THE SURVIVAL GUIDE
For the Solo Analyst

Real-world lessons from a
decade of nonprofit data work

THE Data Coach

INTRODUCTION

It's tough being the only data person at the nonprofit organization. I know; I did it for over 10 years!

This guide includes lessons I've learned, things I wish I had done, and advice I'd give to anyone who is the sole data guru on their team or for the whole organization. I hope this guide helps you navigate the unique challenges of your role and find ways not just to survive, but to thrive as a key member of your nonprofit.

-Lindsay Morgia

The Data Coach

PROTECTING YOUR TIME

When you're the only data person on your team or in your organization, some days all you're doing is treading water as your inbox overflows with data requests. **Navigating these demands can feel incredibly overwhelming on top of your other job responsibilities,** especially if time management and prioritization are already challenging for you. Here are some tips for making these requests more manageable for you while providing clarity for everyone else:

1 **Create a data request process that works for you and communicate the process to the people around you.**

In my experience, one of the benefits of being a solo analyst was the high level of autonomy. Take advantage of that independence and create your own process for data requests that details how to request information and the lead time required to complete the request. It makes everyone's lives easier if everyone knows the rules.

2 Talk to your team about what types of requests should be prioritized.

Agreeing on what to prioritize as a team can give you some leverage and help you clearly communicate why a request or project can't be completed right away. This discussion can be especially helpful if there are a few departments (or people) that are particularly demanding!

3 Know your busy seasons and communicate them to your colleagues.

There may be times when your capacity is limited due to time-sensitive projects, such as annual reports, grant reporting, or grant applications. Let your colleagues know in advance when you'll have less time for external requests so that everyone can plan accordingly.

4 Stand firm in your professional boundaries.

The processes you create for things like data requests from other departments are there to protect your time and theirs. There is very rarely such a thing as a data-related emergency!

DEVELOPING COMMUNICATION SKILLS

Your success as an analyst is directly tied to your communication skills. **To be effective, you must be able to translate the technical aspects of your work into easily understandable and actionable information** for your colleagues, community members, and stakeholders. These are my top tips for practicing your communication skills:

Conference suggestions:

- **Association of Fundraising Professionals**
- **American Evaluation Association**
- **Nonprofit Technology Conference**
- **State nonprofit associations**

1 Take advantage of opportunities to present information.

This can be as simple as sharing data at a department meeting, an all-staff meeting, or even at professional conferences. There are many opportunities for practice if you can find and advocate for them.

2 Understand your audiences.

The way you present data to your team might differ from that at a task force or board meeting, since your team members have more background on the data you present. Think carefully about what the audience already knows about your data and what you might need to fill in to help guide their understanding.

3 Be open to questions.

Sometimes, we data nerds can get a little possessive of our data and a little defensive of our work (I know I was!). It makes sense, though - we're working so hard to manage so much, and we can be sensitive to questions that might trigger our imposter syndrome. However, addressing questions with patience and grace is essential to improving our communication abilities.

4 Always ask for feedback!

The presentation probably isn't going to be perfect the first time, or the second, or the third, and that's okay! Frequent feedback, especially from your non-data-oriented colleagues, is essential to help you build your data translation skills.

PRIORITIZING PROFESSIONAL DEVELOPMENT

Nonprofit organizations often don't do a great job of providing professional development for their employees, which means **you will need to advocate for your own professional growth**. The good news is that there are a ton of resources available to help you grow your expertise, and many nonprofits have some funds available to cover costs for workshops, webinars, and association memberships. Here are my suggestions for getting started on your professional development journey:

① YouTube is a great learning resource. Seriously.

If you're stuck with an Excel problem or a database dead end, there are a ton of channels that offer step-by-step guides, tips, and tricks for overcoming common data challenges. Also, the database or CRM you use probably has its own YouTube channel that explains database features, troubleshoots issues, and offers creative ideas for using your systems in ways you may not have considered before.

2 ## Join a professional organization that aligns with your interests and goals.

Joining a professional organization gives you access to networking and learning opportunities, such as conferences and webinars, as well as leadership opportunities, like serving on a committee. I've learned a lot and made great connections from joining [NTEN](#) and my local evaluation association. You can also consider professional associations based on your areas of interest, like [the American Public Health Association](#) or the [Association for Public Policy and Management](#).

3 ## Network, network, network

I know, I don't like it either! But with so many virtual and in-person options available, there's at least one event out there that won't push you too far out of your comfort zone. **One of my biggest professional regrets is not connecting with other analysts I could email or call if I was stuck on something or needed a sounding board to solve a problem**. What we do can be lonely work, and having even one person who understands what you do can make life much easier!

CELEBRATING SUCCESS!

In the nonprofit sector, we often have to define success for ourselves in the short and long term. **Celebrate your wins however you define them:**

⭐ Battled an Excel formula and won? Amazing!

⭐ Didn't lose your cool when your boss asked you to change a report for the 400th time? Incredible!

⭐ Did that report you worked on two years ago set a path in place for an advocacy victory? You did that!

Sometimes, it may feel like our analytical contributions are getting lost in the mix. That's why identifying what you've done and your role in it can go a long way in not only giving you a morale boost when you need it, but also reminding you that the crazy days (and sometimes nights) are worth it. You are contributing to the mission. You are a vital part of the community.

Keep up the good work!

For more tips, tricks, and resources, check out our blog or follow our socials!

THE Data Coach

the-data-coach.com/resources

Linked in

linkedin.com/in/lmorgia

Instagram

@thedatacoach303

THE Data Coach

The Data Coach helps nonprofits better organize, analyze, and use their data to achieve their missions.

Hi, I'm Lindsay Morgia, M.P.P., M.S.!

I spent 15 years as an analyst in the nonprofit and public sectors before founding The Data Coach. During that time, I realized my passion for teaching nonprofits proper data collection and analysis, applying it to key organizational decisions. I excel at working collaboratively to make data accessible and less intimidating to staff without a data background.

Now, I leverage these skills to help nonprofits and fellow consultants build capacity for insightful research and drive community impact.
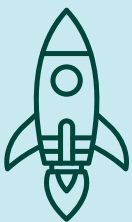
Is your data working for you?

Use this link or the QR code to take our **free Data Health Assessment** to evaluate your current data practices and get ideas for improving your data quality.

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