Data collection systems for monitoring and reporting:
A reflection note from a shared learning workshop

March 2024

Background

This reflection note draws on insights from a community of practice session with organisations delivering employment support to young people. The session covered approaches to identifying and implementing databases to support monitoring and reporting. The session was led by [Superhighways](#) and content is shared here with its kind permission.

The [Youth Futures Foundation](#) funded this session as part of an evaluation capacity-building project delivered in partnership by [Ipsos](#) and [NPC.](#) The project involved the provision of evaluation capacity building support to organisations that help young people to access training and employment. It is one among several learning outputs from the project, which aim to capture and share knowledge and insights from the initiative.

The note summarises key discussion points from the session covering: what is a database, the benefits of using one for monitoring and reporting, options when choosing a new database and things to think about during implementation. Links to additional resources are also provided.

1.   What is a database?

- A database is a computerised system that makes it easy to search, select and store information.

- With an online database, data isn't stored locally on a single computer or office network but is accessible via the internet on a computer, laptop, tablet or phone.

2. What are the benefits of using an online database?

Investing in an online database for storing and managing your data has some benefits over using spreadsheets:

Drawbacks of using spreadsheets	Benefits of an online database
o Hard to keep data neat. o Linking data between sheets requires formulas or queries. o Difficult to protect the format when you have multiple users. o No audit trail – you can't see who's changed what. o Easy to make mistakes. o Difficult to partition data so users see just their own data. o It's easy to end up with multiple spreadsheets as people download copies/create their own.	o Single source of truth – everyone always updates and uses data in one place. o Easy to cross reference and report on data. o Secure & backed up. o Accessible from anywhere (on anything!). o Less repetitive manual data entry. o Audit trail – see who's done what & when. o Access permissions – make sure people only see what they need to see.

3.   What are the options when choosing a new database?

Database type	Pros	Cons	Examples
1. The big players – Comprehensive all-rounders	Comprehensive, organisation-wide database, catering for a large portion of your organisation's needs. Free or low-cost entry level.	Complex systems. Although often "free" they will require extensive paid-for support from a specialist provider if you don't have the skills in-house. They tend to require a larger organisational shift with extensive training before they fulfil their potential.	Salesforce Microsoft Dynamics Civi CRM
2. Build your own (no code / low code)	Full flexibility to build a bespoke database that suits your unique ways of working and data collection / analysis needs. Drag and drop tools mean you don't need to be a computer programmer to create a database. Prices are relatively low because you're doing all the work, but it's possible to get simple databases up and running in hours.	Sizeable learning curve and you'll need skills, time and commitment in-house to build these yourself, or pay for support. You may also be building something from scratch when something already exists that will fulfil 80% of your needs	Airtable Knack Zoho Creator
3. Off the shelf all-rounder - Customise and configure	Great understanding of the charity sector - you'll feel well understood when describing your needs. There's no middle person - you'll be dealing directly with the database provider themselves.	Some user interfaces might be dated, so there could be limitations like not being great on mobile devices. There's likely to be greater upfront costs for these systems, but this isn't necessarily negative as you'll benefit from hands on knowledgeable support and functionality upgrades.	Simply Connect Lamplight Views Charity Log Plinth Better Impact Aide CRM Upshot
Off the shelf impact focussed - Customise and configure	The tight focus of these systems means they are quicker to implement and easier to learn how to use. Vendors can provide knowledgeable, focused support.	You may need a larger system down the line, so consider how future-proofed your decision is.	Evide Impact Tracker TP Tracker

4.   How do you choose and implement a new database?

A seven-stage process, summarised below, will help you choose and implement a database that suits your specific needs. Each of the stages has practical templates to help you on your way, which you can access on Datawise London's website.

50% of work			10% of work		40% of work	
1. Scope	**2. Plan**	**3. Specify**	**4. Select**	**5. Prepare**	**6. Test & train**	**7. Implement**
Taking stock - what have we currently got?	**How are we going to approach It?**	**What do we need the database to do?**	**Which database should we choose?**	**Get everything ready**	**Put it to the test**	**Use It Everyday**
Time & budget Attitude towards change Technical skills Data stakeholders Software & equipment audit Outcome & evaluation framework	Appoint Project lead Timeline Staff & Volunteer buy-in	Mapping data to outcomes Reporting needs User requirements	Explore database options Map how the new database will fit in with your current systems	Database customisation Data clean up and migration User support materials New working processes	Testing & fine tuning User training	Full roll-out Ongoing user support Database maintenance Continuous improvement

5.   Where can you get further help?

Further support can be accessed via the following links:

- [Datawise London's blog on choosing a CRM](#)
  This includes templates for each step of the process and explanations of how to use them

- [Datawise London](#)
  Complete the web form to request one-to-one help from Datawise (London charities only)

- [Superhighways](#)
  For data and digital training (London charities only)

- [CITA](#) - IT Help for Charities
  Cita have a mentoring programme to help charities wanting to rethink their systems

- [IT for Charities Database guide](#)

- [Data Orchard](#)
  A list of CRM systems and providers for not-for-profits

- [Data Collective](#)
  Advice and resources on data use in the social sector