Youth Finance Institute of America

In Person Workshop Data Guidelines

Summer 2023 Project

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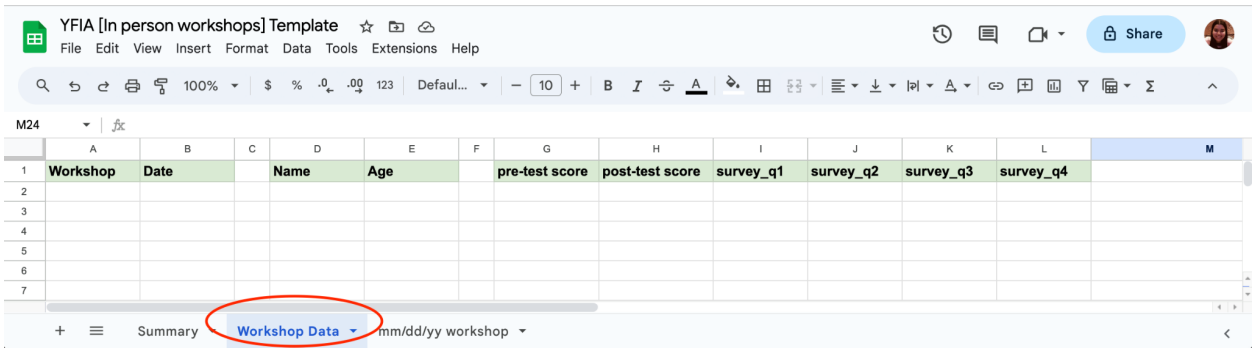
Instructions

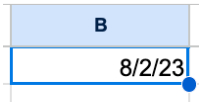
1. Create a copy of the “YFIA [In person workshops] Template” file
2. Open up the “workshop data” sheet



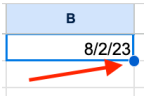
Column	Instructions
Workshop	You have the liberty to enter in the workshop organization (RP, UCB TRIO, etc) or topic (Budgeting, First Apartment, etc) - whatever you feel is right for you.
Date	Enter in the date of the workshop using the following formula: =date(YYYY, MM, DD)
Name	Enter manually
Age	Enter manually
Pre-test score	Sum up score and type in number correct out of five
Post-test score	Sum up score and type in number correct out of five
survey_q1	Type in satisfaction score (specific number between 1-5)
survey_q2	1 for yes 0 for no
survey_q3	1 for yes 0 for no
survey_q4	1 for yes 0 for no

💡For the workshop and date columns specifically, you will be entering the same value multiple times into each row. An easier way to to do this is to drag down one cell of the value for as many rows as needed:

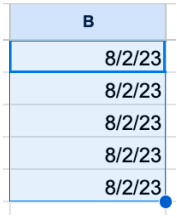
a. Click the cell you need to copy



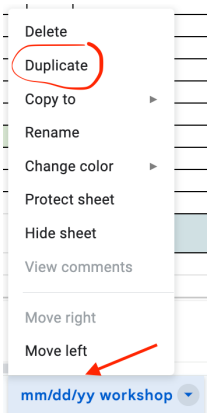
b. Hover mouse over blue dot

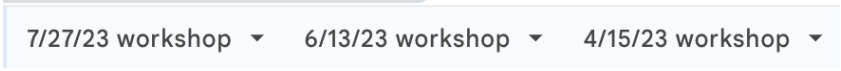


c. Click and drag down



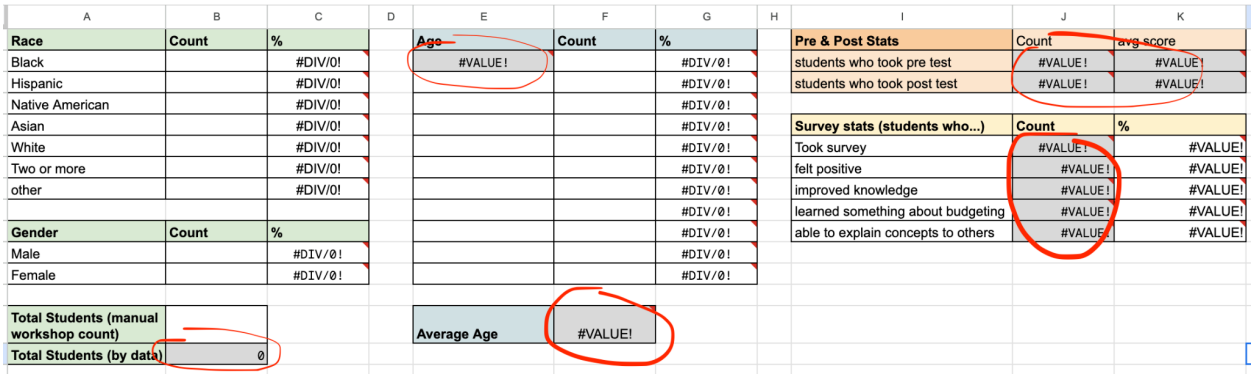
3. Once the workshop data is all entered in successfully, go down to the "mm/dd/yy workshop" sheet and create a copy, editing the date based on corresponding workshop date



Example: 

4. Manually enter in the race count
5. Manually enter in the gender count
6. Manually enter in total students in the manual workshop count box (OPTIONAL, since all other calculations utilize the data based total student count)

7. Pay attention to the **cells highlighted in gray** in the spreadsheet, in these cells you need to click on them and edit in the date of the workshop



Race	Count	%
Black		#DIV/0!
Hispanic		#DIV/0!
Native American		#DIV/0!
Asian		#DIV/0!
White		#DIV/0!
Two or more		#DIV/0!
other		#DIV/0!

Gender	Count	%
Male		#DIV/0!
Female		#DIV/0!

Total Students (manual workshop count)	
Total Students (by data)	0

Age	Count	%
#VALUE!		#DIV/0!

Average Age	#VALUE!

Pre & Post Stats	Count	avg score
students who took pre test	#VALUE!	#VALUE!
students who took post test	#VALUE!	#VALUE!

Survey stats (students who...)	Count	%
Took survey	#VALUE!	#VALUE!
felt positive	#VALUE!	#VALUE!
improved knowledge	#VALUE!	#VALUE!
learned something about budgeting	#VALUE!	#VALUE!
able to explain concepts to others	#VALUE!	#VALUE!

Cell	Topic	Instructions

B15	Total students (by data)	`=COUNTIF('Workshop Data'!B:B, "=mm/dd/yy")`
		Replace mm/dd/yy with actual date of the workshop
		`=COUNTIF('Workshop Data'!B:B, "=7/27/23")`

E2	Age	`=transpose(query('Workshop Data'!$A:$L, "select count(D) where B = date '2023-07-27' pivot E ",-1))`
		Replace ‘yyyy-mm-dd’ with actual date of the workshop
		`=transpose(query('Workshop Data'!$A:$L, "select count(D) where B = date 'yyyy-mm-dd' pivot E ",-1))`

F14	Average Age	`=round(transpose(query('Workshop Data'!$A:$L, "select avg(E) where B = date 'yyyy-mm-dd' label avg(E) ''", -1)),1)`
		Replace ‘yyyy-mm-dd’ with actual date of the workshop
		`=round(transpose(query('Workshop Data'!$A:$L, "select avg(E) where B = date '2023-07-27' label avg(E) ''", -1)),1)`

J2	Students who took pre test	`=QUERY('Workshop Data'!$A:$L, "Select count(G) where B = date 'yyyy-mm-dd' and (G is not null and H is not null) label count(G) ''")`
		Replace ‘yyyy-mm-dd’ with actual date of the workshop
		`=QUERY('Workshop Data'!$A:$L, "Select count(G) where B = date '2023-07-27' and (G is not null and H is not null) label count(G) ''")`

J3	Students who took post test	`=QUERY('Workshop Data'!$A:$L, "Select count(G) where B = date 'yyyy-mm-dd' and (G is not null and H is not null) label count(G) ''")`
		Replace ‘yyyy-mm-dd’ with actual date of the workshop
		`=QUERY('Workshop Data'!$A:$L, "Select count(G) where B = date '2023-07-27' and (G is not null and H is not null) label count(G) ''")`

K2	Average pre test score	`=QUERY('Workshop Data'!$A:$L, "Select avg(G) where B = date 'yyyy-mm-dd' and (G is not null and H is not null) label avg(G) ''")` Replace ‘yyyy-mm-dd’ with actual date of the workshop

		`=QUERY('Workshop Data'!$A:$L, "Select avg(G) where B = date '2023-07-27' and (G is not null and H is not null) label avg(G) ''")`

K3	Average post test score	`=QUERY('Workshop Data'!$A:$L, "Select avg(H) where B = date 'yyyy-mm-dd' and (G is not null and H is not null) label avg(H) ''")`
		Replace 'yyyy-mm-dd' with actual date of the workshop
		`=QUERY('Workshop Data'!$A:$L, "Select avg(H) where B = date '2023-07-27' and (G is not null and H is not null) label avg(H) ''")`

J6	Count of students who took survey	`=QUERY('Workshop Data'!$A:$L, "Select count(B) where B = date 'yyyy-mm-dd' anc`
		Replace 'yyyy-mm-dd' with actual date of the workshop
		`=QUERY('Workshop Data'!$A:$L, "Select count(B) where B = date '2023-07-27' and`

J7	Count of students who felt positive	`=QUERY('Workshop Data'!$A:$L, "Select count(I) where B = date 'yyyy-mm-dd' and (I >= 4) label count(I) ''")`
		Replace 'yyyy-mm-dd' with actual date of the workshop
		`=QUERY('Workshop Data'!$A:$L, "Select count(I) where B = date '2023-07-27' and (I >= 4) label count(I) ''")`

J8	Count of students who improved knowledge	`=QUERY('Workshop Data'!$A:$L, "Select count(J) where B = date 'yyyy-mm-dd' and (J = 1) label count(J) ''")`
		Replace 'yyyy-mm-dd' with actual date of the workshop
		`=QUERY('Workshop Data'!$A:$L, "Select count(J) where B = date '2023-07-27' and (J = 1) label count(J) ''")`

J9	Count of students who learned something	`=QUERY('Workshop Data'!$A:$L, "Select count(K) where B = date 'yyyy-mm-dd' and (K =1) label count(K) ''")`
		Replace 'yyyy-mm-dd' with actual date of the workshop
		`=QUERY('Workshop Data'!$A:$L, "Select count(K) where B = date '2023-07-27' and (K =1) label count(K) ''")`

J10	Count of students who can teach others	`=QUERY('Workshop Data'!$A:$L, "Select count(L) where B = date 'yyyy-mm-dd' and (L = 1) label count(L) ''")`
		Replace 'yyyy-mm-dd' with actual date of the workshop
		`=QUERY('Workshop Data'!$A:$L, "Select count(L) where B = date '2023-07-27' and (L = 1) label count(L) ''")`

8. Once all the dates are entered, all other fields and visuals should self populate. **Reference example data file** as necessary to ensure successful completion of above steps.
9. Go to the summary table, inputs here should self populate but further work is needed to ensure the race and gender tables populate properly. The sub steps

a-e are **optional**, as the race and gender tables can be easily manually counted and imputed as needed. However I am including the steps taken to automate the process as it can be easier if a large number of workshops are held annually:

a. Locate the 'Count' columns in the race and gender tables:

Race	Count	%
Black	0	#DIV/0!
Hispanic	0	#DIV/0!
Native American	0	#DIV/0!
Asian	0	#DIV/0!
White	0	#DIV/0!
Two or more	0	#DIV/0!
other	0	#DIV/0!
SUMMARY TABLE		
Gender	**Count**	**%**
Male	0	#DIV/0!
Female	0	#DIV/0!

b. For each of the 'count' rows (9 total), you will see a function that looks like this:

```
=sum('mm/dd/yy workshop'!B2,'mm/dd/yy workshop'!B2,'mm/dd/yy workshop'!B2)
```

c. The values in the sum() function need to be updated based on the additional mm/dd/yy workshop files created:

```
=sum('7/27/23 workshop'!B2,'6/13/23 workshop'!B2,'4/15/23 workshop'!B2)
```

d. Edit the mm/dd/yy portions to match the workshop sheets, and feel free to include more as more workshops are created. For example, if you have four workshops this is how your sum function will look: =sum('7/27/23 workshop'!B2,'6/13/23 workshop'!B2,'4/15/23 workshop'!B2, '5/15/23 workshop'!B2)

e. Or, if you only have two workshops, this is how your sum function will look: =sum('7/27/23 workshop'!B2,'6/13/23 workshop'!B2)

10. Follow this procedure for all race and gender count rows and % will populate automatically.
11. Repeat all steps as necessary for additional workshop add ons!

Overview

Two specific Google Spreadsheets have been created:

1. YFIA [In person workshops] Example Data
2. YFIA [In person workshops] Template

YFIA [In person workshops] Example Data

This spreadsheet is identical in components to the template spreadsheet, but it is pre-populated with random data I used to test functions and visuals. This spreadsheet will show you how the charts should look once data is added into your own spreadsheet

➔ This worksheet can be useful to look back to if something doesn't seem to work when inputting actual data, to ensure format and functions are correct

YFIA [In person workshops] Template

This spreadsheet is the spreadsheet you will specifically be working with. I would recommend keeping the template itself blank and creating annual copies of it for all the data of that specific year. This will keep the data from getting too long and complex but still provide good annual figures, data, and information.

The Components

There are three sub sheets inside the main spreadsheet

1. Summary
2. Workshop data
3. mm/dd/yy workshop

Summary sheet

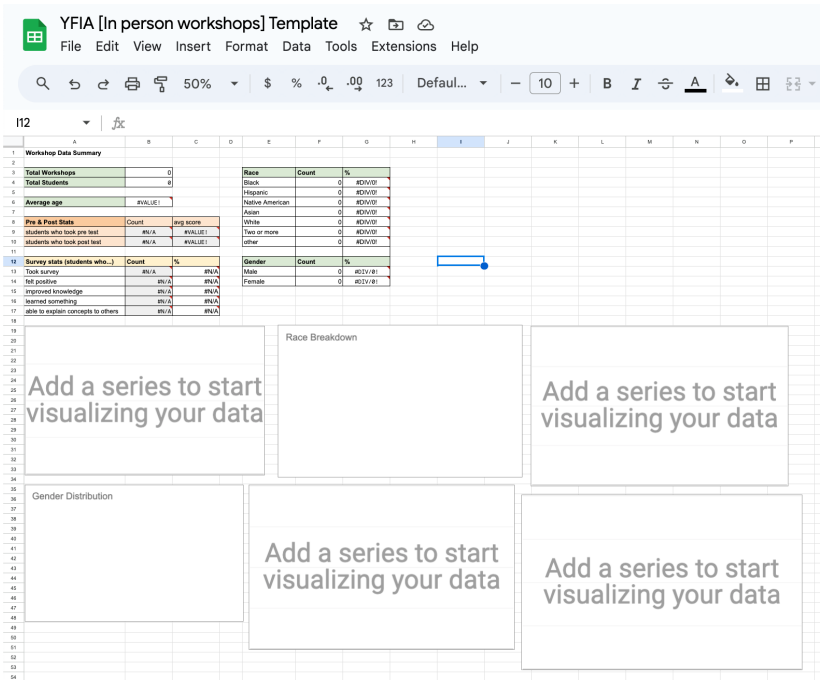
The summary sheet is where you can view an overall summarized report of all data for all workshops. This would essentially be your annual report as it will calculate totals based on all workshops included in the data.

What's included in the summary sheet:

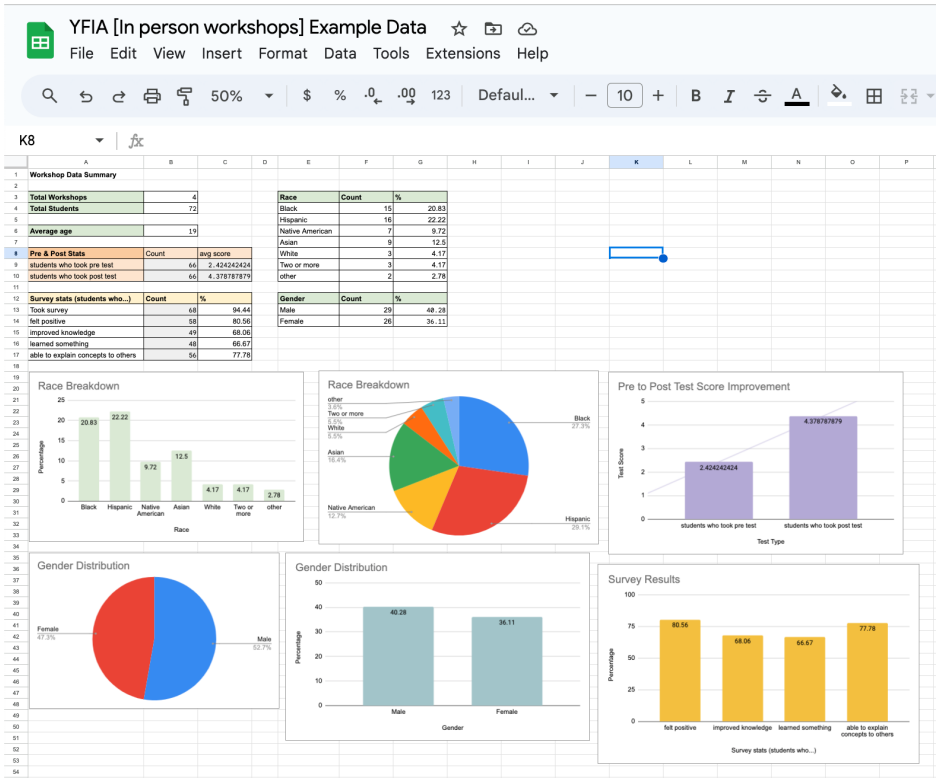
Data	**Visual**
Total number of workshops held	–
Total number of attendees	–
Average age of attendees	–
Number of attendees who took pre and post test	–
Pre test and post test average scores	Bar Graph
Survey results	Bar Graph
Race + gender information	Bar graphs + Pie Charts

As stated above, race and gender tables are included in the summary sheet. (Although I provide a method above on how to automatically get this data, it may be easier to just do this by hand as you see fit, the choice would be yours in this case). The corresponding visuals are again on a preference basis based on which visuals you feel are important or relevant to include in annual reports. Pie charts in data science are often not recommended given that it can be hard for us to perceive the difference in the circle, and bar graphs make that distinction more clear.

The summary sheet as included in the screenshot below is what you should see in the **template** version of the file. Ignore errors and empty charts, they should populate automatically once data is added into the workshop data sheet.



In order to see what this spreadsheet should look like once populated, reference the **example data** version of the file. I have included a screenshot below of what it would look like.



Workshop Data sheet

This sheet is where all of the data will be entered manually. There are 10 columns total where data must be entered. These include:

Column	Detail
Workshop	This is the column you can use to specify which specific in person workshop/topic was held. In the example sheet You'll see I used RP, but how this is distributed and used is based upon your preferences and needs. Also, since each row corresponds essentially to one attendee, the workshop topic must be copied and pasted for each individual attendee of that workshop.
Date	The date column is where you will type in the date for the workshop. In order to do this successfully the following function must be used: =date(YYYY, MM, DD) Also, since each row corresponds essentially to one attendee, the date must be copied and pasted for each individual attendee of that workshop.
Name	As title, this is where you would enter the name of the attendee.
Age	As title, this is where you would enter the age of the attendee.
Pre-test score	As title, this is where you would enter the pre test score of the attendee.
Post-test score	As title, this is where you would enter the post test score of the attendee.
survey_q1	As title, this is where you would enter the survey question 1 response of the attendee.
survey_q2	As title, this is where you would enter the survey question 2 response of the attendee.
survey_q3	As title, this is where you would enter the survey question 3 response of the attendee.
survey_q4	As title, this is where you would enter the survey question 4 response of the attendee.

Survey question 2 - 4 columns are binary encoded, which means that the input should be either 1 or 0.

Encoding (for survey questions)	
Yes	1
No	0

Empty spreadsheet (from template file):

Workshop	Date		Name	Age		pre-test score	post-test score	survey_q1	survey_q2	survey_q3	survey_q4

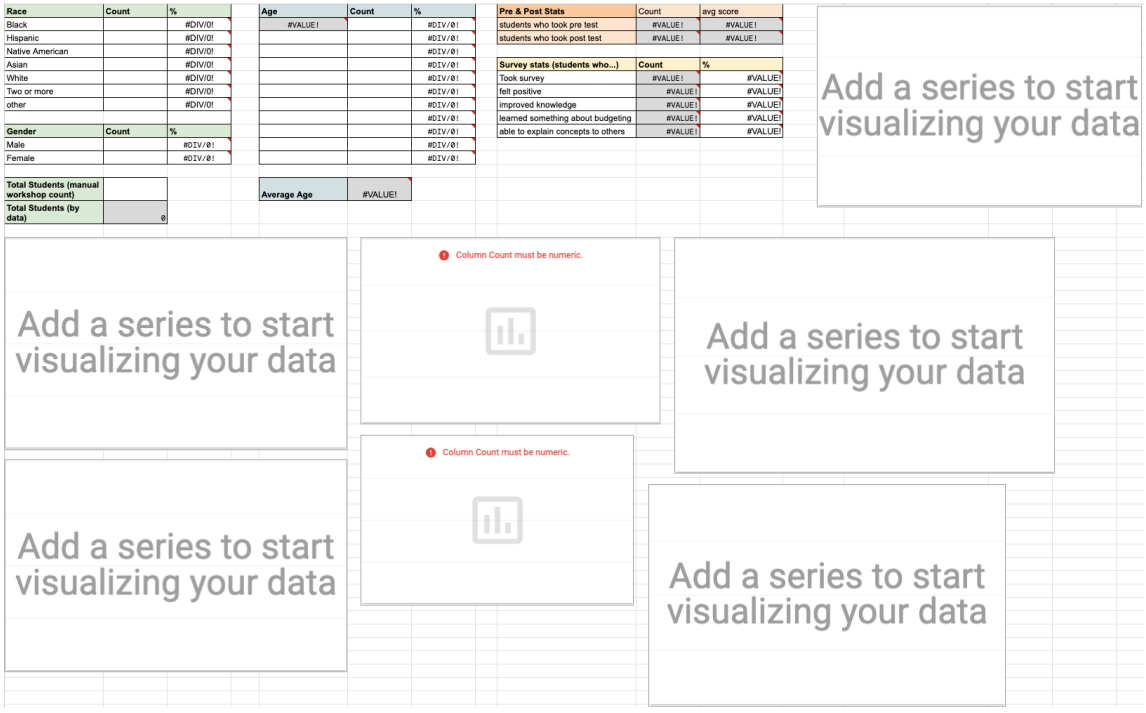
Populated spreadsheet (from example data file):

Workshop	Date		Name	Age		pre-test score	post-test score	survey_q1	survey_q2	survey_q3	survey_q4
RP	7/27/23		Jd	18		5	5	5	1	1	1
RP	7/27/23		ap	16		#N/A	#N/A	#N/A	#N/A	#N/A	#N/A
RP	7/27/23		is	17		3	5	5	1	1	1
RP	7/27/23		mn	28		2	5	4	1	1	1

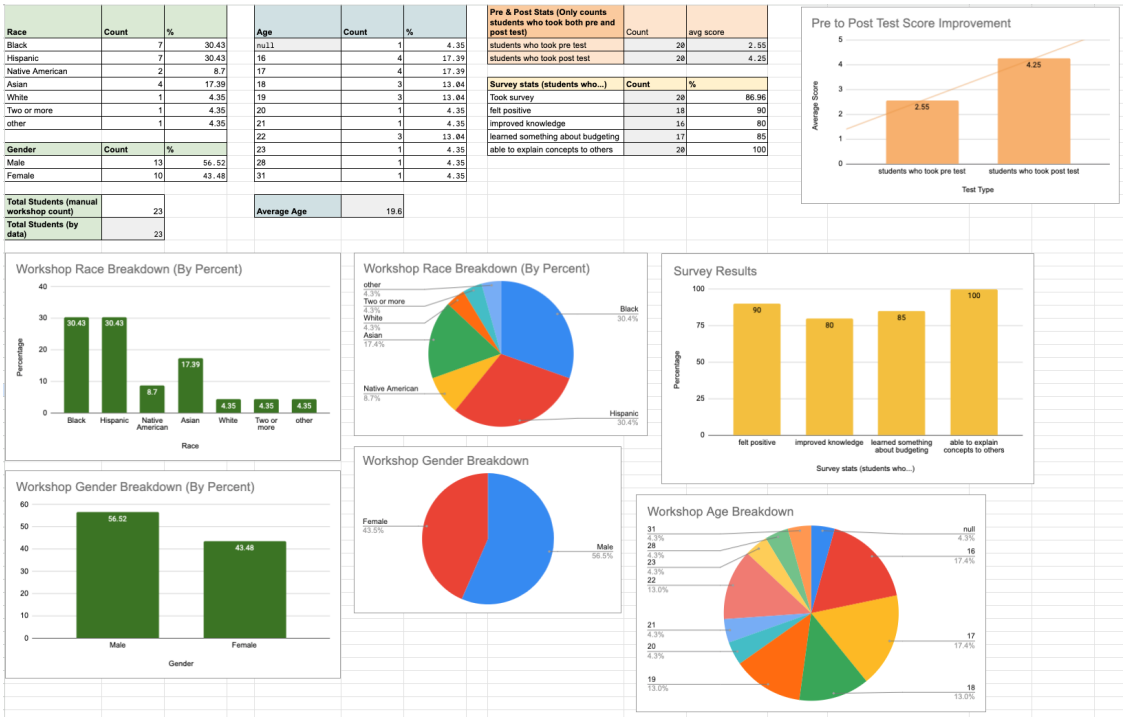
mm/dd//yy workshop sheet

This spreadsheet will analyze data for each individual workshop. When working with this yourself, you can create copies of this spreadsheet for each individual workshop hosted, and fill in the dates replacing mm/dd/yy.

Example of empty sheet (template file):



Example from populated sheet (example data file):



Race	Count	%
Black	7	30.43
Hispanic	7	30.43
Native American	2	8.7
Asian	4	17.39
White	1	4.35
Two or more	1	4.35
other	1	4.35

Gender	Count	%
Male	13	56.52
Female	10	43.48

Total Students (manual workshop count)	23
Total Students (by data)	23

Age	Count	%
null	1	4.35
16	4	17.39
17	4	17.39
18	3	13.04
19	3	13.04
20	1	4.35
21	1	4.35
22	3	13.04
23	1	4.35
28	1	4.35
31	1	4.35

Average Age	19.6

Pre & Post Stats (Only counts students who took both pre and post test)	Count	avg score
students who took pre test	20	2.55
students who took post test	20	4.25

Survey stats (students who...)	Count	%
Took survey	20	86.96
felt positive	18	90
improved knowledge	16	80
learned something about budgeting	17	85
able to explain concepts to others	20	100

There is a lot of information included in these workshop specific sheets. The values we find include:

Data	**Detail**	**Visual**
Race	Manual count, input manually	Bar graph and pie chart
Gender	Manual count, input manually	Bar graph and pie chart
Total students	Counts total students imputed into the workshop data spreadsheet using the function: =COUNTIF('Workshop Data'!B:B, "=mm/dd/yy")	–
Age	Each unique age, and number of students from that category at the workshop	Pie chart
Average Age	–	–
Pre/Post test	Number of students who took both tests, and their average scores	Bar graph
Survey	Number of students who took survey, and results from each question	Bar graph