

THE BUSINESS OF A LOCAL DATA INTERMEDIARY

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BUSINESS MODEL OVERVIEW

Like all mission-driven organizations, local data intermediaries share the challenge of financial sustainability and communicating the value of their work to external stakeholders and current and potential funders. As such, leaders of local data intermediaries must understand and communicate not only the value of their work, but the mechanisms by which they can sustain their work financially. Borrowing from origins in the private sector, a business model is a way to organize operations and understand one's clients, revenue, and value, and the streams and products that connect them. Business models are typically defined in strategic documents that should be revised and refined over time as an organization's activities, capacity, and reputation develop, and the local funding environment evolves. With over 20 years' experience, National Neighborhood Indicator Partnership (NNIP) Partners bring a wealth of knowledge on how to develop business models capable of sustaining data intermediary work over time. Coordinated by the Urban Institute, NNIP consists of independent organizations in 32 cities that have a shared mission to help community stakeholders use neighborhood data for better decisionmaking, with a focus on assisting organizations and residents in low-income communities. NNIP Partners are skilled in organizing and transforming data and have developed neighborhood indicators across many topics that are kept to date.

A local data intermediary acts as the mediator between data and local stakeholders—nonprofit organizations, governments, foundations, and residents. To empower communities to use data for decision-making, local data intermediaries conduct activities in three main domains: assemble, transform, and maintain data; disseminate information and apply the data to achieve impact; and use data to strengthen civic capacity and governance. While NNIP Partners share a common goal and many common activities, the organizations vary widely in design – from size to institutional form to local context. These factors should be considered before and during a business planning process.

This brief collects the business experience of NNIP Partners, providing guidance in thinking about a business model for organizations that are just starting, or that need to revisit their business models based on changing landscapes, such as new partners, activities, and technology. The brief was created to highlight some best practices and to address a need in the field. This

¹ The core activities of local data intermediaries are described in chapter 2 of NNIP's Guide to Starting a Local Data intermediary. See appendix 3.

document is organized in three sections, broadly covering (1) revenue streams, (2) pricing, and (3) proposal development. Each section contains background information and key business model considerations for local data intermediaries based on the experiences and best practices emerging from the NNIP network.

Groups who are interested in revamping or adjusting their current business models, or are starting one from scratch, are encouraged to review the accompanying brief "A Tool for Organizational Development: The Business Model Canvas" for facilitation tips and resources on the process of developing or refining a business model using the Business Model Canvas. NNIP's Guide to Starting a Local Data Intermediary has further discussion on strategies for communicating value, fundraising, and organizational sustainability.

BUILDING A DIVERSIFIED REVENUE BASE FOR SUSTAINABILITY

Local data intermediaries serve various sectors and often receive funding from a mix of clients, such as city or county governments, local nonprofits, philanthropy, and even the private sector. This diversity of clients and funding sources is important for local data intermediaries to drive their impact, and is also necessary for long-term sustainability.

NNIP Partners raise revenue through general support and project-support funding from a variety of funders. General support funding is typically more flexible and is designed to support the overall organization and mission, while project-support funding is for targeted activities and deliverables. The results of a 2014 survey, published in "A Picture of NNIP Partner Finances," found that an NNIP data intermediary raised on average more than two-thirds of its revenues by providing various services for a fee, and that general support funds amounted to a smaller share of the total budget (one-third). Despite representing a smaller share of overall budgets, general support resources are highly valuable to NNIP Partners due to the flexibility and ability to fund infrastructure components to support their data repositories and other systems. Nearly all NNIP Partners (93 percent) receive some general support funding. Interestingly, the analysis showed no systematic differences in finances among different types of local NNIP Partner organizations. For example, data intermediaries housed in university centers are not characteristically larger or smaller, or more or less dependent on general support, than those housed in other types of local nonprofits or philanthropic institutions (See Kingsley, Kandris, and Woluchem, 2015 for more details on the survey and its results).

PROJECT-SUPPORT FUNDING

Project-support funding, or payment for specific products and services, is the key revenue generator for NNIP Partners, accounting for 67 percent of total budgets on average per the 2014 Partner Survey. NNIP Partners receive project funding from a variety of sources, as detailed on table 1 below.

Table 1. Percent of NNIP Partners Receiving Project-support Funding from Various Funder Types

Funder type	Percent
Local foundations	66
Local and/or state governments	59
National foundations	28
Federal government	28
Universities	24
Commercial organizations	21
Banks	21
United Way	17

Source: Kingsley, Kandris, and Woluchem 2015.

Project-support funding comes in many shapes and sizes and is cultivated through building strong relationships with current and potential clients. While some funding may come directly from local funders – philanthropic, public or private – with which the local data intermediary has built a strong reputation, it may also emerge through relationships in the civic and community spheres. Local data intermediaries may receive direct funding through such sources, or seek opportunities jointly with partners and other community stakeholders. Project support-funding can be one-off projects or represent recurring work through regular updates of data or expansion of scope into different geographic or topical areas.

Project-support funding may be structured as grants or contracts. Grants typically have more flexibility, but might also contain specific terms, deliverables, and reporting as is standard for contract agreements. Contracts usually define a set of tasks and activities under a fee-for-service agreement, which articulates for the client and funder the scope of work, project timeline, deliverables, and fee. Although reputational risk for nonperformance is a more important issue for local data intermediaries, contracts differ by type on whether the contractor or the client bears the risk of a project costing more than anticipated and not generating the

results or deliverables anticipated. Here, we discuss a few of the features of three major contract types: fixed-price, time and materials, and cost reimbursement.

Fixed-price contracts have a set price regardless of whether the costs of the project or deliverables exceed that price. This places the risk for the project on the contractor for delivering on the scope of work even if costs were not well-estimated or something changes and incentivizes controlling costs. Thus, fixed-price contracts work best where the scope of work is very well-defined. Some contractors may have higher fees for fixed-price contracts to compensate for this increased risk. In **cost-reimbursement** contracts, such as cost-plus fixed-fee, contractors are reimbursed for allowable costs and predefined fee. In a **time and materials** contract, a contractor gets reimbursed for costs for materials and for labor hours at defined hourly rates that include overhead and administrative expenses, in addition to wages. Both contract types shift the risk to the client. In these cases, risk can be managed by establishing a "not to exceed" cap that can be raised by agreement with the client should there be substantive changes to scope or work or unforeseen circumstance in the project implementation. Cost-reimbursement contracts do provide some incentive for contractors to contain costs.² Fees in contracts are not necessarily considered profits but can cover costs that are not reimbursable.

Contracts also may take the form of a **Master Service Agreement (MSA)**, which sets up a broader agreement under which future services will be provided. These contracts are more flexible than a simple contract because the project tasks and deliverables are not negotiated up front. MSAs may include a total price ceiling for all work under the MSA or have no price specified. In practice, NNIP Partners have negotiated the total amount at the start of the contract, in which the dollar amount represents a specific number of labor hours. As the contract period (often a year) progresses, the Partner spends against the contract by writing up scopes of work for the funder(s), that articulate the planned work and estimated level of effort. As such, MSAs need mutual agreement on plans for execution. An advantage of these agreements is that all contract language can be addressed up front, rather than repeatedly for each scope of work. Under MSAs, NNIP Partners will report to the funder through monthly updates detailing work approved and completed to date, and the balance of the contract.

² See for example https://fcw.com/articles/2011/07/12/time-and-material-cost-reimbursement-contracts-dan-gordon.aspx and

http://www.acq.osd.mil/dpap/ccap/cc/jcchb/Files/Topical/Contract_Type_Comparison_Table/resources/contract_type_table.docx

NNIP Partners have had a mixed experienced with MSAs. It is important to note that these contracts may be designed as "use it or lose it," meaning the local data intermediary may or may not receive the full contract amount if all the hours are not used. NNIP Partners note that this exposes them to more risk than traditional contracts, because they are essentially on-call to do the work at any point during the contract period, and need to be able to make staff available for the work, but the task request may never arrive. Due to this dilemma, it is important to understand the capacity and interest of the funder to develop tasks (or its willingness to be receptive to NNIP Partner-driven ideas) under the MSA. If this is a newer funder for the local data intermediary, or there is concern about the ability to scope out tasks, NNIP Partners suggest keeping these agreements small relative to the overall organizational budget for the intermediary to avoid a situation in which the staff is over- or under-utilized. However, mutual expectations between funder and local data intermediaries about timelines and staff availability can be communicated and built in into MSA to mitigate these challenges. For example, the scopes of work could be dependent on staff availability, and "rush" jobs can be priced higher.

NNIP Partners have found MSAs to be increasingly popular with funders, and one partner referred to it as a "research and data-on-demand" model. MSAs have several benefits, including greater flexibility about project work, ability to do multiple smaller projects for the same funder, less administrative time spent managing separate proposals, and larger/recurring funding commitments from key partners. One NNIP Partner who has maintained a MSA with the city government since its founding reflected how the agreement enables them to be nimble and more responsive to client needs and reduces administrative costs. Another NNIP Partner uses MSA agreements differently, as a way to bring in a new funder at a small dollar amount. For this Partner, it is a way to display their data intermediary capacity and potential, particularly to funders who may not understand how to best take advantage of data intermediary services or be ready to commit funding to a larger project. The MSA is viewed as a way to be flexible and showcase the Partner's capacity, to hopefully move towards a larger contract or grant award in the future. However, Partners also stress that it can be difficult to manage the planning or staffing needs at the beginning of the contract because it lacks specific deliverables and due dates.

MSAs can also function more like **blanket agreements**, establishing all the legal terms between the local data intermediary and client without any funding or time commitments. Under these agreements, tasks are requested and Partners respond with specific costs and scopes of work. Partners have found this model advantageous as it limits the administrative work required to do

repeated contracting with the same client. Especially in large institutional settings, such as universities, it may be possible to execute task on the signed blanket agreement without requiring signatures from high-level university administrators, allowing the work to be expedited.

GENERAL SUPPORT FUNDING

In addition to project-support funding, local data intermediaries should seek general support funding. General support funding is commonly used for components of the enterprise that are important to its long-term sustainability, such as responsiveness to local current and emerging issues, engagement with the community through ad-hoc technical assistance and other tools, and communication. In some places, it may be difficult to raise initial general support funds before the value of data intermediary services has been demonstrated. According to the 2014 NNIP Partner Survey of Finances, general support funding represents an average of one-third of organizational revenues, with the shares for the middle half of the group ranging from 17 to 75 percent of organizational budgets. Unlike project-support funding, most partners received general support from only one source (41 percent) or two to three sources (38 percent). General support funding most frequently came from a local foundation or local or state government, although universities, local United Ways, and other nonprofits were also sources of general support funding (Kingsley, Kandris, and Woluchem 2015).

General support funding requires building strong relationships locally, establishing a solid reputation, and clearly communicating value. Raising money to support general operations can be challenging. Many local funders focus on supporting activities that yield direct results—for example, preparing young children for kindergarten or training adults for employment—and offer minimal support for more indirect activities, such as those of a local data intermediary. Therefore, an intermediary will be more likely to obtain general support funding if it articulates the value of the concept and the influence its work can have on the direct outcomes funders seek. It may be helpful to frame the request in terms of investment in a community's information infrastructure (see "Monitoring Impact: Performance Management for Local Data Intermediaries" Cowan and Kingsley 2015, for more on monitoring impact).

OTHER REVENUE STREAMS

While project-support and general support funding are the most common and significant revenue for Partners, other revenue streams, such as membership models, board contributions, and in-kind support are used by NNIP Partners as well.

Under **membership** or **subscription models**, local data intermediaries plan with a client to purchase a certain number of hours per month. One NNIP Partner developed a membership application and applied different membership fees for organizations and individuals. Local organizations pay a set amount based on organization size and receive between four and eight hours of technical assistance in return. Under this model, member organizations also receive a discounted rate for larger projects. In the experience of this NNIP Partner, the membership model was not a major source of funding or contributor to long-term sustainability but did increase buy-in and interest from local nonprofit organizations in the work of the local data intermediary.

At least one NNIP Partner receives annual fixed financial **contributions from board members**, as representatives from their institutions (separate from any personal contributions as individuals). Board members' organizations make contributions to the local data intermediary's operating costs and in turn are entitled to up to 40 hours of work per year and a discount on fee-for-service work, as well as a role in strategic decision-making of the organization. This is important for organizational sustainability as it represents recurring support for operating and other non-project costs.

In addition to the various sources of financial contributions, **in-kind support** is often a very important element of the operating budgets and business models of local data intermediaries. According to the NNIP Partner Survey of Finances, 59 percent of partners are part of a larger parent organization (e.g., a university with an NNIP Partner in one of its research centers) that provides them with one or more forms of in-kind support, with the type and value of that support varying across Partners. Of those in this category, 34 percent receive some free information technology services, 38 percent receive free office space, 24 percent receive some free staff support, and 14 percent receive in-kind support in other forms. University-based data intermediaries had access to significant in-kind contributions such as access to administrative offices for human resources or accounting and/or free/reduced office space. Other NNIP Partners have sought in-kind support from other local organizations, such as communications or public relations firms. Like general support funding, in-kind contributions are often cultivated through local relationships and clear communication of value.

ESTIMATING COST: SCOPING WORK AND ESTABLISHING BILLABLE RATES

To plan for project expenses, local data intermediaries must be skilled in pricing the work, including scoping tasks, estimating work hours, planning for uncertainty, establishing billable rates and direct and indirect cost line items, and ensuring the organization can establish a rainy-day fund of cash reserves. As a long-term goal, an organization's rainy-day fund should be sufficient to cover at three to six months of payroll and organizational costs. Each organization should establish a policy on when and how reserve funds should be used.³ We discuss the remaining aspects of estimating costs in more detail below.

SCOPING WORK

Scoping work – identifying the components necessary to complete a project, such as tasks, labor hours, and materials for a potential client– is an art and a science. Scoping often requires several rounds of iterative development internally, as well as significant back and forth with clients to come to a mutual understanding of tasks, deliverables, and project outcomes. This is an essential skillset to foster among project managers and other staff who develop proposals so that local data intermediaries can ensure they are getting paid sufficiently for work completed and value delivered. To estimate hours or full-time equivalents needed on a given project, NNIP Partners need to consider all components of the project and attempt to assign reasonable staff time to accomplish it. We suggest three activities below that can help a local data intermediary improve their ability to scope work.

Implement a system to track staff time on projects. The core of scoping work well is being able to make an accurate estimate of the level of effort. This is based on a well-informed understanding of how similar tasks have been accomplished in the past. Tracking staff hours over time and historical analyses of project budgeting and actual expenditures are important strategies for improving the ability to scope work precisely over time. Staff need to track their time spent on each project they work on, and in certain cases, on specific tasks within projects. Some NNIP Partners use time-tracking software systems to document hours, while others simply use spreadsheet software (see Appendix 1 for examples of project management and time-tracking software). Despite the consensus that tracking hours at the project-level is important, many

³ For additional guidance on planning for cash reserves, see the National Council of Nonprofits: https://www.councilofnonprofits.org/tools-resources/operating-reserves-nonprofits.

Partners note that this is difficult to accomplish with staff as it can be perceived as unnecessarily burdensome if they do not understand the payoff and are not required as a condition of their employment to track their time in that manner. Tracking staff time is a best practice that will help local data intermediaries manage operations and achieve long-term sustainability. Building the infrastructure for tracking project spending is especially important for larger, more competitive contract awards.

Budget for unplanned circumstances. Despite best efforts to track hours and estimate future projects, NNIP Partners note that they consistently underbudget their projects. Projects often cost more than assumed during the budgeting process. Local data intermediaries must consider potential changes that may impede their ability to execute projects on the timeline and within the budget originally defined. This might be an external factor such as availability of data or community or political circumstances. Internal issues such as analysis challenges or staff turnover may also be a factor. These are hard to budget for but should be discussed in proposals as potential risks. In some cases, it may be feasible to account for risks in the budget, however it is likely easier to add these to contractual agreements as dependencies. One NNIP Partner reflected that they used to consistently underestimate the time required to complete work, such that they now increase their estimates by a set percent to ensure not to undershoot on the project. This Partner and others reflect that it is always preferable to have resources left over, which can cover more in-depth feedback and client review, dissemination, or, if preferred, can be returned or not invoiced to the client.

Manage client expectations on cost and scope of work. Managing client expectations about project goals is a crucial step of scoping work that helps in avoiding scope creep. Local data intermediaries often must work to educate their clients and funders on the technicalities, descriptions, and level of effort required for the project's deliverables. Many Partners report running into problems when a client doesn't fully understand or communicate what they are looking for and then requests significant changes after signing the contract, in the middle of the project, or after the final deliverable. NNIP Partners are increasingly required to be diplomatic, but "tough" when working with clients to ensure that they understand and agree with the price quote and project outcomes, as well as any additional costs required for extra work.

ESTABLISHING BILLABLE RATES

Mission-driven organizations use many different tactics to manage organizational and project budgets and set labor and other cost rates. In establishing hourly rates, it is important to

recognize that (in the absence of significant general support funding), they must cover expenses such as software subscriptions, fringe benefits, overhead costs and all non-billable time including vacation and sick days. Overhead costs are essential costs and are needed for organizations to be effective, as these costs cover management and fundraising tasks, among other functions.⁴ Awards from foundations are often restricted from covering overhead costs, and so it is important to break out to specific categories, such as rent, IT services, equipment, etc. Hourly rates vary widely based on the local context and appetite for the work of a local data intermediary. A local data intermediary will also need to set rates competitive with the local market to attract and retain staff. One Partner reflected that in cities with robust professional services industries, potential clients are less likely to have "shell shock" about the hourly rate. While some NNIP Partners have complex budgeting and proposal templates, many Partners have moved to flat hourly rates that are presented to clients. These flat rates incorporate both junior and senior staff salaries and should account for costs such as loss of staff labor hours to administrative duties and paid time off for staff, projected cost increases (e.g., for benefits and merit increases), and contributions to cash reserves.

Several NNIP Partners use **sliding scale rates** to differentiate hourly costs by the type of client. For example, local non-profit organizations may get a heavily discounted rate, local governments an "in between" rate, and for-profit private sector entities or large foundations pay full price.

SETTING UP A STRATEGIC PROCESS FOR PROPOSALS

Soliciting funding requires a **proposal development stage** to detail project scope, deliverables and cost to potential clients. Proposal development can be a costly and time-consuming process, so it is important for organizations to establish internal guidelines to manage the proposal development process. Sometimes the proposal development stage is a maddening 72-hour sprint, but even when that is true, internal processes should be followed to limit exposure to risk.

The following tips come from NNIP Partner's experience developing competitive proposals:

Evaluate proposal opportunities against organizational strengths, capacity, and mission. NNIP Partners have learned to be more selective about accepting work that is aligned with their

⁴ For more guidance on overhead, see the Council of Nonprofits guide to understanding overhead: https://www.councilofnonprofits.org/tools-resources/misunderstanding-overhead.

organizations to avoid mission creep. To do this, local data intermediaries must feel comfortable saying "no" to potential projects that may stray away from mission priorities. Where possible, organizations should try to refer declined projects to trustworthy partners to use a "no" as an opportunity to strengthen funder relationship. Projects that take an organization a bit outside of their strengths can be used to grow an organization's scope of work or reputation but do make for riskier (harder to win) proposals. Investing in these proposals should be carefully considered as winning the project and not being able to effectively execute the work could jeopardize the reputation of an organization. Decisions on whether to pursue work must also consider hiring needs in both the short and long-term. One NNIP Partner reflected, "you have to choose projects carefully so that you have adequate capacity to do them. Can't say yes to everything."

Develop strategic decision-making tools. Several NNIP Partners have developed guidelines or criteria to help staff and leadership decide whether to pursue new funding opportunities. These decision-making tools combine screening questions to assess (1) alignment with the organization's mission and core priorities, (2) potential for impact, (3) capacity to complete the work with rigor and neutrality, and (4) existence of sufficient funds and staff resources to complete the work. For example, one Partner, Data Driven Detroit, has developed a "strategy screen" which is a decision tree to help guide internal decision-making on which projects to pursue (see Appendix 2). The strategy screen is a list of questions, represented visually, that staff and leadership ask themselves at the start of each proposal.

Determine the appropriate time and resources to spend on a proposal upfront. To be strategic it's important to decide before working on a proposal how much time and money should be spent developing the proposal and scope of work. Doing so in advance allows your mission and priorities to direct spending. Encouraging funders to commit to recurring work may also reduce time spent on proposal development. As a rule of thumb, proposal development should not exceed five percent of anticipated award cost. One NNIP Partner relies on a formula to dedicate internal resources for proposal development on a project-by-project basis: total estimated cost x likelihood of winning proposal x five percent. For example, in response to an RFP from a familiar client for \$100,000, the NNIP Partner estimates a 90% likelihood of winning and thus sets aside \$4,500 in resources for proposal development. To estimate the likelihood of winning an award, consider your organization's competitive advantage for the proposed scope of work as well as the likelihood of the funder awarding the work. For funders that appear to be in more of an exploratory stage, it is better to provide a concise summary of competencies than a full proposal. Being mindful of proposal development costs is especially important for small, one-off projects, which may require a proposal development effort close to or in excess of the

project-support funding itself. However, certain proposals may warrant greater investment and risk to establish new funder relationships or develop strategic areas of work. Screening tools such as the one described above may help organizations identify a risky, but important opportunity.

Develop internal review processes for proposals. Internal review processes should involve a review of the proposal and approval by senior-level staff members. These processes ensure the organization has the capacity to implement the proposed work. Senior staff should review technical and staff capacity and availability as well as timeline and budget. The strong reputation of local data intermediaries is essential for the sustainability of work in the future and ensuring feasibility and rigor of proposals is one important safeguard on an organization's reputation.

CONCLUSION

The advice on business planning and strategy shared in this document reflects the accumulated wisdom of the NNIP network. As the network has evolved over time, we have found that the activities and funding landscape for local data intermediaries are in constant evolution. As such, both new and existing organizations are encouraged to revisit and refine their business models and organizational processes to strengthen the sustainability of these activities. NNIP Partners have found it incredibly valuable to share their challenges and successes in this realm with each other. We encourage organizations engaged in local data intermediary activities to seek out other organizations to learn from them and share with them your own efforts. Ultimately, financially healthy and sustainably run organizations will be better able to serve the needs of their communities and help nonprofits, government, foundations and residents work towards reducing inequities and improving the health and wellbeing of communities.

APPENDICES

APPENDIX 1. PROJECT MANAGEMENT AND TIME TRACKING SOFTWARE

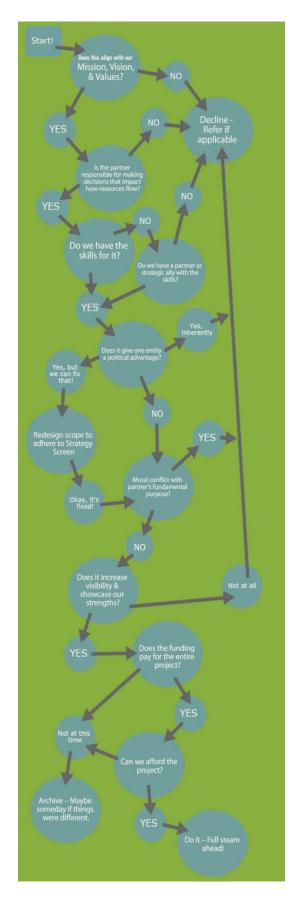
There are a myriad of project and time tracking software options available for local data intermediaries to use to manage projects and track staff time. NNIP Partners facilitated a discussion of these options at an NNIPCamp Session "Project Management Deathmatch" at the 2014 partner meeting. Examples of project management and time tracking software used by local data intermediaries which emerged from that discussion are listed below. NNIP Partners stress the importance of staff and organizational adoption of these tools to make them useful for the organization. Before investing in a system, organizations should test several options to see which is the best fit. Please note, this list does not constitute an endorsement of any of these tools by NNIP.

Tools that are used for time tracking in addition to project management are noted with an *.

- Asana: www.asana.com
- Base Camp: https://basecamp.com/
- Freedcamp*: https://freedcamp.com/
- Google Spreadsheets & Tasks
- Harvest*: https://www.getharvest.com/
- Microsoft Office Suite (Excel* and Outlook)
- Open Air*: www.openair.com/
- Open Atrium: www.openatrium.com/
- Pivotal: https://pivotal.io/
- Smart Sheet: www.smartsheet.com/
- Sona*: https://www.sona-systems.com/default.aspx
- Toggl*: www.toggl.com/

APPENDIX 2. SAMPLE STRATEGY SCREEN

NNIP Partner, Data Driven Detroit, uses the following strategy screen as a decisionmaking tool when deciding whether to pursue new projects.



APPENDIX 3. NNIP RESOURCES

- Cowan, Jake and G. Thomas Kingsley. 2015. Monitoring Impact: Performance Management for Local Data Intermediaries. Washington, DC: National Neighborhood Indicators Partnership and Urban Institute. http://www.urban.org/research/publication/monitoring-impact-performance-management-localdata-intermediaries.
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NNIP is a collaboration between the Urban Institute and partner organizations in more than thirty
American cities. NNIP partners democratize data: they make it accessible and easy to understand and then help local stakeholders apply it to solve problems in their communities.



For more information about NNIP, go to www.neighborhoodindicators.org or email nnip@urban.org.