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An introduction to using data in business development

Dr James Bowles

Innovation Fellow

University of Birmingham



About you

- Where are you from and what is your role?
- What are your hopes and dreams (if any!) for using data in your organisation?

About me



UNIVERSITY OF
BIRMINGHAM

Innovation Fellow

- Making research applicable
- Developing tools and sharing knowledge
- Running workshops



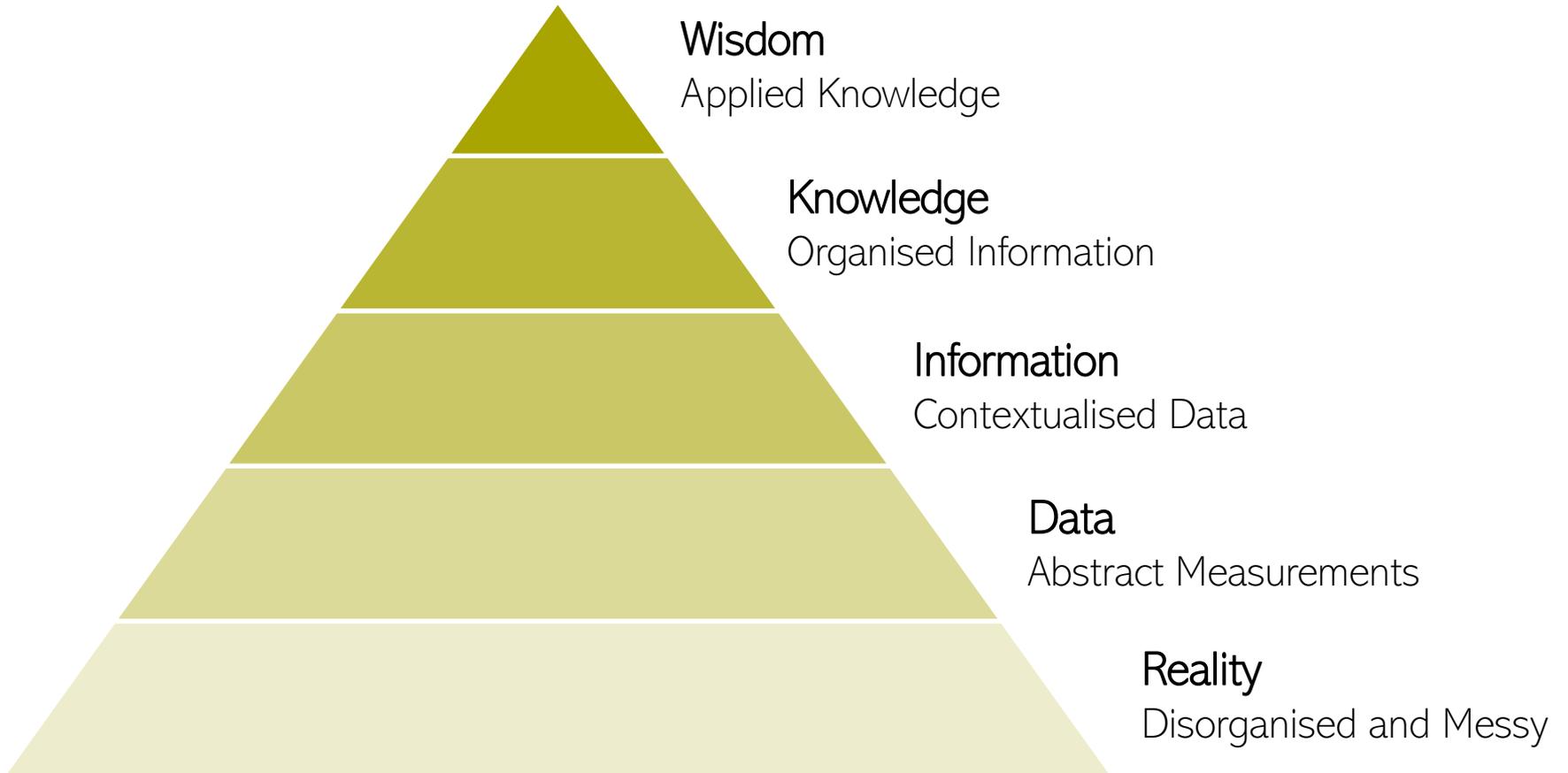
Consultant

- Research and evaluation
- Strategic development
- Data literacy and data strategies

About today

1. Data fundamentals
2. Being good data stewards
3. Using external data
4. Beginning to think more strategically about using data in business development

The data pyramid



Quantitative

- Based on measurement
- Typically numerical
- Showing how many, how much, how often

Qualitative

- Based on description
- Typically text-based
- Showing a perspective, or opinion

Operational

- Information about your core business processes

Financial

- Both project and organisational

Service User

- Who are your service users?
- What are their characteristics?

Engagement

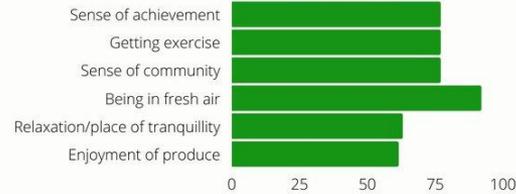
- The extent to which people use your service, or engage with your organisation
- What do people think of the service?

Outcomes

- What short and long term changes take place
- How have people been helped or influenced?



What do you enjoy about the Community Allotment?



"It's nice to have a change of scene since I retired"	"I have neither a garden or balcony at home"
"Giving me a place to be. Getting me out of the house"	"The great people I have met at the allotment"



Reported improved confidence

Saw an improvement in their physical and mental health



Said Covid hasn't changed how they feel about volunteering

"If anything, Covid has given me a sense that even making a small contribution is worthwhile. It's made it easier to see the value in small things."

“ The Community Allotment is a small patch of heaven. In part, this is because of the beauty of its plants, flowers, fruit and the pond but also the wonderful sense of community.

The feeling of being in a safe, welcoming place made up of delightful and diverse individuals. Those who have created it, and continue to lead it, can be rightfully proud of this fabulous achievement.

”

Source: [Ollie Carrington's compilation of charity data visualisations – a brilliant source of inspiration!](#)

Thinking about your own data...?

What do we collect?	What format is it in?	Where do we store it?	How do we use it?	Who do we share it with?	How long do we plan to keep it for?	Who is responsible for managing it?

Data audit template

When thinking about data use, consider...

- How you will **use** the data you collect, and how it links to your **strategic aims**
- Who you can use it to **communicate** with, and for what **purpose**
- How the data is **collected**, what it is *really* telling you, and what **limitations** it may have
- If your data is **structured**, and if so, does it **make sense** to other people
- Who could be **affected** by you using data in this way

UK GDPR and Data Protection Act 2018

Register with the Information Commissioner's Office (ICO) if you [process personal information](#).

'[Personal information](#)' means any detail about a living individual that can be used on its own, or with other data, to identify them.

[Processing](#) is broad, and means:

- Collecting
- Recording
- Using
- Erasing etc...

[ICO Hub for SMEs](#)

At least one lawful basis for processing data must apply:

- (a) **Consent:** the individual has given clear consent for you to process their personal data for a specific purpose.
- (b) **Contract:** the processing is necessary for a contract you have with the individual, or because they have asked you to take specific steps before entering into a contract.
- (c) **Legal obligation:** the processing is necessary for you to comply with the law (not including contractual obligations).
- (d) **Vital interests:** the processing is necessary to protect someone's life.
- (e) **Public task:** the processing is necessary for you to perform a task in the public interest or for your official functions, and the task or function has a clear basis in law.
- (f) **Legitimate interests:** legitimate interests can be your own interests or the interests of third parties. They can include commercial interests, individual interests or broader societal benefits.

Plus one more condition for processing special category data, which is any data which reveals or infers:

- personal data revealing **racial or ethnic origin**;
- personal data revealing **political opinions**;
- personal data revealing **religious or philosophical beliefs**;
- personal data revealing **trade union membership**;
- genetic data**;
- biometric data** (where used for identification purposes);
- data concerning **health**;
- data concerning a person's **sex life**; and
- data concerning a person's **sexual orientation**.

ICO Special Category data

Controller v Processor

A **data controller** determines the purposes and means of the processing of personal data.

A **processor** engages in personal data processing on behalf of the controller.

If you exercise overall control, you are the data controller.

Documenting your approach to data protection

1 – Data Protection Policy (internal) / Privacy Notice (external)

2 – Record of processing activities

3 – Data sharing agreement

4 – Data protection impact assessment

[Greater Manchester Combined Authority GDPR compliance guide for small charities](#)

1 - Data Protection Policy (internal) / Privacy Notice (external)

- The name of your group or organisation and the person responsible for data protection.
- Why you hold the personal data and what you do with it.
- Where you got the data from (e.g. from the individuals when they joined)
- If you share the data with anyone and how you do this
- How long you keep the data for
- How people can request access to, or correction or deletion of, their data (inc. key contact details)
- How to complain to the ICO
- Whether you make any automated decisions or do profiling based on the data you hold

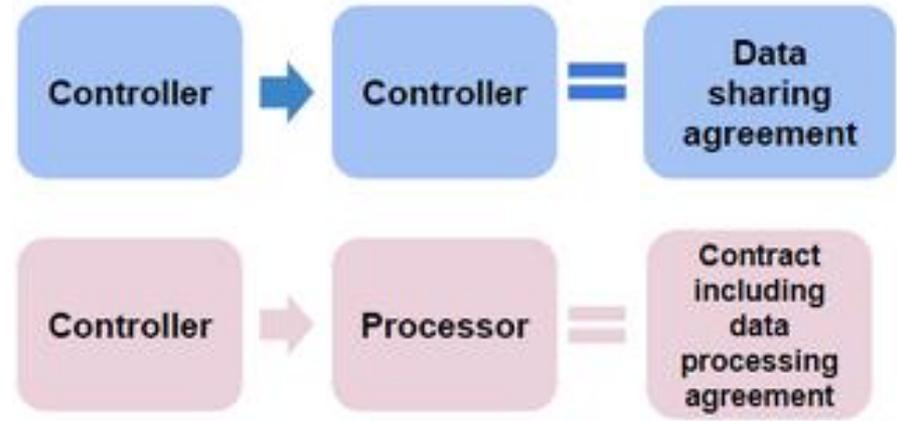
2 - Record of processing activities

What do we collect?	What format is it in?	Where do we store it?	How do we use it?	What is our lawful basis for processing it?	Who do we share it with?	How long do we plan to keep it for?	Who is responsible for managing it?

Data audit template

3 - Data sharing agreement

- A contract between two parties to share or pool data
- You still need a lawful basis for processing the data
- Key points are: who, what, why
- It might be worth familiarising yourself with a [Draft Data Sharing Agreement](#)



Source: NHSX

4 - Data protection impact assessment (DPIA)

- Required for any processing that is likely to result in a **high risk of harm to individuals** (and therefore your own reputation)
- Good practice, but especially necessary if you're processing special category data

Your DPIA must:

- describe the nature, scope, context and purposes of the processing;
- assess necessity, proportionality and compliance measures;
- identify and assess risks to individuals; and
- identify any additional measures to mitigate those risks.

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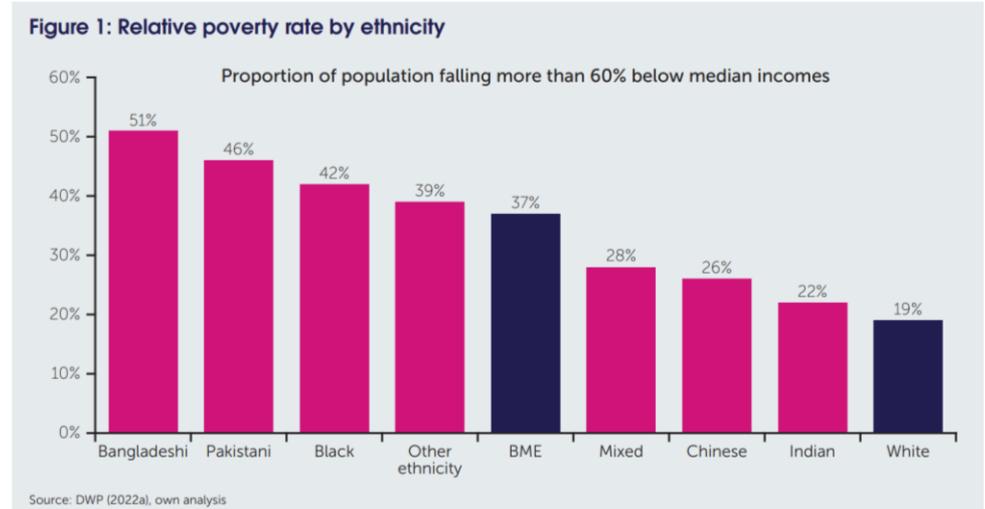
3 – Data sharing agreement

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What are we using data for?

- Demonstrate your expertise and authority
- Show that you understand the context in which you work and the change you are trying to bring about
- Learn more about your organisation
- Breaks up text
- Our brains like visual descriptions!



Source: Runnymede Trust

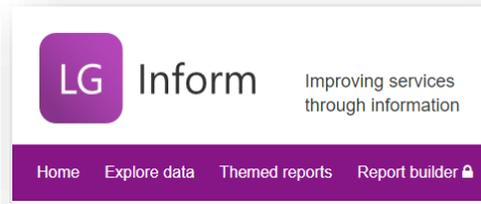
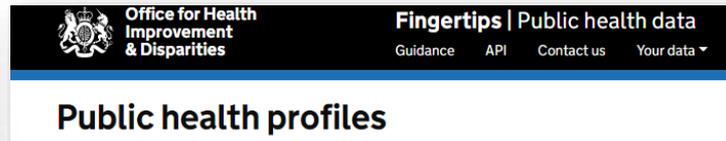
Mapping your service users

Demonstrating why 'where' matters

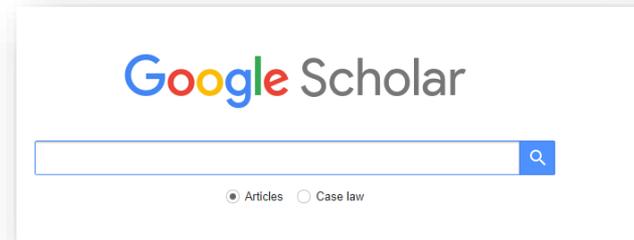
Community Lens – map postcodes against IMD

Autogeomapper – aggregate postcodes by ward or Local Authority

Demonstrating the wider context



Using expert evidence



Linking up strategy, data use, and communication...

What is your strategic question or aim ?	What internal data can you use?	What external data can you use?	How will you communicate this? What story are you trying to tell?
To bid for a LA contract to provide free fitness classes to people from low-income backgrounds. This links directly to charitable aims.	Data on past service users held on CRM; qualitative feedback from previous participants.	Mapping service user postcodes on Community Lens ; understanding the make up of the local authority from HBAI data on Stat Xplore	Both ward level and LA level maps and analysis of both where activities have successfully been delivered in the past in addition to where there is clear need. Accompanied with qualitative descriptions of benefits to service users.

For the workshop on the [redacted]...

With the business model canvas in mind, we will be constructing compelling 'data stories' to use in funding bids, project reports, annual reports, presentations, social media communication...

If you can, think about...

1. What data do you hold? (A quick go at the data audit template)
Feel free to email me if you are after specific external data...
2. Which stakeholders are you trying to influence?
3. What 'shift' would you like to bring about by communicating with them?

- REDACTED

j.bowles.2@bham.ac.uk



[j_bowles](https://twitter.com/j_bowles)

www.jamesjbowles.com