

AT A GLANCE

DATA 101 for VCFSE's (13th November 2024, in-person, Witton Lodge Community Association, Birmingham)

Please see below the session summary of notes from the November 2024 Social Economy FORUM meeting focused on 'DATA 101 for VCFSE's'.

OUR HOSTS | This session opportunity was kindly hosted by [Witton Lodge Community Association](#) at Witton Lodge Road, Perry Common, Birmingham B23 5JD.

OUR EXPERT INSIGHTS | The invited experts for this DATA 101 session are gratefully acknowledged for their time and contribution as we explored the **3C's of Data**:

- **Capture:** [Nate Sheridan](#), Founder of [Citizen Click CIC](#)
- **Compliance:** [George Chawawa](#), Director of Data Protection Backroom Ltd
- **Community:** [Iram Fardus](#), Head of Business Development & Performance at [Witton Lodge Community Association](#)

OUR FACILITATOR | [Sallie Ryan](#), [BSSEC CIC](#)

INTRODUCTION & CONTEXT

The context was set by the parameters of the **3C's of Data** discussion categories:

- **Capture:** WHAT, WHERE & HOW of capturing data, do we always know what data is being collected and how it's being used.
- **Compliance:** LEGAL REQUIREMENTS and our obligations to curate, store, and care responsibly for the data we hold.
- **Community:** HOW DATA MAKES A DIFFERENCE when we work with our communities and make informed business decisions.

Firstly, we briefly discussed in broad terms the importance of data across our business functions such as:

- HR and personnel.
- Customer record keeping.
- Stats, evaluation, and analysis for management reporting.
- Impact measurement and reporting.
- Informed decision-making across business functions: marketing, resource planning, funding applications, contract management, strategic direction and Board governance.

According to the [INFORMATION COMMISSIONER'S OFFICE](#), Data is the lifeblood of any modern business.

Without data, you'd probably struggle to fulfil a contract or complete an order, so it makes sense to [put security measures in place](#) to protect it.

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A short interactive session from the facilitator posed the question of *'in the last week, have you given someone your data, consciously or unconsciously'* which warmed up the session thinking!

DATA ITEM	% IN THE ROOM
In a shop ie. Being asked for email to for your receipt	20%
Buying something online ie. Amazon or shop/item pop up	80%
Social media ie. Like or discount code	80%
Newsletter sign up ie. Business or organisation of interest	40%
Work email ie. Shared by colleagues or external connection(s)	30%
Photo permission ie. GDPR at an event (like today!)	100%
Petition or campaign ie. Putting your name to a cause or vote	-

The discussion led to a recognition that we often aren't conscious of the data information we hand over, who it's been given to, what they will do with it, how it will be stored and for how long. The room reflected on, if this is how we consider our personal/work data, how confusing data can be for those in our communities who may not be confident in digital skills, have social/mental health challenges and/or learning disabilities or not have English as a first language.

Conclusion: we should be mindful of our community of benefit and how we communicate use of data in our engagement with them. Transparency, good data housekeeping, and compliance was considered important in this regard.

From a business perspective, the general conversation turned to how we use data in our organisations, our data responsibility towards both staff and our customers/clients as we reflected on the most recent UK Business Data Survey.

In the [DEPARTMENT FOR SCIENCE, INNOVATION & TECHNOLOGY](#) conducted [UK Business Data Survey 2024](#):

21% of businesses in 2024, that handled digitised data, analysed data to generate new insights and knowledge.

Conclusion: there was considerable surprise that *only 21% of organisations* use data to inform their strategy, new product or service development, and/or decision-making. Interestingly as a sector reflection, a significant number of the larger VCFSE organisations in the room confirmed they do regularly conduct internal audits and external surveys with the results being reviewed by leadership teams.

Collectively, it was acknowledged that data is not perfect and can be 'cut how you want it' but the legal imperative around data means we, as VCFSE organisations, need to be informed about Data.

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To quote American theorist and economist, [Edwards Deming](#), "Without data, you're just another person with an opinion."

INSIGHTS SPEAKER 1:

WHAT, WHERE & HOW of capturing data, do we always know what data is being collected and how it's being used.

Nate Sheridan | Citizen Click CIC

Why is data important and how do we use it?

- Critically, data helps us shape our offer - the products and services we provide to our customers, our client's, and our community of benefit. *Think back to that 21% stat from UK Business Data Survey 2024!*
- Data supports our businesses to move forwards and be sustainable. *Think informed strategic decision-making at a leadership and Board level as well as heads of function.*
- Our annual impact statements are founded on good data (and good storytelling) and enable our funding bids leading to scale and growth outcomes for our enterprises. *Think 'payment by results' (PBR) contracts where robust data is business critical for financial resilience.*

What is considered as 'data'?

- Everything!!
- Staff records: date of birth, nationality, contact details, bank account, next of kin, etc.
- Customer records: protected characteristics, medical records, economic background, social demographics, etc.
- Organisational records: memberships, payment details, website tracking cookies, social media platform contacts.
- Other data capture consideration might include CC TV as an example of thinking laterally about data capture.

Where is data captured?

- Data capture for Advice & Guidance services is prevalent in VCFSE sector ie. Services accessed, job clubs, energy advice, counselling support, etc.
- Data needs to be 'of legitimate interest'.
- It must be clear that data is being gathered, how it will be stored, who will have access to it, how it will be used, and how to request data to be removed.

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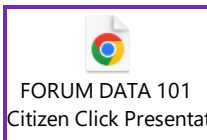
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- Data is often stored on a [Customer Relationship Management](#) (CRM) system to maintain robust and compliant records for customers/clients, suppliers, contractors, consultants, partners, etc.

Where might data be unexpectedly captured?

- Free wifi registration.
- Website visitor analytics tracking.
- Cookies tracking.
- Notification settings (mobiles especially).
- Increase in Artificial Intelligence (AI) data adoption.

Session resource (double click on PDF icon):



INSIGHTS SPEAKER 2:

WHAT are the legal requirements, and **WHAT** might be considered 'best practice'.

[George Chawawa](#) | [Data Protection Backroom Ltd](#)

Trust is a key factor in our data handling for both internal and external contacts.

- Data 'trust' is often implicit, rather than explicit, when dealing with organisations.
- People 'invest' (emotionally, financially, practically) when they engage with our organisations and share often highly personal and/or sensitive data.
- Trust is hard won but very easily lost – think DATA SECURITY and DATA BREACH every time.
- Reputational damage from a data breach has considerable repercussions for any business.
- Organisations have a responsibility to be TRANSPARENT about their data capture, data use, data sharing (particularly third-party data sharing).

Some of the legal requirements for gathering and using personal data.

- DATA GATHERING must have a legitimate interest for data captured and only used for that stated purpose.
 - › Example: a recruitment applicant email cannot be added to an organisation's newsletter mailing list unless express permission has been given for dual use.
- DATA BREACH of significance must be reported within 72 hours to the Information Commissioner's Office. [Report a Data Breach](#).

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- The [Personal Data Accuracy principle](#):
 - › Personal data must be accurate and kept up to date where necessary. You are therefore required to take every reasonable step to ensure that inaccurate personal data, in respect to the purposes for which they are processed, are either rectified or erased without delay.
- DATA CONSENT must be:
 - › Given freely (OPT IN required).
 - › Informed, clear and unambiguous.
 - › Of '[legitimate interest](#)'.
- Anyone (a Data Subject) can ask to see the data that your organisation holds about them and can request their data is removed in accordance with your own Data Policy.

Data minimisation.

You should collect only the minimum amount of individuals' data that you require to deliver a particular service question. That data collected must be relevant, adequate, and must be limited to what is necessary for the purposes for which you are going to use it for. [Resource here](#).

Data considerations.

- Data can inform our business decisions.
- Data Subjects should be informed of how their data will be used, or express permission should data use be changed.
- Anonymising data gives more flexibility in data use ie. Case studies but Data Subjects should still be considered as identifying factors may be included such as where someone (ie. a victim of domestic abuse) lives/picture outside their home that may identify them unintentionally.

Staff and policies.

- Flexible working and working from home arrangements should be updated to consider data implications of new style working provisions.
 - › Internet security of equipment and business systems.
 - › Passing footfall access to data ie. Laptops screens left open, visitors, online meetings (visible and audible), shared screen meetings (reflected sensitive information on nearby screens).
 - › Use a password secure vault platform for logins.
- Have robust policies such as Data Policy and Social Media Policy to protect both the business and the individual(s).

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- Conduct regular Risk Assessments covering such situations as data capture, storage, use, licences, breach, and business risk.
- Consider staff GDPR training as a business essential.

INSIGHTS SPEAKER 3:

HOW we can use data to support our communities.

Iram Fardus | Witton Lodge Community Association (WLCA)

Community input to creating local Hub.

- Local people approached [WLCA](#) with a desire for a safe, welcoming local space they could gather in, socialise in, and do activities.
- It was the COMMUNITY VOICE that identified the building and catalysed WLCA to enter discussions with Birmingham City Council.
- The Hub became the first Birmingham City Council community asset transfer.
- Looking forwards, WLCA wanted to replicate the work in the Perry Common area to other localities and used the data gathered to inform their growth plans.
- WLCA data is often captured through listening as well as written records.
- Data informs the services design across the WLCA organisation as well as identifying the gaps in services that can be opportunities to improve.
- Partnership working means having to be clear in data sharing parameters and permissions:
 - SERVICE LEVEL AGREEMENTS are key documentation and can allow for anonymised data to be used/shared.
 - Named DATA PROCESSOR is explicit.
 - Named DATA CONTROLLER is explicit.
- Collectively, partnership working needs to be clear on what the level of decision-making/power is held and by whom when it comes to enacting decisions.
- Working in partnership means being able to acknowledge who is the best person to lead a project or activity – not always the same as the 'anchor organisation'.
- Partnerships can enable capacity-building and ensure aspects such as compliance, quality, and security are covered across a project.

Community engagement is, and always has been, key to WLCA.

2024 has seen WLCA further empowering engagement within their communities and it is very much felt that the community enables WLCA.

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The WLCA approach is to understand what the key priorities are for the community by engaging with them, work out (using data and local knowledge) how to support them, and then enable local people in the community to take the lead.

KEY DATA 101 TAKEAWAY >>>

Treat your data like it's cash!

FEEDBACK & OUTCOMES

"It was great to attend today's session and thank you for making me feel so welcome in uncharted (but wholly inspirational) territories!"

"I actually am buzzing with the warmth of the people in the room and with knowledge."

"It was a really great meeting on such an important topic, especially for social enterprises who don't have the big teams behind them to help."

"Thank you for such an enjoyable session today. I thoroughly enjoyed it. I had done a thorough prep for my presentation BUT experience taught me that one must learn to respond effectively to what's happening in the moment."

"I do really enjoy these events and I feel that there is a lot that can be gained when people gather to share knowledge and experiences at forums such as you run."

"On Monday 11th November 2024, I ran a GDPR training session for a group of Better Pathways members of Staff. It would not have taken place, but for me coming along to your event held at the Better Pathways premises in July 2024."



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We are also grateful to Iram and the [Witton Lodge Community Association team](#) for the personal tour of their community-led [Witton Lakes Eco Hub](#).

RESOURCES & LINKS

- <https://ico.org.uk/for-organisations/advice-for-small-organisations/whats-new/blogs/15-things-all-small-businesses-need-to-know-about-data-protection/>
- <https://ico.org.uk/for-organisations/advice-for-small-organisations/>
- <https://ico.org.uk/for-organisations/>
- <https://ico.org.uk/for-the-public/>
- <https://www.gov.uk/government/statistics/uk-business-data-survey-2024/uk-business-data-survey-2024>
- <https://www.enterpriseresearch.ac.uk/wp-content/uploads/2024/01/The-State-of-Small-Business-Britain-2023-Web-version.pdf>
- https://www.socialenterprise.org.uk/app/uploads/2022/10/https_www.socialenterprise.org_uk_app_uploads_2022_06_SEUK-State-of-Social-Enterprise-West-Midlands-2022.pdf
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