

Choosing a Data System for your Promise Neighborhood

Suggested Criteria and Functions

In order to build a strong Promise Neighborhood and be well-positioned to seek funding and demonstrate success, communities should incorporate a robust data collection and evaluation plan into their work. Those seeking federal funding will need to meet Department of Education requirements, but we highly recommend that all communities use a comprehensive data system to collect and organize data, and help inform decision-making.

The Promise Neighborhoods Institute at PolicyLink worked with its network of Promise Neighborhood leaders to collect a set of suggested critical criteria, functions, and guiding questions to use in order to review potential database vendors. These guidelines are intended to be a starting point for community discussions about data systems, and can be altered to reflect the specific needs of a Promise Neighborhood.

There are two distinct parts of the federal Promise Neighborhoods grant that focus on data:

1. **A longitudinal data system** (individual-level data collected over the long term);
2. **A needs assessment** focused on 12 indicators that sites need to collect on neighborhood-level data and other indicators more connected to individual-level data (through the longitudinal data system).

Overall Criteria

1. Accessibility and Relevance

Staff members have to find the data system useful and relevant to their work in order for them to use it productively. If users find the system accessible and relevant, they are more likely to enter accurate data. Accurate and timely data entry makes subsequent extraction and analysis easier and more efficient for evaluators and program staff, which results in the most accurate analyses. There are also two aspects of accessibility that are of particular importance to Promise Neighborhoods:

- a. A system that limits access to individual data based on parental consent could prove extremely helpful to communities. If parents change their minds about allowing access to their child's data, a good system would include or remove the individual's data from reports.
- b. Ideally, the lead organization could easily add or remove agency access to the database based on changes to the collaboration.

2. Understanding How the System Will Support Continuous Learning, Program Improvement, and Accountability

- a. A good vendor should assess needs within each Promise Neighborhood and determine how the data system can meet those needs. This includes being clear on what types of

data will need to be tracked and translated. Sites should ask for a demonstration of how that is done in the software system.

- b. Data system vendors must be able to work with consultants or evaluators engaged by the Promise Neighborhood site purchasing the system. Each Promise Neighborhood has a different capacity to manage data, and a good vendor should have experience and capacity working with users at a range of experience levels.
- c. The system should be developed with a long-term data vision, including the ability to capture longitudinal data.
- d. The system should have the potential to permit a phased rollout over time or all at once, as per the needs of the individual site.

3. Budget

The vendor should clearly outline the budget determined for start-up, ongoing usage and growth. For example, is there a flat rate for unlimited users? Will the price increase per user, per site, or per computer? Also indicate any change based on the number of participants or records.

The cost of ongoing support and technical assistance or training should be made clear, and you should clarify whether there will be any costs to add new functions that the vendor has not yet developed.

4. Technical Assistance

- a. Outline the technical assistance that the vendor will provide.
- b. Provide clear guidelines about what kinds of help are available, a timeframe for meeting a site's requests for assistance, and any additional costs associated with different types of support.

5. Training

- a. Outline the kind of training included in the package:
 - i. Indicate to whom the training is geared (i.e. IT, program and/or evaluation staff).
 - ii. Provide detail about the type, format, and content of both new user/account trainings and ongoing trainings (describing which components are free and which incur additional cost).
 - iii. Provide customized trainings for regular and new staff and state any additional costs.

Functions

1. Access

- a. The database should be accessible from different locations via the web (to enter, view, and/or pull information) in real time.
- b. The database should allow for tiered access to data; the vendor should explain how that works and who manages the access.
- c. Partners at different sites should be able to access and input data into the same database.

2. Flexibility

- a. The data system should include the ability to create different staff reports based on unique needs, and should make it easy for organizations to create new reports, i.e. funder reports.
- b. The vendor should explain how new data fields are added.

- c. The system should permit tracking of different types of data (demographics, attendance, outcomes, assessments, etc.) that the organization/community needs, and allow monitoring of changes to those data.

3. Ad-hoc reporting

The vendor should explain how:

- a. The system tracks data over time within sites.
- b. Organizations can track multi-site participation within a given time period and have the ability to keep individuals in the system after they have completed a discrete program.
- c. Organizations would create duplicated and unduplicated counts of participants served.
- d. Communities would drill down into summary reports to get details.
- e. Retention can be easily tracked.
- f. To track reports on families.
- g. To track individuals with a unique ID across agencies. The system needs to ID people using a system that is not based on Social Security Numbers or address.
- h. To track and create cohorts of participants who join programs at a certain time.
- i. To track and retain obsolete information such as changes of address or contact people.
- j. To manage more complex reporting (such as combining demographic, language, gender, attendance, outcome, and assessment data into one report with possible filters for each type of data).

Report capabilities could include:

- i. Tracking retention rates and logging people over time.
- ii. Measuring all 12-15 indicators.
- iii. Evaluating program performance and improvement over time.
- iv. Measuring 1:1, 1:multiple, or multiple:multiple outcomes.
- v. Tracking referrals between organizations and delineating which people access which services from which organizations. This should include all members of a family/ household and individuals.
- vi. Determining academic outcomes.
- vii. Tracking individual-level outcomes over time.
- viii. Assessing program utilization by participant (i.e. How many services does a person use? How many people are taking a specific class? How many times did they enroll in the class? What organization referred them?)

4. System Capacity

The vendor should describe:

- a. The size of the vendor's current largest client.
- b. The maximum size of client/amount of data that the system is designed to hold.
- c. The maximum size of the reports that can be run and the speed that it can be run in given high volumes of data stored in the system. Vendor should define "high-volume."
- d. The system's capacity to operate on all of the operating systems that the agency maintains (IBM-compatible and Mac compatible, if pertinent to the agency)

5. Data Integration

The system should have the:

- a. Ability to upload historical participant data. Describe how this is accomplished and whether there is a fee if performed by the vendor.
- b. Capacity to initially load existing information, plus piecemeal data.
- c. Ability to integrate with other systems; i.e. downloading data into Excel, SPSS, nSQEL.

- d. Ability to link information about program services and activities to outcomes for program participants.
- e. Ability to integrate with calendar and email applications to track deadlines/send reminders.

Describe what the individual data entry vs. group batch data entry functionality looks like for use on an ongoing basis.

6. Usability

- a. For program/line staff:
 - The vendor will:
 - i. Walk through a sample data entry process.
 - ii. Describe the clarity and ease of understanding of the various formats that staff will need to use to view the data.
 - iii. Describe how easily staff can pull or view the data.
 - iv. Explain the system's user-friendliness (i.e. the level of education and or ease with technology that is required of users).
- b. For management staff:
 - i. Describe the ease of pulling/looking at summary data useful to management; in particular type of dashboard/summary screen with key indicators/outcomes and easy to run reports.
 - ii. Show the ability to monitor staff usage of the system.
- c. Indicate the level of IT support staff the system requires.
- d. Describe the staffing structure the vendor recommends that sites develop to oversee the system.

7. Accuracy

- a. Describe how one performs data quality checks

8. Data Security – data corruption

- a. Access to administrative data.
- b. The system's ability to trace who accessed and made changes.
 - i. Data entry/changes
 - ii. System set up changes
- c. The change management process if one needs to add a module.
- d. The auto back-up system.
- e. The data restoration process work.
- f. System back-ups for agencies able to receive system back-ups, the costs associated with that, and how frequently organizations can receive data back-ups.

9. Mobile platform

- a. System able to provide connectivity and mobile version of the database front access.
- b. Multi-platform development (android, iOS) for devices like iPad and smart phones for data entry and export prebuild reporting.
- c. Third party development openness, for those organizations with in-house developers to integrate the mobile solutions to the system.