list-style-type: none">Quantitative analysisDate on large groupsRepeatable over time	<ul style="list-style-type: none">Good for descriptive dataMultiple topicsCan be inexpensiveQuick analysis with software	<ul style="list-style-type: none">May include biasMay lack depthMay lack contextLimited to what you ask
Focus Groups	<ul style="list-style-type: none">Group interviewGathers perspectives and opinionsResponses grouped into themes and categories	<ul style="list-style-type: none">Richer, more detailed dataAdded depthOpen-ended conversationMultiple perspectives	<ul style="list-style-type: none">Slower to analyzeRelies on moderator's skillsMore bias and variability
Interviews	<ul style="list-style-type: none">Conducted in person or by phoneStructured, semi-structured, or unstructuredClear, focused, open-ended questions	<ul style="list-style-type: none">Richer, more detailed dataAdded depthFace-to-face contact	<ul style="list-style-type: none">Time-consumingRelies on interview's skillsOne perspective at a time
Client data	<ul style="list-style-type: none">Use any method, targeted to your clients	<ul style="list-style-type: none">Data specific to your clients/ organization	<ul style="list-style-type: none">May be time consuming to collect, retrieve, and analyze

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Collecting Data

What Can We Learn from Client Data?

Throw out some ideas.

- Who are your clients?
- What kind of data do you collect about clients?
- What could your organization learn from client data?



What Can We Learn from Client Data?

We can learn who are clients are.

- Demographics
- Where they live

We can learn about how programs are serving clients.

- Participation
- Outcomes



How and when can you gather these data?

- Demographics
- Where they live
- Participation
- Outcomes



Let's walk through each kind of data.



Collecting Demographics

- Demographics are often collected at intake, but can be updated frequently according to the agency's or client's needs.
- Knowing the date when the data was collected is important.
- Some demographic data don't change, but some do.
- What are some demographics that can change?



Analyzing Demographics

Let's dig into a dataset.

What can we learn from this data?

What problems do you see in the data?



Group Work

Working in groups, summarize the race, age, and gender of clients.

3 groups

**10 minutes to
work**

**5 minutes
each to
present**



Collecting Participation Data

- What is important to know about the way clients participate in your programs/services?
- How can you capture those important facts in a standardized way?
- Do you want to look at the change in the client's participation over time?



Collecting Participation Data

Many kinds of participation data:

- Binary (did or did not participate)
- Discrete (participated in part of a whole program, e.g., 5 out of 7 classes)
- Continuous (started on a certain date and ended or will end on a certain date)



Analyzing Participation

- What kinds of questions can you ask of the participation data?
- How can you analyze this information?



Class Work

Working together as a class, let's learn how many people participated in financial education, tutoring, and counseling.



Group Work

Are the gender breakdowns of these services different? Let's split into 3 groups to discover this.



Class Work

As a class, let's find out which program people participate in longest.



Collecting Outcome Data

- What do you want to know about the ways programs affect client outcomes?
- Balance the time/effort needed to follow up with clients with the data needed to improve outcomes and program performance.
- What else do you need to consider when collecting client outcomes?



Collecting Outcome Data

- Outcomes should be based on program or organizational goals.
- Outcomes are usually compared to baseline or expected results.
- Outcomes should be measurable.



Collecting Outcomes

For example, if you have an employment counseling program, you may want to learn if your clients are improving their income or getting jobs.

- Measure income and employment *before and after* the client participates in the program.
- Impact of the program may be delayed, so follow up 3-6 months after program completion to see if there is a change in the outcome.



Analyzing the Data

- What kinds of questions can you ask of the Output data?
- How can you analyze this information?



Class Work

What kind of income change did people experience in each program? As a whole?



Client Location

What can you learn from clients' locations?



Client Location

What can you learn from clients' locations?

- Where are they?
- What are the characteristics of their neighborhood?
- What resources are available where they lived? Or work?
 - Schools
 - Churches
 - Community Centers



Client Location

How can you map this information?

1. Aggregating
2. Geocoding & Mapping

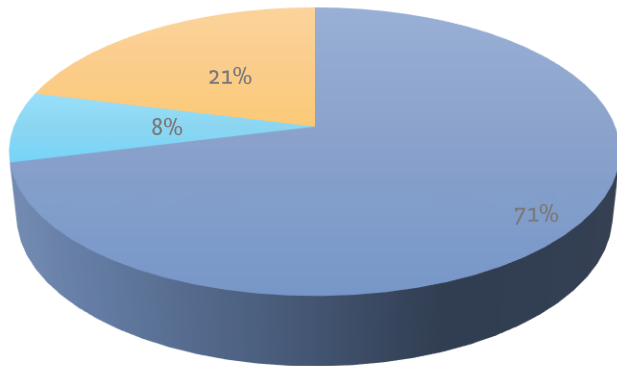


Client Location

2. Aggregating

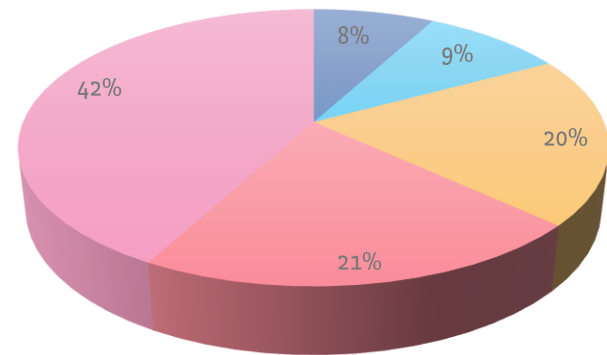
- You can compare the clients location in excel by zip codes, or other recognizable locations such as cities or counties.

City



■ Indianapolis ■ Beech Grove ■ Lawrence

Zip Code



■ 46107 ■ 46201 ■ 46203 ■ 46218 ■ 46226

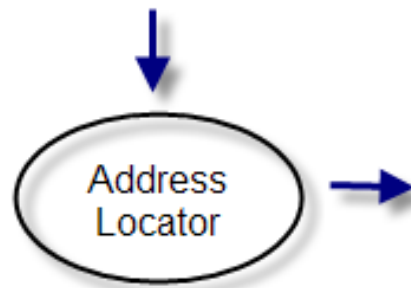


Client Location

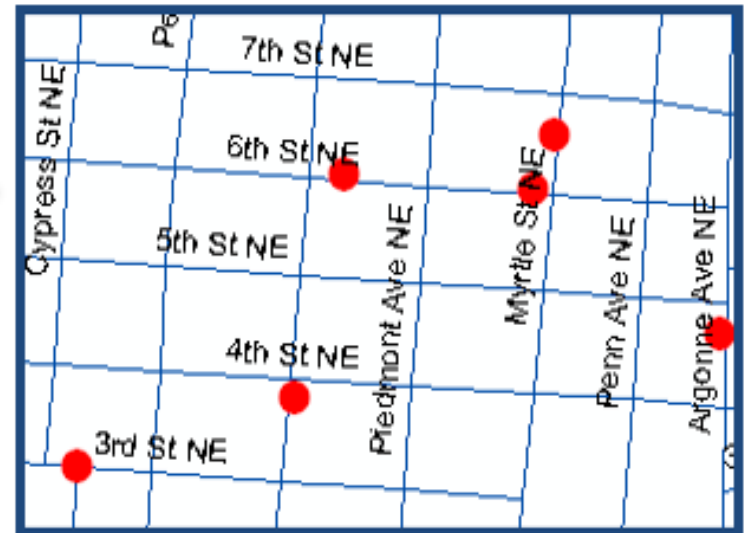
1. Geocoding & Mapping

Geocoding is the process of turning addresses into point locations, or coordinates, on a map.

	NAME	ADDRESS	CITY	S
▶	Ace Market	1171 PIEDMONT AVE NE	ATLANTA	G,
	Andrew's Gasoline	1670 W PEACHTREE ST NE	ATLANTA	
	AP Supermarket	4505 BEVERLY RD NE		G,
	Atlanta Market	241 16TH ST NW	ATLANTA	G,



● Geocoded point for the matched address



Client Location

1. Geocoding & Mapping

- It allows you to know the exact location but it is time consuming and requires specific knowledge about mapping tools.
- Resources:
 - If you have [ArcGIS](#), you already have a geocoder
 - [Texas A&M GeoSources](#) (Free geocoding)
 - [GPS Visualizer](#) (Free geocoding, limited mapping)
 - [Mapline](#) (Free and subscription-option geocoding)
 - [SAVI](#) (Free geocoding, limited free mapping, and fee-based full service GIS analysis. Call for consult.)





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Data Management

Data Management

- Know what personally identifiable information (PII) is. Client data is probably personally identifiable information.
- Never send PII through email. Only use secure transfer and storage protocols. Never store PII on your phone, laptop, personal Google Drive or Dropbox accounts.



Data Management

- Keep all client data in a secure folder with limited access to only those who need it. Do not store client data on public drives or folders.
- Only allow access to client data on a need-to-know basis.
- Always lock your workstation, even if you only step away for moment, especially if you regularly view or enter client data.



Any Questions?

