



Successful Data Management Practices for Non-profits

Feb 9th 2018

WWW.NSDTECH.CA | WWW.CARMIS.CA

PRESENTERS: SUMEGHA GUPTA and NITIN GUPTA

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Who We Are?

WE ARE THE DOERS

NSD Tech is a fast growing I.T. organization with a combined total industry experience of more than 20 years.

Our vision is to provide best quality out of the box development & management solutions. Our expertise runs in both web and desktop based applications.

Based in Winnipeg, Manitoba we are a strong advocate of women in tech, mentoring our youth and I.T. doing more for non-profits.



I.T. DOING
MORE FOR
NON-PROFITS



Presenter's Profiles

Meet our presenters

SUMEGHA GUPTA

Sumegha Gupta: A B.Eng. and M.B.A. graduate with honors roll, Sumegha has fourteen (14) years experience in information technology industry working with clients like International Labor Organization (ILO), Peace village, Amnesty International (Winnipeg Chapter), MIIC Welcome Place, Red road lodge. She also currently sits on board of SEED Winnipeg.

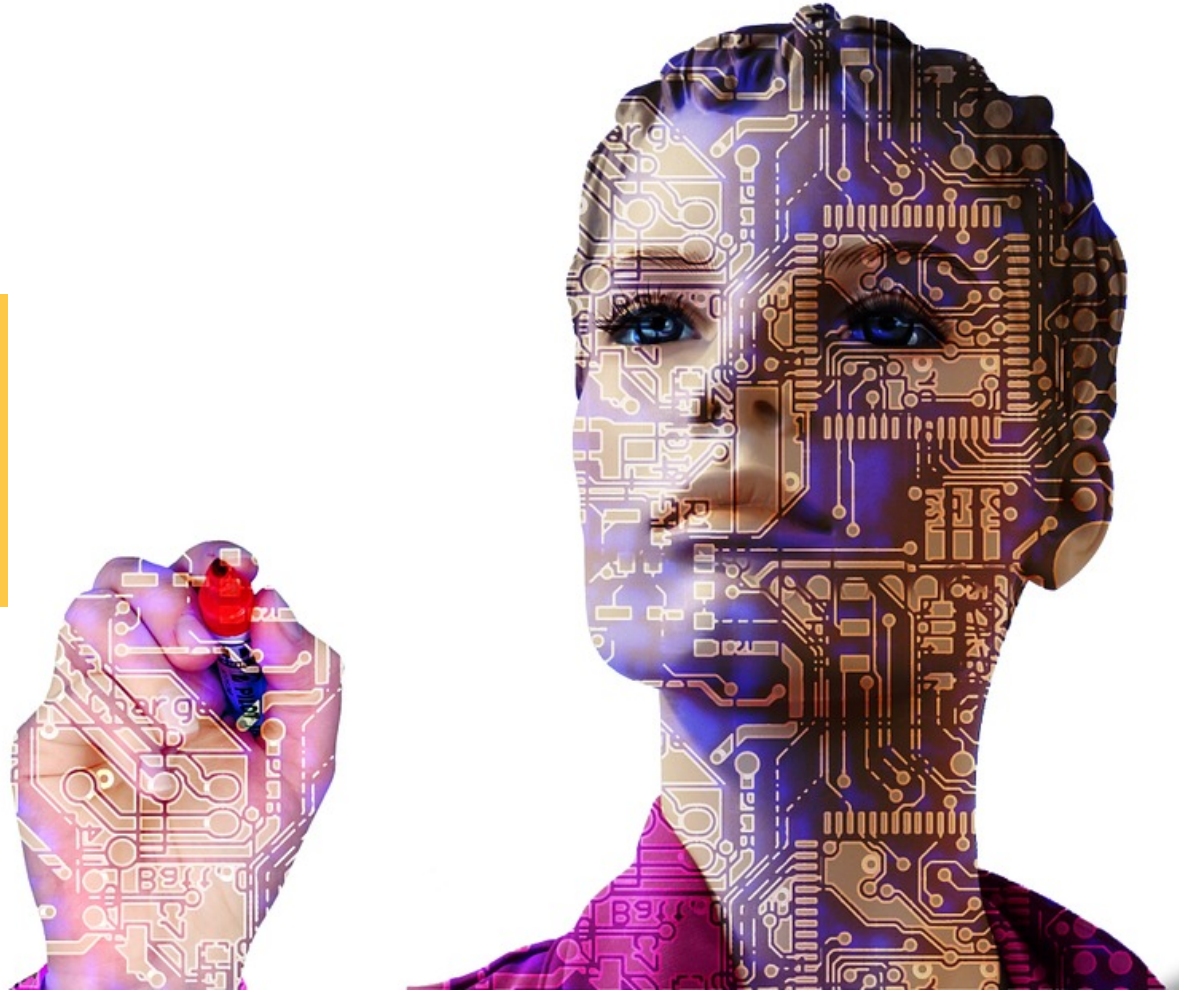


Nitin is a project management professional with M.B.A. degree and various IT certifications like PMI project management professional, Prosci change manager and Prince2 project practitioner. Nitin has a sixteen (16) years experience implementing software applications in both private and public sector. Nitin is currently working with Manitoba eHealth (Winnipeg Regional Health Authority) in project management, coordination and analysis.

NITIN GUPTA

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WHAT IS DATA?



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Data can be any character, text, words, number, pictures, sound, or video and when used as is do not provide any context or meaning.





IF DATA

does not provide context
why it is **important?**

Garbage In Garbage Out

Information is based on data, data is the focus!



Are you asking for Data or for the Information?



Since information is outcome it can be processed again, but data is the focal point.



Computers typically read data, but it is not necessarily something that a computer actually understands. Quality of recorded data determines how a computer/human can turn that data into useful information.

Most people believe that the terms "data" and "information" are interchangeable and mean the same thing. However, there is a distinct difference between the two words.

The background of the slide is a blurred, artistic photograph of several people in a meeting or collaborative workspace. They appear to be engaged in discussion or working on a project. The image is rendered in a soft, painterly style with muted colors.

Activity Alert

*Let's identify some of
the most common
DATA MANAGEMENT CHALLENGES
you face in your day to day
activities.*

*Or If you are a management staff,
what challenges you face when you
ask for
data or information from
your staff/colleagues.*

Please Take 5 Minutes And Write Down Max 2 Challenges Faced On The Cue Card Provided

No Standard Format To Enter Data



Enter Date 1/2/2018

Is it 1st Feb 2018 or 2nd Jan 2018?

WHAT WE CAN DO TO FIX THIS PROBLEM?

Use a standard format across entire agency or data collection tool, so that everyone knows what this translates to.

Enter Date: 1-Feb-2018
(dd-mmm-yyyy)



Challenge 2

History Copies Of Same Data

Client Cases 2017.xls
Client Cases 2017 NEW.xls
Client Cases 2017 Backup.xls
Client Cases 2017 OLD.xls

- Which of these is the true copy?
- Accessibility issues for other staff

☐ Name

-  Client Cases 2017 2017-12-15.xlsx
-  Client Cases 2017 2017-12-10.xlsx
-  Client Cases 2017 2017-12-01.xlsx

Client Cases 2017 2017-12-15.xls

(yyyy-mm-dd : simplifies file sorting by name)



No Central Location To Store Data



Data on staff's computer

- Staff on vacation, other staff needs access
- Collaboration by multiple staff

WHAT WE CAN DO TO FIX THIS PROBLEM?

Create shared folder on a central computer or server to store files, and map the shared folder in computers of all staff.

`\\CENTRAL\SHARED\`

S:\ drive on computer maps to the shared network folder

System Crashed, Where Is The Backup?



Hard disk crashed or computer died

How do you get your data back?

STEPS WE CAN UNDERTAKE TO MINIMIZE THIS RISK?

- ✓ Backup all computers at-least weekly using tools like Windows Backup and Restore or similar options.
- ✓ Maintain critical data backups outside agency, like on-cloud.

Challenge 5

Sensitive Data And Responsibility Sharing



SIN#, Foss ID, UCI#, Name + Date of birth + Postal code

- Can uniquely identify an individual.
- Can lead to various privacy issues.

STEPS WE CAN UNDERTAKE TO MITIGATE RISKS?

- ✓ Use secured means like (internal email only) to share client's demographic and/or sensitive information, mark email subject as "Sensitive Data".
- ✓ Develop a habit to shred all unaccounted papers.
- ✓ Use encryption in digital files if possible, for example add passwords to PDFs, Excels and other file formats.



Inconsistent Reporting



New Clients in 2017 as per staff A - 450
New Clients in 2017 as per staff B - 410

- Increased data reconciliation effort
- Possible delay in reporting to funders

STEPS WE CAN TAKE TO FIX THIS PROBLEM?

- ✓ Maintain central data for all staff – avoid local copies.
- ✓ Build and test reports using pre-defined formulas instead of manual effort.
- ✓ Perform frequent data quality checks

No Garbage Data => Most accurate reporting



it'sfixed

www.carmis.ca | www.nsdtech.ca



Successful Data Management Practices

Introducing

CARMIS





CLIENTS AND REFUGEES MANAGEMENT INFORMATION SYSTEM

CARMIS is the solution to challenges faced by refugees and immigration sector. It is a complete **case management solution** with **artificial intelligence**. It allow agencies to comply with IRCC (iCARE) and other funder reporting requirements without changing their existing processes. CARMIS, case management software is a powerful solution which is available as desktop application as well as web base solution.

90% **MORE**
EFFICIENCY
AND DATA ACCURACY
FOR AGENCIES WHO HAVE
CARMIS AS CMS



CENTRALIZED
SINGLE DATA
ENTRY



DATA SHARING
ACROSS ALL
DEPARTMENTS



HISTORICAL
CASE
INFORMATION

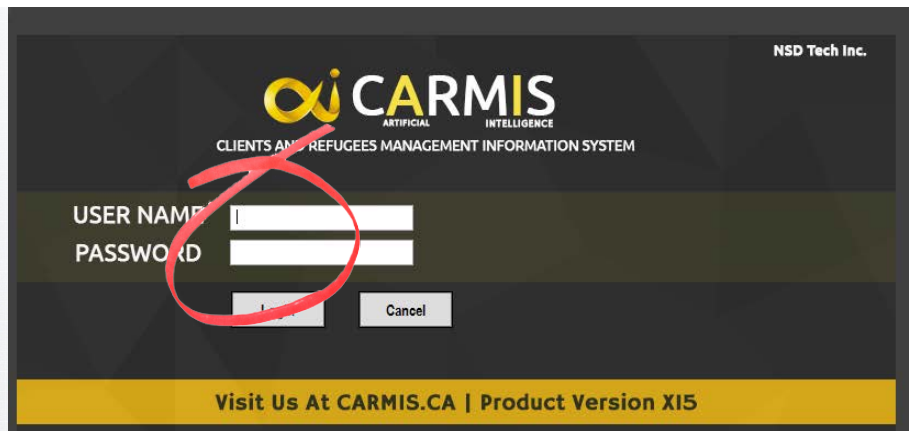


FORECASTING
AND
SCHEDULING



BUILT IN PRIVACY
AUDIT TRACKING
AND LOGGING

SIMPLE . COMPREHENSIVE . COLLABORATIVE



Product Features

- Can be accessed either through web or desktop.
- User/password for every user; based on their access rights.
- User can use any desktop to access their work, no need to move users if they move departments or rooms.
- Keeps user activity log for audit and system browse history.

235-Volunteers Applications (VOLWEBSITE) Soft Search

File Number

Application Date

Application Status

Volunteer Services

Application Date: 07 Feb 2018 Application Status: Submitted **V0001**

PERSONAL INFORMATION


Name: John Doe Date of Birth: 20 Oct 1998
Address: 10, Milky way drive Postal Code: R3T5G7
Email: john@gmail.com Gender: Female
Phone: 204-111-8989 Work:
Driver's License: No
Arrive in Canada: 12 Jul 2014

PROFESSIONAL INFORMATION

Employed: Yes Employer: ABC Corp Designation: Early Educator
Student: Yes Institution: Yale University Course: Faculty of Education
Volunteering as part of: Interest In Helping People

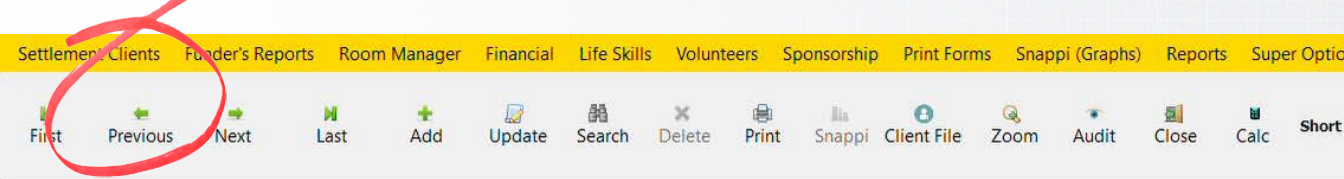
VOLUNTEERING INTERESTS AND AVAILABILITY

Hear about us: Google
Commitment: 3 months

 Print Volunteer Application

Product Features

1. Color code to show mandatory fields
2. Option to add multiple data entries against a field in one go.
3. Print information in PDF, Excel or word format right away.



25-Step 1: Prearrival & Assignment (MASTER) Select Action

File Number **C1391** ? **MAHMOOD** Family Of 8

Country Of Birth Syria

Country Of Residence Togo Republic Of

High Need No

MHSC Number 76629

6 Week Follow Up Date 05/12/2017

File Status Active

Arrival Information **Counsellor Assignment** **File Members (Profile)**

First Point of Contact -

Planned Arrival Date 24/10/2017 **Time Of Arrival** : **Flight Number**

CIC Appointment Date **CIC Appointment Time** :

Pre Arrival Remarks TRANSFER FROM SKSKATOON.

Print Pickup Notice E-Mail Pickup Notice

Product Features

1. Single toolbar for all forms and data, for effective data browsing.
2. Access client data as family or individual
3. One screen to see all the information, no data duplication.

Product Features

1. One click data generation for iCARE uploads.
2. Yellow & Red line shows errors in data even before data gets uploaded to IRCC, hence reducing error rate up to 98%
3. Easy peasy happy funders.

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Questions And Answers

Thank you very much for attending the seminar.
We are now open for Q & A.

