REPORTING BEST PRACTICES
FROM OLD-SCHOOL TO MODERN REPORTING
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REPORTING
BEST PRACTICES

As a nonprofit, you want to be focused on delivering mission to your constituents, not on reporting. However, reporting on the work you do is critical for understanding the outcomes of your efforts, as well as for telling the story of those outcomes to funders. The fact of the matter is that reporting isn’t going away, yet so many organizations continue to struggle to capture, interpret, and utilize meaningful data. All these woes are caused by reporting the 'Old Way'. We want to make these paint points a thing of the past.

We believe that the path to making data matter starts with reporting best practices. Utilizing best practices will set your organization up to have a wealth of information at your fingertips. Reporting the 'Modern Way' allows your organization’s leadership to set and achieve goals, increase productivity, and inform decisions.

What’s even better is that when your organization tracks important data over time, you will have an easier time painting a picture of your mission’s effectiveness and how the work you are doing is impacting the people you serve.

This eBook is meant to help you identify common mistakes many nonprofits are making when it comes to reporting, as well as to give you a set of reporting best practices that you can institute in your organization. Let’s dive in!
PART I: THE 'OLD' WAY
COMMON REPORTING MISTAKES TO AVOID
USING THE WRONG TOOLS

PAIN POINT: TIME CONSUMING PROCESS

Many organizations rely on manual, time consuming processes to gather and input their data. Manual processes include excel spreadsheets, Google Documents, or even putting pen to paper. These methods require a lot of manpower, time, and resources to maintain - which many nonprofits simply don’t have.

SOLUTION: BUILT-IN REPORTING ABILITIES

By just swapping to a case management solution with built-in reporting abilities, you can solve many of the problems associated with using the wrong tools. Many organizations are moving away from manual processes and working this software into their strategies.
REINVENTING THE WHEEL

PAIN POINT: REBUILDING FROM SCRATCH

Often, when a report is needed, organizations dedicate countless hours and resources generating just one data set. Then they move on and forget about it until it comes up again. And then the team is back to recreating that report from scratch.

SOLUTION: REPORT TEMPLATES

There’s no need to reinvent the wheel. With case management software you can build and save report templates for future use. This speeds up the process of reporting, and creates more consistency in reports over time.
THE WILD, WILD WEST OF DATA

PAIN POINT: ERROR ALERT

Manual entry processes are also error prone, which puts data integrity at risk. Manual processes rely on different people to get information and can quickly become a game of ‘telephone’. The more people involved, the higher the risk for error. And if your data is inaccurate or sloppy, your reporting loses meaning and value.

SOLUTION: DATA VALIDATION

To improve data quality, limit input values to a specific pick-list or required characteristics as often as possible. For example, provide a pick-list of states instead of using a free-form field and where a free-form field is most appropriate, require specific value traits, such as all email addresses including the “@” sign.
WHO'S ON FIRST

PAIN POINT: DATA ERROR FIXES
When data or reporting errors do occur, manual processes make them difficult, or even impossible, to catch, immediately compromising data integrity. Investing time in manual audits will reduce the effectiveness of an organization (especially smaller nonprofits that rely heavily on volunteers).

SOLUTION: AUTOMATED USER AUDITS
Systems designed for multiple users often provide user audits, a virtual breadcrumb trail of what each user has done and when. In Apricot, admin users can easily see which users modified a report, constituent record and more. This makes finding the root of errors quick and aids in identifying staff training opportunities.
PART II: THE MODERN WAY
EFFECTIVE REPORTING EVERY TIME
Knowing and utilizing best practices with data and your selected software and reporting is crucial to maintaining the integrity of critical data. Before you begin your data reporting, it’s best to approach the process with a plan.

BE STRATEGIC WITH YOUR REPORTING

What are your organization’s goals? What data points does your organization require to reach that goal? Having an end goal in mind is the first step in the reporting process. If your organization doesn’t know where it’s going, it will never get there.

Once you know your organization’s goals – it’s easy to implement them into a case management software. You’ll be able to build inputs and track client and service data in real-time. Tracking this data as you go will make it much easier to run reports when you need them (and when you don’t!).
BE CONSISTENT IN YOUR REPORTS

Consistency is key for a functional organization. The same goes for reporting. Nonprofit leadership teams are tasked with determining what data they want to track and who they want to track it. Along with that, they also need to determine when reports should be delivered. Ensure there is a routine in place for your team. Writing basic guidelines reduces the number of inquiries that will need to be ‘passed up the ladder.’

Utilizing a case management tool that offer standardized pre-built forms and configurations also facilitates consistent reporting. If your team is inputting data daily, you’ll be able to run reports whenever you need to. Having real-time results will allow your organization to realign more often and cross compare reports should any issues arise.

SIMPLIFY THE DATA BEING COLLECTED

Many organizations want to track everything that happens within their walls and out in the community. This, however, might not be the most efficient way to collect the data that actually matters. While it may seem like a good idea to capture a lot of information just in case, more often than not much of the data being collected is not utilized and therefore only creates inefficiencies. Be purposeful about collecting data that aligns with your end goal to will ensure consistent and expedited reports.

Case management software, like Social Solutions’ Apricot Software, offer out-of-the-box modules inclusive of best practices in data collection and reporting based on over fifteen years of experience. These modules provide clear direction on the right data points to collect depending on program areas and/or compliance requirements.
COORDINATE WITH TEAM MEMBERS TO ENSURE CONSISTENCY OF DATA

When multiple people are involved in report building, it's important to be able to get the same measure of data, at the same point of time, from the same team member. To do this, coordination is key. So, assigning tasks to your specific team members and communicating what they should be reporting on and when they should deliver results helps ensure consistency.

However, sharing data in insecure environments exposes nonprofits to confidentiality issues. Case management software provides a secure platform inclusive of security protocols and settings limiting access to users based on permissions and roles. The database stays secure, the data stays consistent, and any vulnerable client data stays safe - no matter how many users your organization may have.

SET MILESTONES

After determining your end goal, set milestones or 'mini-goals' that will guide your grand mission. You can't summit Everest in one day, and good milestones will make the overall data trek manageable. Setting milestone goals such as service output, client intake, and public outreach will go a long way. Organizations that use reports as a roadmap for achievement in the short and long term have better success.

Delivering reports on your milestone dates is a breeze with a case management tool. Apricot Social Solutions' comprehensive case management solution, can visualize many sets of data, which makes it simple to see what's working and what's not. Milestone dates can become more frequent, since the time to understand the data is cut down by a variety of reporting options.
In order to preserve the integrity of the reporting agent itself, it’s important to have a complete record of how the database is set up and any reporting requirements that your organization may have. Ideally, these instructions would be retained where only approved team members can edit it but any team member could view it. This ensures that information can be used if your database administrator is absent or moves on from the organization. If this information is not available, any reporting practices could easily be lost and best practices not be maintained.

Some features in case management software can archive any organizational data so it doesn’t completely fall out of the system. Audit reports will help determine who’s changed what inside the system, and reports can be exported for storage on your local systems (and with SaaS software like Apricot they’re always available in the cloud!)

Incorporating best practices into reporting initiatives will ease the startup and transition of an organization that is new to reporting. By using these, along with investing in case management software, your nonprofit will gain a head start through a comprehensive understanding of your operations.

REASSESS AND REEVALUATE INTERNAL REPORTING PRACTICES

Even when following a best practice plan, it’s important to remember to reevaluate. What’s effective now within your organization may change in the future. It’s essential for nonprofit organizations to conduct periodic evaluations to gauge success. This also means ‘checking back in’ with nonprofit reporting trends. This way, reporting procedures will never fall behind the learning curve and organizational data will continuously be handled in the best way possible.

As you discover what’s most important for your organization, templates and forms can be quickly edited to align with your organization’s ever changing strategy. Gone are the days of intensive spreadsheet updates and literally paper-trails. With case management software as the backbone of data entry and reporting, your organization can focus on what’s important while maximizing your impact.
IMPLEMENT BEST PRACTICES WITH CASE MANAGEMENT SOFTWARE

There is a strong need for nonprofit organizations to incorporate best practices into their reporting efforts. Aligning your data collection with your mission goals enables the organization a more comprehensive and end-to-end view of overall operations.

Apricot, the comprehensive nonprofit software by Social Solutions, provides security and stability to any organization looking to deliver their mission with actionable data. Apricot allows nonprofits (like yours!) to become data-driven in their approach to decision making, program assessment, and service options for new and existing clients.

With the adoption of best practices and the investment of case management software, your nonprofit organization can become truly data-driven. Being data driven leads to more awareness of operations, better treatment for clients, and a more effective mission.

To learn more about how your unique nonprofit can track and communicate challenges and successes with Social Solutions’ Apricot Nonprofit Software, visit www.socialsolutions.com.