

Balancing Macro and Micro Data

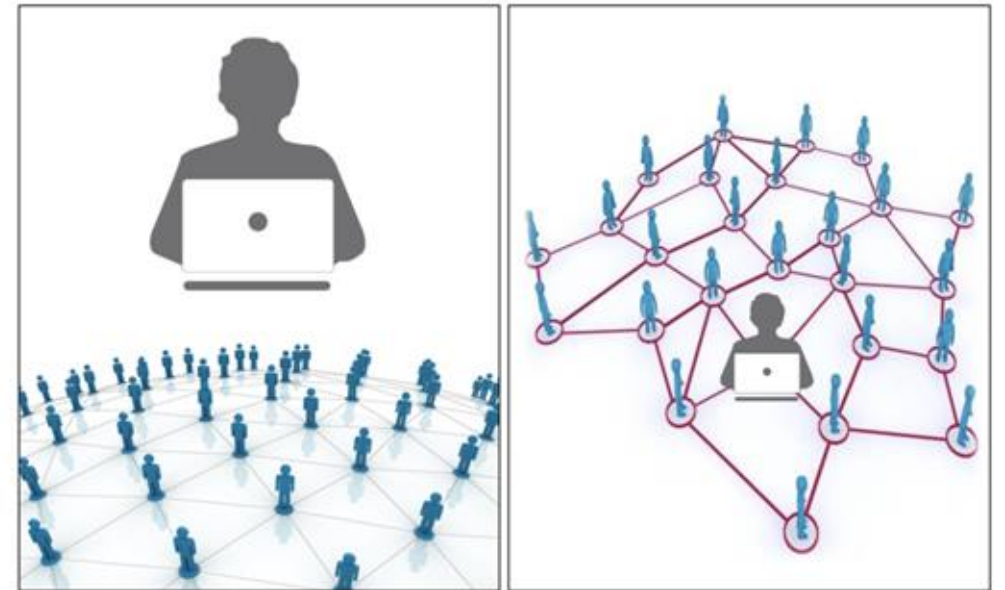
Module 7
Using Data and Evidence in Proposals

Learning Objectives

- Distinguish between macro (broad) and micro (local/agency-specific) data
- Learn strategies for integrating large-scale demographics with agency data
- Understand best practices for verifying accuracy and reliability
- Develop communication techniques that resonate with funders

Macro vs. Micro Data Overview

- **Macro Data**
 - Demographic and economic indicators with broader coverage
- **Micro Data**
 - Administrative or primary data
 - Agency-specific records, client or community feedback
- **Why Both Matter**
 - Complements broad trends with direct experience
- **Finding the Right Balance**
 - Contextualizing local needs within wider patterns



(a) Macro-level approach

(b) Micro-level approach

Integrating Broad Demographic Data

- Identify relevant macro indicators
 - May include poverty rates, educational attainment, etc...
- Join data using geographical alignment
 - Match the scope of your service area
 - County, MSA, ZIP code, census tracts
- Use credible sources
 - Government agencies, reputable nonprofits or research institutions
- Focus on trends over time or space
 - Show how the issue has evolved

Agency-Specific Metrics

- Client demographics
 - Age, location, gender, income level, service usage
- Program outcomes
 - Success rates, completion metrics, satisfaction scores
- Financial data
 - Budget allocations, revenue, cost per client served
- Quality feedback
 - Testimonials, focus groups, surveys



Ensuring Data Accuracy and Reliability

- Cross-verify sources
 - Compare multiple data sets for consistency
- Assess timeliness
 - Use the most recent data available
- Check sample sizes
 - Especially for micro data (ensure representation)
- Account for data limitations
 - Acknowledge margins of error, missing values

Communicating Data Effectively to Funders

- Use clear visuals
 - Graphs, infographics, charts
- Focus on key takeaways rather than every data point
 - Visualize key results
- Tailor language to the funder's interests or priorities
 - Different funders may require different presentations
- Include a concise narrative
 - Clearly tie data to your program goals



Potential Pitfalls in Merging Macro & Micro Data

- Cherry-picking statistics that confirm your biases
- Inconsistent units or scales
 - Different spatial units (county vs. neighborhood data), different time periods
- Overgeneralizing from a small sample
- Ignoring context
 - Local nuances or cultural factors
- Loss of specificity through reliance of macro data

Best Practices for Synergy

- Use macro data to frame the broader problem
- Follow with micro data to demonstrate your direct impact
- Consistent formatting
 - Same currency units, population intervals, etc.
- Tell a cohesive story
 - Problem, local context, solution, and projected outcomes



Key Takeaways & Next Steps

- Correctly balancing macro and micro data enhances credibility
- Accuracy and transparency are crucial
- Communicate effectively with visuals and clear narratives
- Audit your current data sources and refine your approach