



STAND **SMART** FOR HEROES

GOT YOUR 6 PARTNERS **Determining the Right Data Tool for Your Community-Based Partnership**

ABOUT STAND SMART FOR HEROES

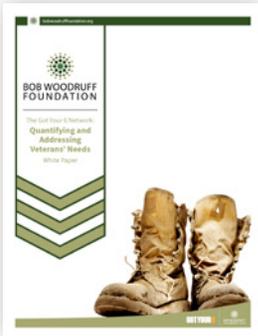
The Bob Woodruff Foundation is proud to partner with best-in-class scientific organizations to provide important research findings to the community of organizations that represent and serve post-9/11 veterans, service members, families, and caregivers. For more information on the Bob Woodruff Foundation and Stand SMART For Heroes, please see bobwoodrufffoundation.org.

ISSUE/CHALLENGE

Like any well-run non-profit organization, community-based partnerships serving the military and veteran population need to collect and keep detailed records of clients, services they provide directly, referrals to community partners, and donations. Tracking such data helps an organization understand who it is serving, what trends are occurring in requested services, and what initiatives it should focus on in the future. Such efforts ensure that an organization is meeting veterans' needs and that it looks appealing to funders. At a time of growing emphasis on accountability for donors' dollars, an organization's data and ability to show its impact are key to creating confidence in and respect for the organization's ability to best steward its donated resources.

REFERENCES & RESOURCES

Bob Woodruff Foundation, Quantifying and Addressing Veterans' Needs (June 2022), https://bobwoodrufffoundation.org/wp-content/uploads/2022/06/BWF_2022_LPSAT_VeteransNeeds_Final_v2.pdf



Find a collection of great resources here to help your organization reach its maximum potential.

[More Local Partner Resources](#)

Many tools are available to help an organization manage its data, including case management software, customer relationship management (CRM) software, referral/lead platforms, databases, spreadsheets, and word processors. Each of those tools has benefits and disadvantages. For example, strengths of a particular data tool could include the number of users, the ability to pull reports together for visualization, integration with other back-end systems, financial performance, and ease of tracking referrals or measuring outcomes. Disadvantages of a tool could include cost (both for initial implementation and for annual subscriptions), the need for extensive knowledge to operate and manage data records, lack of ability to customize the tool, and accessibility for an organization's staff or community partners.

The organizations in the Bob Woodruff Foundation's (BWF's) Got Your 6 Network of community-based partnerships use a variety of tools to manage their data needs. The Got Your 6 (GY6) partners have told BWF they consider a number of factors when choosing a data tool, such as cost (both initial and ongoing), ease of access for staff and volunteers, and ability to customize forms and fields, and ability to generate a variety of reports. Some GY6 partners have made improvements to existing tools, but others have realized that they needed a new option because their previous software was no longer meeting their changing needs. In 2021, 24 percent of local partners were using case management software or CRM software to manage their data, 25 percent were using a database, 24 percent were using spreadsheets (such as Microsoft Excel or Google Sheets), and 15 percent were using a word processor (such as Microsoft Word or Google Docs). The remaining 12 percent of local partners were not using a data management tool to track the veterans they serve.

The Bob Woodruff Foundation continues to encourage community-based partnerships to expand their data standards and improve the means by which they collect and manage data. BWF has seen a steady increase in community partners' data sophistication, but more remains to be done.



GOALS FOR THE FUTURE: Finding the Best Data Tool to Meet Your Organization's Needs

When selecting a data tool, community-based partnerships should think about the best interests of their organizations and the purposes for collecting data. Here are some questions to consider:

Purpose of the Data Tool

- What do we need the tool to do for our organization?
- How is this tool beneficial to our organization and mission, and will it improve the nature of our work and programs?
- Can the tool incorporate our organization's key performance indicators (KPIs)?
- Do the features of the system meet the needs of our work (such as funders' requirements, customizable data fields and reports, and access for staff members and users)?

Collaborative Context

- Will the organization be using this tool in a collaborative setting? If so, how many partner organizations need access?
- Does the partnership include organizations that must comply with the Health Insurance Portability and Accountability Act (HIPAA)?
- Do members of the partnership understand the benefits and value of collecting and tracking shared data?
- How can members of the partnership use the system effectively when working with the same client?

Compliance Issues

- What internal and external security standards govern the tool's use (for example, is the tool HIPAA-compliant without requiring any effort or additional cost on the part of our organization)?
- Does the data tool support permissions-based access to control who can use the tool?

Cost

- How many licenses are necessary to fully meet the needs of our organization and its community partners?
- What is the initial cost to implement the tool in our organization?
- What will the ongoing cost of the tool be (based on a yearly fee, the number of licenses, features, etc.)?
- Does our organization or partnership have funding for this data tool, or do we need to find additional financial support?

Staffing Requirements

- What expertise is required to set up and maintain the tool?
- How much time and competence are required for data entry?
- How much time and competence are required to generate reports?
- Are training and ongoing education necessary to use the tool proficiently?
- Does the vendor provide ongoing technical assistance?

Features of the Data Tool

- Can the tool easily receive and track referrals to and from our organization?
- Will the tool allow us to track outcomes for individual clients?
- What features for generating reports appeal to our organization?
- Will the generated reports benefit the organization?
- Does the tool include a map or list of resources?
- Is the tool secure enough to store sensitive client-related documents appropriately (such as documents related to HIPAA compliance, documents covered by attorney-client privilege, or other confidential information)?
- What additional features does our organization or partnership need from the data tool?
- Can the tool be customized to meet our organization's specific needs?

Implementation

- How much time will it take to introduce the data tool and change our organization's behavior to adopt the tool?
- What is the integration process to incorporate existing client information into the data tool?

Other Considerations

- Is the data tool mobile-enabled, so it can work on cell phones and tablets?
- What hardware is necessary to operate the tool?

These questions provide a strong starting point for an organization to determine the right data tool for itself or its community-based partnership. The Bob Woodruff Foundation provides research, webinars, and other programming to empower community-based partnerships in the GY6 Network.