



## The Approachable Data Folks



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More About  
GWD

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### **DEAR ORGANIZATION THAT IS SWIMMING AND OVERWHELMED WITH YOUR DATA,**

At Grounded With Data (GWD), we understand that other great small businesses focus only on quantitative or qualitative research. While we can also do qualitative and quantitative large-scale projects, one of our strengths is combining both types of research and incorporating them into literature reviews that help provide corroborating information or show that the results are new.



Our rigorous methodology for conducting literature reviews generally allows us to bring in new insights using old information. We change perspectives, think of new ways to review, find themes, and identify the "so what" and "now what" of doing literature reviews. Then, based on the initial question, we can provide our findings in an approachable way that is easily absorbed by different audiences. We can get nerdy, but we can also create a broadly relatable model or stratification of our understanding.

Another of our strengths is our many different subcontractors from diverse backgrounds and demographics. We find nerdy friends who love to learn as much as we do and engage them as independent contractors and single-entity LLCs for our various projects. This gives us a great mix of perspectives when conducting a literature review. Usually, the average educational degree of a team on a project is a Master's Degree, and we have at least three different age generations on every project.

★ All of our QR Codes are scannable and hyperlinked!

We can also take all of your disjointed data sources and put them together into an overarching story, a type of meta-analysis. Like abstract artists, we enjoy combining different shapes and colors to create something that makes sense. Ultimately, we will create a story that shows relationships and continuity or identifies challenges or outliers that need further investigation.



Suppose we are always aware of what's going on with your quantitative and qualitative research projects. In that case, we can treat those reports as literature reviews and combine them with other information based on what we see. We can validate the data from those studies with supporting literature reviews or discover that the studies differ from what the literature reviews found. We ask for more from the information we have to identify what has changed or is new.

At Grounded With Data, we have a knack for assembling a process model that describes what is happening within the system. We would be thrilled to bring our expertise to your projects and help you achieve your research goals.

Sincerely,

*Patti & Jack*



Jack & Patti have a [YouTube Channel](#) dedicated to making data approachable.

**WE CAN PROVIDE FINDINGS IN APPROACHABLE WAYS,  
EASILY ABSORBED BY VARIED AUDIENCES**



## The Approachable Data Folks



### **ORGANIZATIONAL QUALIFICATIONS RELATED TO TECHNICAL COMPETENCIES**

Grounded With Data offers accelerated marketing thinking that is rarely seen for Profits and Nonprofits.

We do that as “Approachable Data Folks” - we offer high-quality analysis and insights without intimidation.

We love finding ways to “change the game.” And we strive to have at least one “well, I never thought about it that way before” moment.

We always focus our research and insights to help you answer, “so what?”

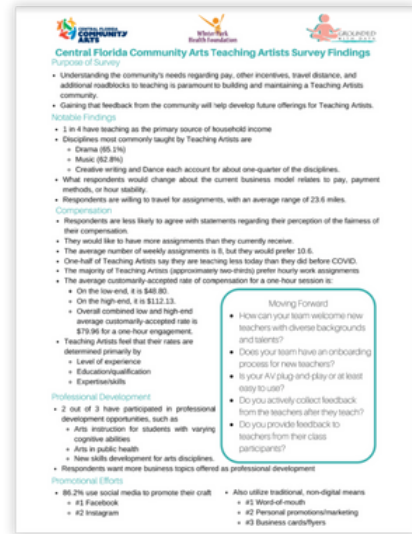
As a market research company, we have a systematically rigorous approach to literature and evidence reviews, whether it involves hunting for information or receiving research. Before the project commences, we ask questions upfront to determine the goal of the literature review and what questions we are trying to answer to ensure focus. If there are no specific questions, we establish a hypothesis or desired outcome knowing there is a nexus between science and art where answers can be found.

When we receive research, we review the meta-information to examine its validity and potential bias. Next, we review all relevant abstracts to understand the landscape and what the pieces mean. Sometimes our learning at this phase is key terminology and ways to refine our search criteria. After we have a significantly robust body of knowledge, we layer the insights into different themes and assign further review and research to contractors based on their personal interest and excitement regarding the subject to do deep dives to create broad overviews. Throughout this process, the team constantly communicates with one another, developing the narrative based on themes and subthemes discovered during the investigation. This collaboration allows the team to weave unique stories from multiple varied perspectives but on a central foundation of shared intelligence.

We have worked with many subject matter experts who were generally overwhelmed with the research they had on hand. Kindergarten-Ready Community needed our coaching to pull relevant information from the literature, research, and white papers. They wanted to create a cohesive and compelling report on childhood development in Orlando and present data that supported the organization's goals. In the next few months, we will also be working with a budding nonprofit called Think of Me Please, where the executive director's board is sending her so much new research that she has no idea how to tackle it all. So we hope to do a literature review for her and help her develop the correct information for her pamphlet, white paper, and video series.

We often leverage our literature review skills as a reality check to validate our primary research and fill in the gaps to tell a more holistic story. We surveyed all the teaching artists in Orlando associated with Central Florida Community Arts. We asked them about their thoughts, feelings, and needs when they teach and what support they need, especially after the pandemic. We created the report and then literature-reviewed the results by creating a separate presentation which we delivered to the community with a one-sheet accompaniment.

We have a genius for turning qualitative data into quantitative data. We use standard classification and coding strategies to link similarly associated information based on a client's insights of what is essential and of interest to add measurable relative depth to the discussion.

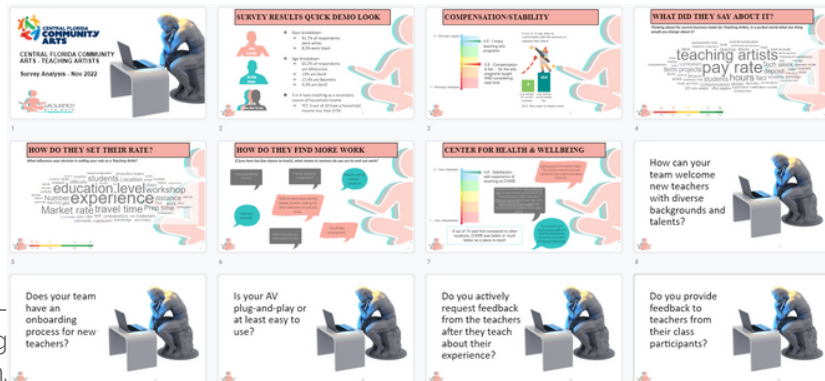


With ISO as an integral part of our past lives, we believe in teaching ISO standards to our team to ensure consistency and reliability. Our research hunting strategy is systematic and rigorous yet flexible, using a combination of academic research articles and internet search engines guided by data literacy principles to find relevant information. We use at least two to three different search engines, such as Google, Bing, etc., using varied search terms for diverse perspectives, and then we go five pages deep until we exhaust the thread of "new" relevant sources. We even contact the authors to access the data itself, if necessary.



Original Central Florida Community Arts survey results presentation

Our systematic approach to literature and evidence-based reviews and ability to find themes and associations among information sources, turn qualitative data into quantitative data, and teach ISO standards to our team makes us a reliable and efficient market research company.



Presentation to the arts community - giving key points and facilitating further discussion.

## PAST PERFORMANCE

We are excited to walk you through three examples of our work for clients where we have performed literature reviews, plus a few add-on projects that came from those reviews.

First, we will show you our work with the Central Florida Substance Abuse Coalition (CFSAC). We partnered with a local marketing agency and created a deep-dive report they used to develop their new marketing campaign. We created a novel Gen Z Communication Messaging & Transmission Model as part of the work. We also continued to inform others of the results through separate presentations of the materials for different audiences.

Second, we'll take you through a different literature review analysis where we used our learnings from CFSAC and found new insights for Gen Z and their needs after the pandemic. We were contracted by the Winter Park Health Foundation and leveraged the American School Health Association as a baseline resource.

Third, we'll swing to the other side of the generational spectrum and discuss our literature review and results for understanding the aging population and their needs and desires to "creatively age" (no one wants to call themselves a senior anymore). The Foundation for a Healthier West Orange needed this information to plan how to build a new center for this demographic. We helped set the stage and did more than a literature review, so we'll mention that, too.

### Central Florida Substance Abuse Coalition

Carolyn Capern, Owner, CTS Agency  
carolyn@cts.agency

CTS Agency wanted to create a powerful, engaging marketing campaign for the Central Florida Substance Abuse Coalition (CFSAC). The target audience was Generation Z. There was little easily-accessible information about how Gen Z receives messages and what makes them want to engage with a product. CTS also wanted to ensure that the message resonated with Generation Z and that they would amplify it.

We assembled our typical team of Jack (Ph.D.) and Patti (MBA), along with Lee (MA) and Antonio (Ph.D.), **to conduct the literature reviews and find trends and themes.** We conducted **web searches, field scanned, and analyzed the landscape using various methods.** Jack and Patti formulated a model that helped the marketing agency test its messaging strategies to ensure resonance and amplification.

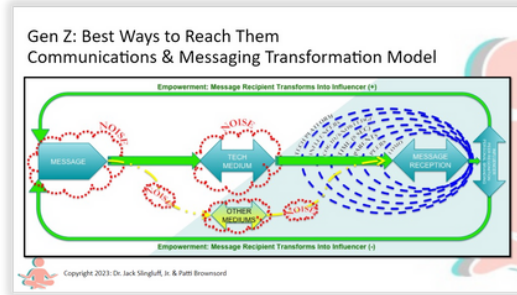
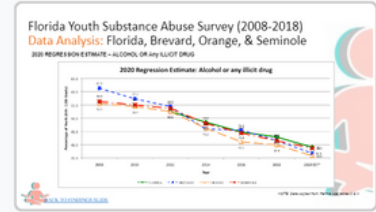
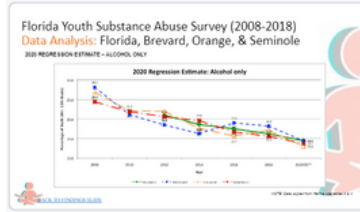
We created a presentation that discussed in-depth third-party market research conducted on Generation Z, including their characteristics and traits, needs, and how they receive information. The study found that Generation Z focuses on influencers, peer recognition, and uniqueness. These traits should be considered when developing messaging strategies.



The first three pages of our 62-page report for CTS.



We also analyzed the Florida Youth Substance Abuse Survey results for the past ten years by manually combining the data since it wasn't publicly available in that format to understand how



they perceived substances and how their perceptions and usage have changed. We created the Communication Messaging & Transformation Model to ensure that messaging strategies aligned with the needs of Generation Z. Additionally, we recommended media plan optimization techniques based on the model. The presentation provided valuable insights into

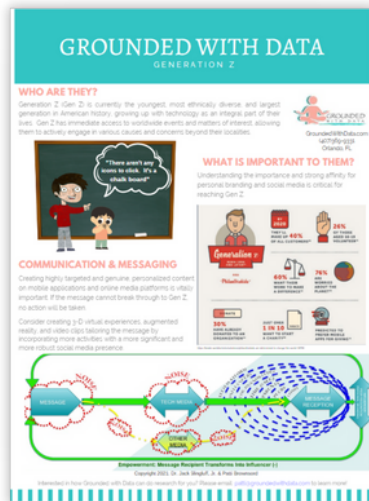
effectively communicating with Gen Z, including understanding their needs and using targeted messaging strategies that align with their values and preferences.

Based on our experience and new knowledge of the information, we also drafted recommendations for how CFSAC and CTS should incorporate these learnings. We suggested several strategies for crafting effective messaging for Generation Z regarding substance use disorder (SUD). We recommended engaging Gen Z and their parents in focus groups to develop messaging, as well as utilizing data sources such as the Florida Youth Substance Abuse Survey to prioritize substance-specific messaging. The messaging should also incorporate recommended strategies, capitalize on Gen Z's knowledge and preferences, and account for variations in language and communications between cultures.

We stressed that the messaging should be personalized to account for age, gender/gender identity, race/ethnicity, and culture and should play to Gen Z's desire for positive peer recognition, personal branding, and FOMO. It is crucial to use Gen Z's preferred media, adapt to their evolving preferences, such as Instagram and Snapchat, and create buzz around products using hashtags.

Lastly, the messaging should be experience-based, enable social media sharing, and be concise, visual, and easily interactive. By following these strategies, messaging can effectively counter stigma and de-normalize misuse among Generation Z.

Two of the four emails we created to highlight insights from the report.



Based on all of this information, CTS Agency created the [betterwithout.it](https://www.betterwithout.it) campaign, as well as a phone app that is a game. Carolyn with CTS said, "Your amazing reports are making our team feel creatively 'super-charged!'"

While our extensive research findings were consumable by CTS, we knew that presenting them to CFSAC could be less detailed. They only wanted to know the unique learnings that set Gen Z apart from other generations. Therefore, we created a second presentation highlighting the information they needed.

Because this information was so valuable to others, we wrote a full research paper with a shortened "highlights" article from

this information so others could learn. Since we published them on our website in August 2022, we've had more than 70 views of this research (as of February 2023). We also created a series of email newsletters that provided research overviews. We sent it to our clients and friends, who opened them more than 600 times.

## Winter Park Health Foundation

Deb Watson, Executive Vice President  
[dwatson@wphf.org](mailto:dwatson@wphf.org)

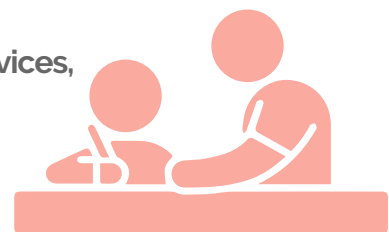
The project aimed to refresh the Coordinated Youth Initiative (CYI) program and measure its success through best practices, asset mapping, and evaluation metrics. The Foundation for Orange County Public Schools acted as the fiscal agent for the WPHF grant for the work commissioned by GWD. We created an evidence review plan with monthly activities and update those activities after each month to receive the funding. We also reviewed the findings with the client and American School Health Association (ASHA) at different stages.

Jack (Ph.D.) and Patti (MBA) enlisted the help of Lee (MA), Antonio (Ph.D.), Amy, Ellie (MSx2), Nicholas (MPH candidate), and Karla (MPH candidate) to work on the projects.

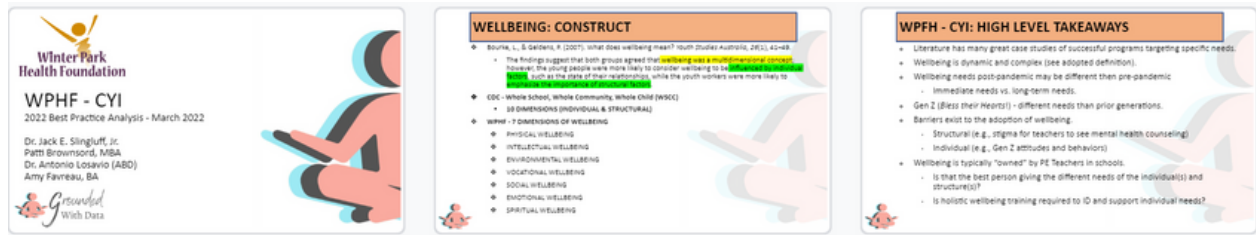
The project has three main scopes: Best Practice Research & Development, Asset Mapping, and School Nurses' Perceptions.

The scope of Best Practice Research & Development included:

- **A literature review of best practices for school-based services,**
- Working with subject matter experts at ASHA,
- **Researching similar best practices in the field,**
- **Profiling other organizations, and**
- Identifying and recommending applicable best practices.



Nicholas was the WPHF intern, and we took him under our wing and trained him how to analyze the past 20 years of the CYI program to find any possible **meta-findings that could be used to show consistent trends** that may have endured post-pandemic.



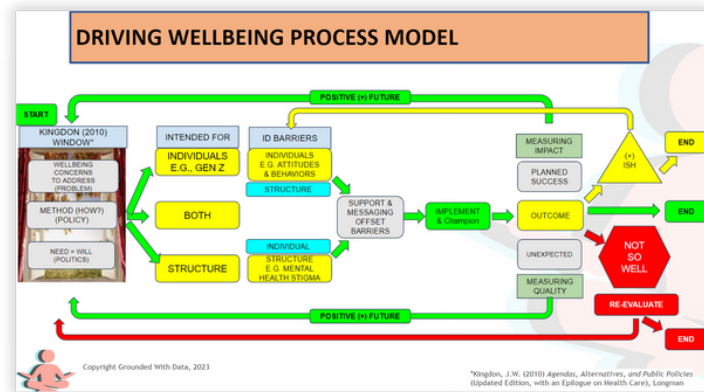
The Asset Mapping scope involved asset mapping in the three communities (Winter Park, Maitland, and Eatonville) to remove duplicated services and discover gaps. Working with WPHF contacts, the project team identified types of services under review based on previously identified best practices and researched public/private services available in the communities to identify gaps. The deliverable was a report on findings and an inventory of resources with light recommendations on potential KPI metrics for consideration in planning. We also surveyed the local school contacts to learn their perception of Gen Z's needs after the pandemic.

The third scope had the WPHF intern, Karla, survey school nurses to understand their needs and opinions on student health. Jack taught her to conduct surveys and use the Delphi technique to evolve questions. Findings revealed that, on average, nurses saw one student every 10 minutes and provided emotional support, medication, and medical care. In addition, while nurses were generally overworked, they enjoyed their job despite signs of burnout.

"Thank you to Patti, Jack, and the Grounded with Data team for your comprehensive assessment and recommendations for the Winter Park Health Foundation's Coordinated Youth Initiative. Your thorough and timely work provided us with eye-opening data that will play a central role in the future of the Foundation's youth-focused philanthropic work."

- Melodie Griffin, Community Outreach Director

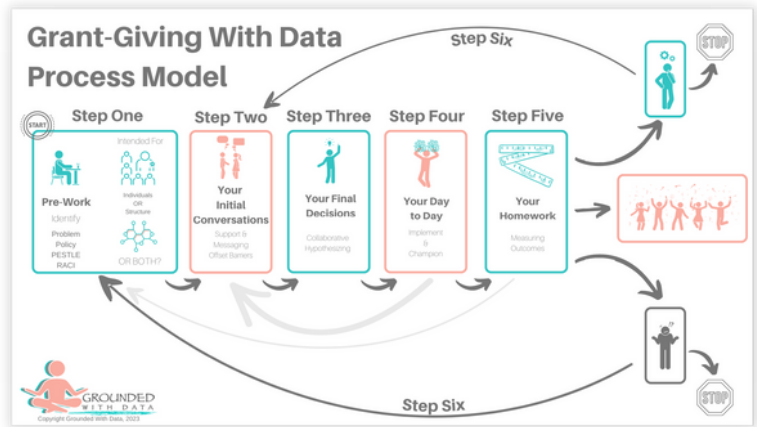
We created quite a few models and repeatable processes during this project. Our pride and joy model was our Driving Wellbeing Process Model. Our first pass at its development was academically inclined. Still, we have now reworked it to be actionable. We have presented it to more than fifty foundations as a potential model for trust-based philanthropy.



We now call it the Grant Giving with Data Process Model, a framework designed to help nonprofit organizations use data effectively in their grant application process. The model consists of six stages:



- 1) Identifying the problem,
- 2) Collecting and analyzing data,
- 3) Developing a logic model,
- 4) Creating a budget and work plan,
- 5) Evaluating and reporting outcomes, and
- 6) Identifying the next steps based on the outcomes.



It emphasizes the importance of collaboration between program staff and data experts at each stage to ensure data is used to inform decisions and improve outcomes. The model is designed to be flexible and adaptable to different types of organizations and grant applications. The overall message is that using data effectively in the grant application process can improve the chances of beneficial collaboration between the foundation and funding recipient, ultimately leading to better outcomes for the organizations and the communities they serve.

We have now created [a research paper on our findings](#). In addition, we are ramping up a communications plan to showcase the work, similar to how we amplified our learnings on Gen Z when we worked with the Central Florida Substance Abuse Coalition.

The image shows a grid of 15 presentation slides. The slides cover various topics related to the process model, including:

- Slide 1:** Outcomes & Impacts
- Slide 2:** Half of nonprofits don't really use the data they collect. Why?
- Slide 3:** Why do foundations need data?
- Slide 4:** How can foundations use data more?
- Slide 5:** Today's Webinar Questions
- Slide 6:** WARNING
- Slide 7:** ALSO NOTE
- Slide 8:** The Big Steps
- Slide 9:** 1) Your Pre-Work
- Slide 10:** 1) Your Pre-Work: P.E.S.T.L.E.
- Slide 11:** 1) Your Pre-Work: R.A.C.I.
- Slide 12:** Who do you intend to help with the grant?
- Slide 13:** 2) Your Initial Conversations
- Slide 14:** 3) Your Final Decisions
- Slide 15:** 4) Your Day to Day
- Slide 16:** 5) Your Homework
- Slide 17:** 6) Your Re-Work
- Slide 18:** 6) Your Re-Work
- Slide 19:** 6) Your Re-Work
- Slide 20:** Grant-Giving With Data Process Model (summary diagram)

We have recently presented this framework to ProNet, an organization that provides resources to those who work for foundations. The above is the portion of the presentation pertaining to our model.

## Foundation for a Healthier West Orange

Tracy Swanson, CEO of Foundation for a Healthier West Orange  
tswanson@fhwo.org

The Foundation for a Healthier West Orange (FHWO) engaged us to conduct a study to understand the best practices, needs, and gaps surrounding aging as they researched and determined the feasibility of a creative aging concept.

Our team at GWD utilized various research methods to gather data and insights for the study. First, we began using Census data to understand the demographic makeup of people over 50 within the community and a 3-mile radius around a potential target location. This helped us gain an understanding of the age distribution and population density of the area.

Next, **we conducted a literature review of best practices regarding a Creative Aging Center. This involved reviewing peer-reviewed articles, trade publications, journals, and governmental resources and conducting internet searches to gather information on successful aging programs and facilities.**

We then collaborated with Cobalt Community Research (CCR), a not-for-profit focused on research and education for local government and other not-for-profit organizations, and FHWO on a community survey to ask local seniors what they wanted and would use. The survey was designed to identify the needs and preferences of the target population for the creative aging concept.

To complement the community survey, we conducted asset mapping to identify existing services for seniors to remove duplicated services and discover gaps. This involved gathering information on existing facilities and services that cater to seniors and assessing their effectiveness and potential for partnership.

In the fourth and final part of our 2022 research, we conducted a gap analysis to identify the availability of activities and services for older adults in the local market. In fact, we even developed an estimated Adoption Model to help FHWO estimate the potential population by distance ranges that may visit a new site to participate in activities or services.

Jack (Ph.D.) and Patti (MBA) enlisted the help of Lee (MA), Antonio (Ph.D.), Amy, Ellie (MSx2), and Nicholas (MPH candidate) to work on the research projects. In addition, William (MA) from CCR collaborated with our team to work on the census and community survey projects.

"It's very helpful. I mean, it's an overwhelming amount of data. But it's exactly what we needed to make the right decisions about what's best for the residents. And ... what do they really like? Where will they go? Is it already there? Does it need to be built? We definitely have enough data to start working on those next steps." – Janet Ziomek, responsible for the Center for Creating Aging Project