

Managing data on a budget



Small and start-up social enterprises often have tight budgets. Here are some practical tips from the data learning community on how you can improve your data management, even if you don't have time or money for major changes.

Make the most of what you already have

Before you invest in new tools, spend some time reflecting on what is really underpinning frustrations or challenges with data, and what small steps might help.

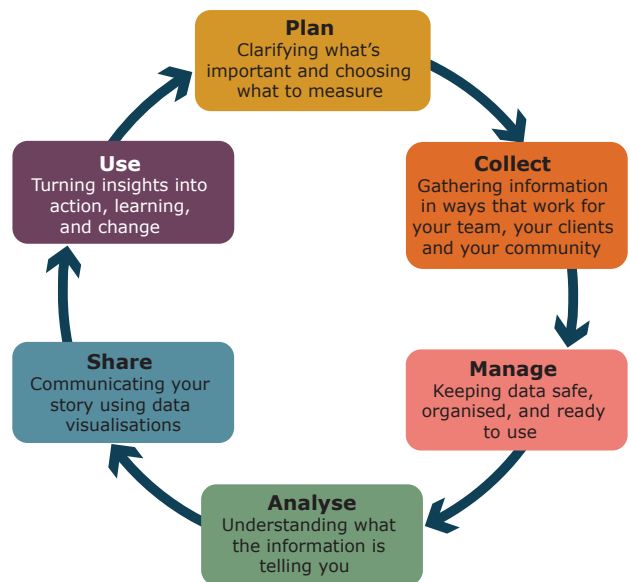
For example, you might be looking to invest in a new data management system because entering data directly into a spreadsheet (such as Excel or Google Sheets) can be fiddly and error prone. But if you have a spreadsheet program, you probably also have a form program (such as Microsoft Forms or Google Forms). Setting up a data entry form can make a big difference to both data quality and the data entry experience, at no extra cost. You may still need to upgrade eventually, but it will reduce frustration in the short term.

Watch out for hidden costs!

When considering a new tool, watch out for free deals that expire, limits on the number of records or users that you can have, or a pricing structure that will quickly become expensive if your social enterprise grows. Remember that cheap or free tools still come with costs. The license might be free, but you also need to think about costs associated with set-up, maintenance and training.

Budget for the whole data cycle

The data cycle is a way of understanding the journey that data takes through your social enterprise. You get the best value from your investment in data when you make it through the full cycle, when you have data to share with others and use for decision making.



So when you're thinking about investing in data, zoom out and consider the full data cycle. For example, you might be excited about designing an impact measurement framework, but have you budgeted for how you'll implement that framework? You might be keen to start a survey, but have you thought about the time required to analyse and use that data?

You don't have to do it all at once, but you do want to make sure you're strategic in how you use your limited resources for the best results.



Sharing internally can help with data quality and culture

Data can be like a jigsaw puzzle: it's hard to understand the bigger picture when you're looking at individual puzzle pieces. If staff are responsible for collecting data or completing data entry tasks, but never see the data in a collated form, such as a report or dashboard, they don't see the bigger picture that they're contributing to. Adding a data reflection session to an existing team meeting can be a low-cost step towards building a team culture that values data, helping to reduce frustration with tasks that might otherwise seem meaningless.

Review your tools regularly

Keep a list of all the software and tools your social enterprise uses, and review it regularly to check:

- Are you actively using everything you're paying for?
- Are you on the right plan for your needs?
- Are all subscribed users still active and necessary?
- Did you check whether social enterprise, non-profit or community discounts are available?
- Have you checked the latest feature updates? (You might find that new features reduce your need for another tool.)

Keep learning!

The data world is changing fast and it can be overwhelming. Focus on small, manageable steps. For example, you might set aside 20 minutes a week to explore a new feature or test a small improvement. Over time, these small habits can help you make better use of the tools you already have and build confidence about what to do next.

Start a good conversation about data with funders

Grant funding can be amazing for supporting a social enterprise, especially in the challenging start-up phase. But it's important to check what kind of data and reporting requirements are associated with the grant. In the data learning community, we heard stories of onerous data collection requirements from funders. One social enterprise had even handed back a grant once they realised what would be involved. But there were good news stories too: we heard about funders who were willing to modify requirements, extend deadlines, or even provide support for data capability building. The biggest tip was that it's always worth building the relationship, and having an honest, constructive conversation about what it takes to collect and manage the data that's being requested.

