

MONITORING MEMBER

- ENGAGEMENT AT
PORTLAND COMMUNITY SQUASH

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December 12th, 2023

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PROJECT CONTEXT

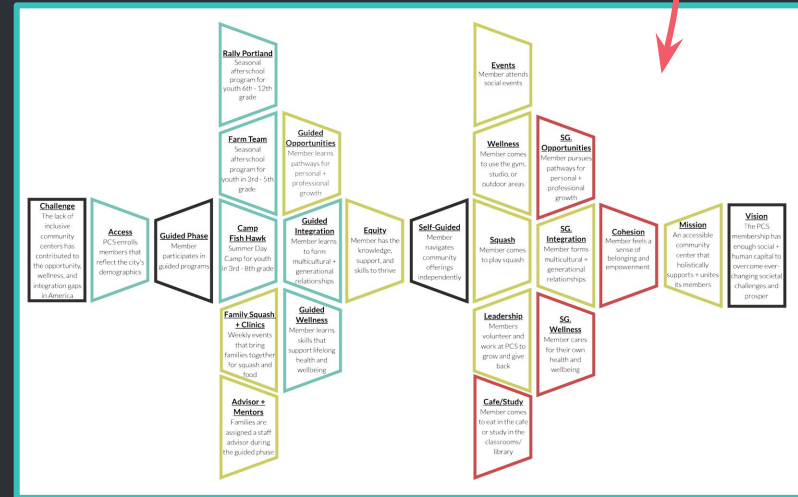
THE ASK:

Create a Tableau dashboard that builds upon an existing Theory of Change tracking tool.

DESIRED FEATURES:

- Quickly visualize individual TOC journeys
- Understand *who* is coming to PCS, *when* they are coming, and *what* they are doing

PCS Theory of Change





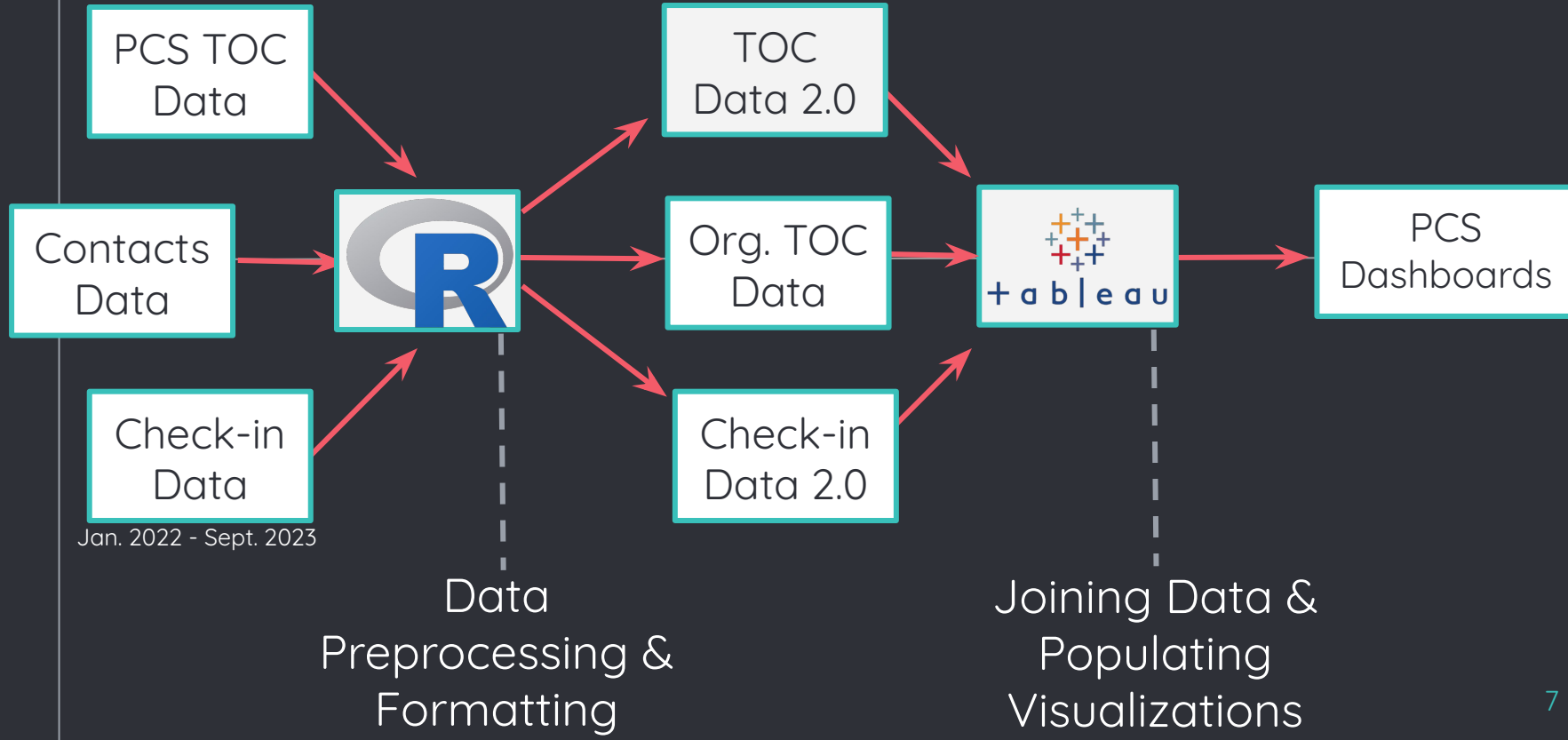
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OUR APPROACH

- GOALS

- - Create a Tableau dashboard that provides PCS with views of
 1. Individual member TOC journeys
 2. Organization-wide TOC progress
 3. Key operational metrics
 - Ensure our data-to-dashboard process is easy for PCS staff to update and repeat with future data

OUR PROCESS



OUR PRODUCT: A TRIO OF VIEWS

PCS Data Dashboards

Click a button to access a dashboard.

Operations Data

Explore PCS facility usage by member demographics, activity categories, and time-based variables.

Individual TOC

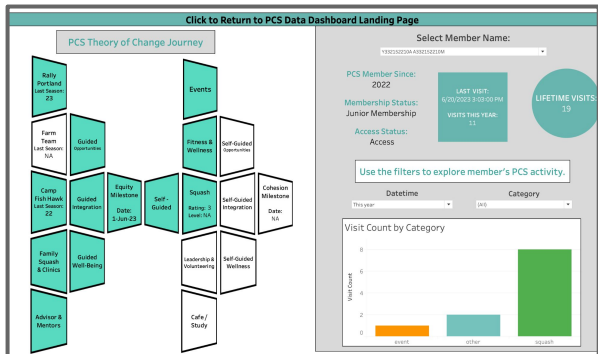
Visualize the TOC journey of a specific member and examine individual engagement with PCS.

Organizational TOC

Monitor progress towards PCS-wide TOC goals and explore participation numbers by member demographics.

A QUICK OVERVIEW OF EACH DASHBOARD

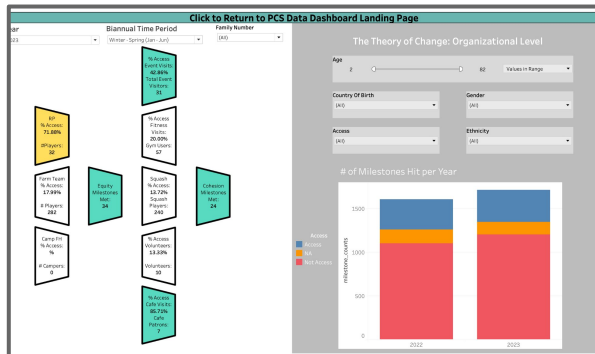
INDIVIDUAL MEMBER TOC



Provides a quick snapshot of

- TOC progress
- Membership details
- Recent PCS activity

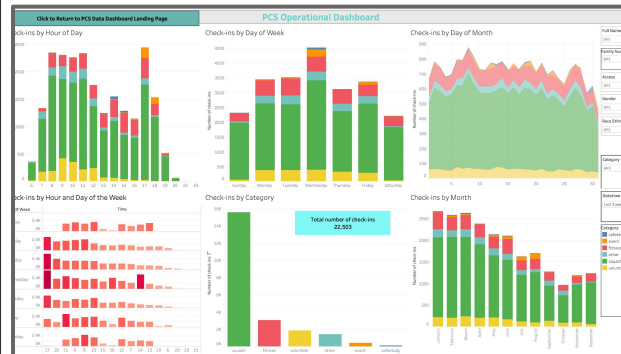
ORGANIZATIONAL TOC



Offers PCS-wide look at

- % Access membership
- Raw Participation numbers
- Filters by features of interest

OPERATIONAL METRICS



Illustrates facility usage with

- Organizational-level check-in metrics
- Check-in details for individuals and families

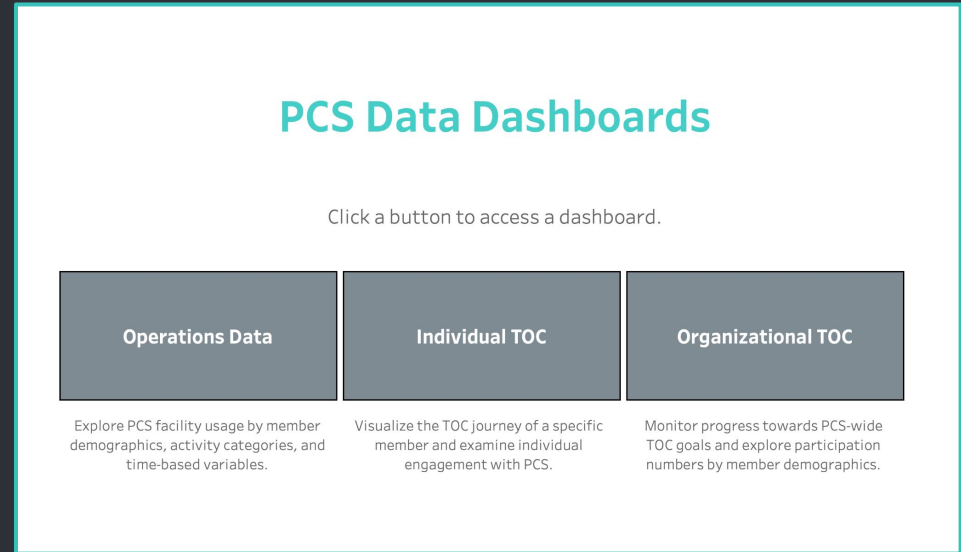
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DASHBOARD OVERVIEWS

● The PCS Dashboard Landing Page

○ Designed to provide easy navigation between dashboards.

*All three data dashboards contain a teal bar you can click to return to the PCS Dashboard Landing Page.



Tip: View Dashboards in Presentation Mode

Tableau - PCS_Dashboards_Team

Dashboard

Layout

PCS Data Dashboards

Click a button to access a dashboard.

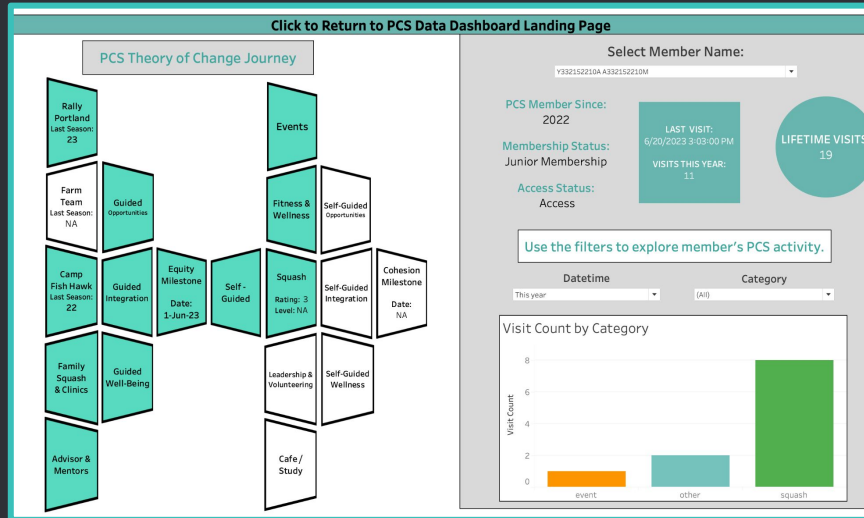
Operations Data	Individual TOC	Organizational TOC
Explore PCS facility usage by member demographics, activity categories, and time-based variables.	Visualize the TOC journey of a specific member and examine individual engagement with PCS.	Monitor progress towards PCS-wide TOC goals and explore participation numbers by member demographics.

Activate
Presentation
Mode

To Exit:
Press your
“**ESC**” key.

Individual TOC Dashboard

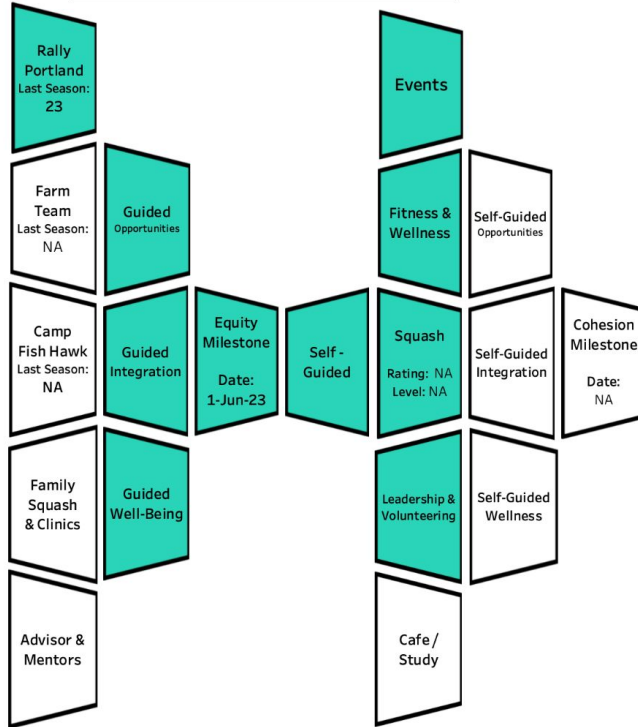
Designed to give a quick look at *member engagement* with PCS and their *TOC journey*.



2 Panels:

- PCS TOC Journey
 - Shows completed components of TOC
 - Shaded = Completed
 - Data populated from “Theory of Change” Insightly field
- Member Engagement
 - Shows membership type, most recent visit, yearly and lifetime visits
 - Bar chart shows visit counts and types for specified time scale
 - Data from iPad check-in

PCS Theory of Change Journey



Select Member Name:

A337732162A A337732162I

PCS Member Since:

2022

Membership Status:

Junior Membership

Access Status:

Access

LAST VISIT:
9/5/2023 11:32:00 AM

VISITS THIS YEAR:
59

LIFETIME VISITS:
115

Use the filters to explore member's PCS activity.

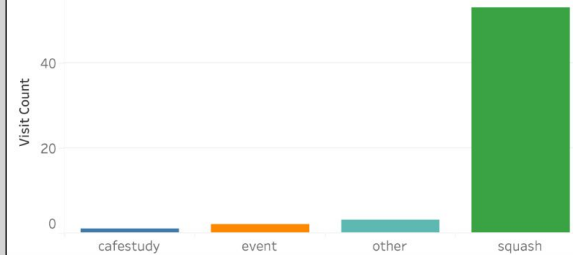
Time Frame

This year

Category

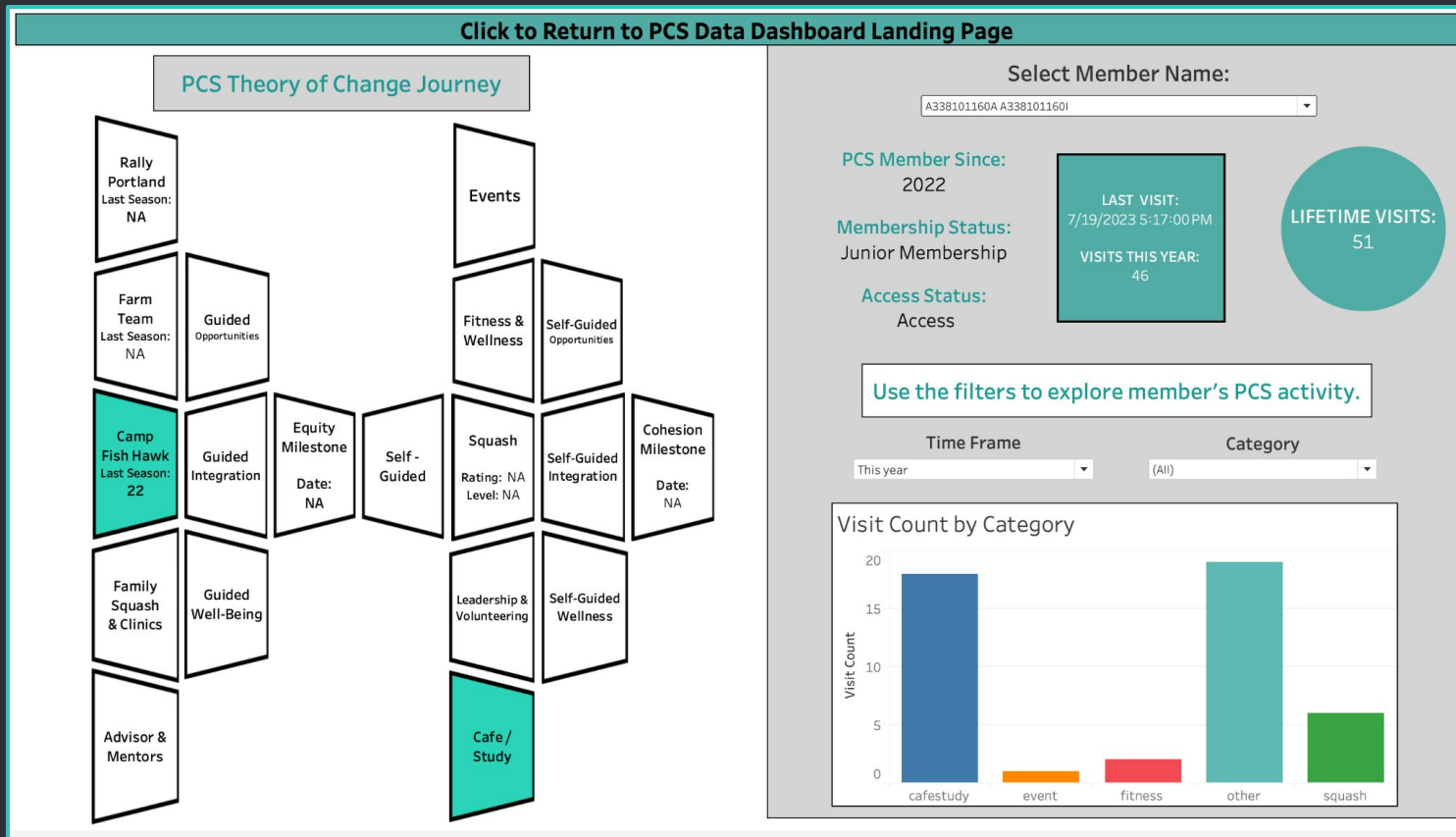
(All)

Visit Count by Category



Sample Individual TOC Dashboard for Member A337732162A*.

*Redacted name placeholder; will populate with a PCS member name when dashboard contains actual names.

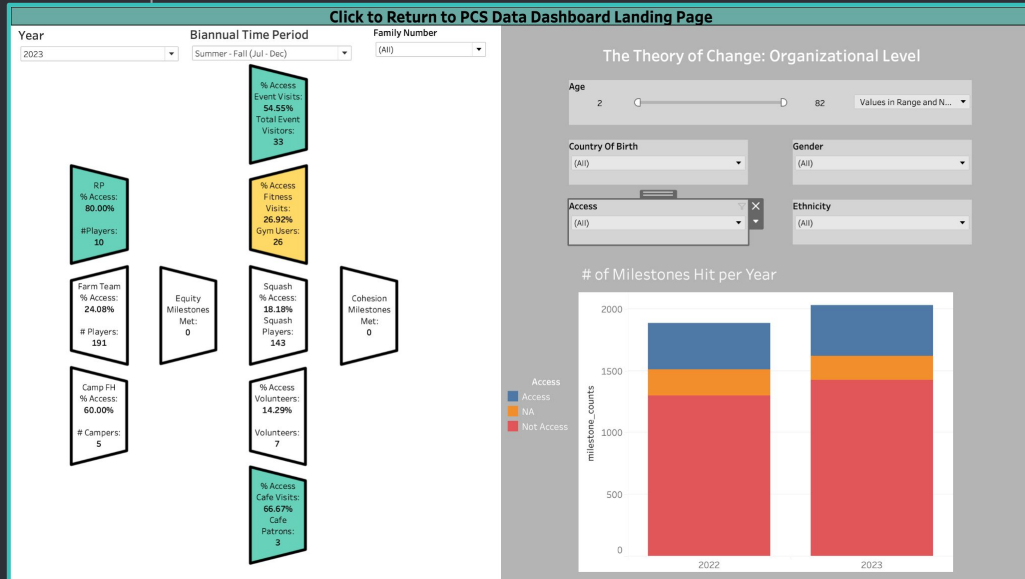


Sample Individual TOC Dashboard for Member A338101160A.*.

*Redacted name placeholder; will populate with a PCS member name when dashboard contains actual names.

Organizational TOC Dashboard

Designed to give a quick look at
ToC organizational goals



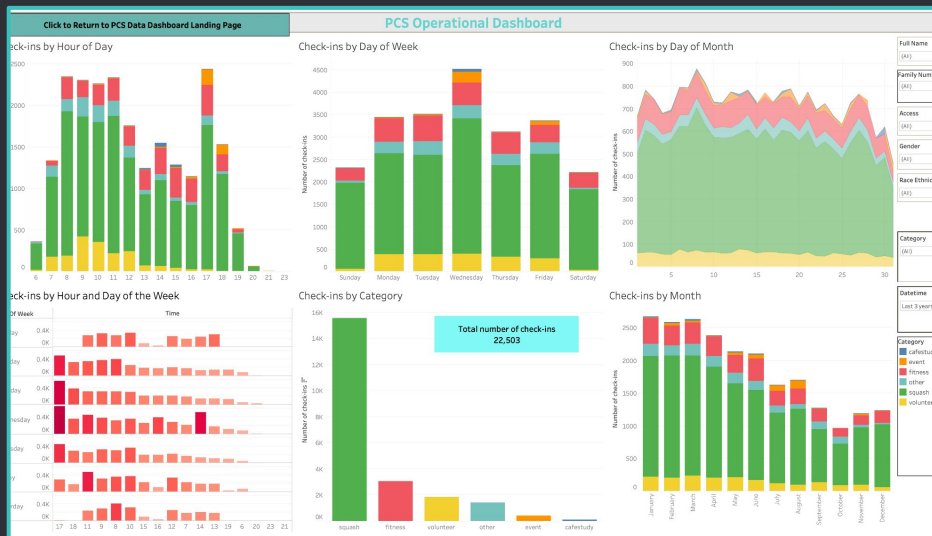
- Trapezoid color based on % Access goals:
 - Green: Goal Achieved
 - Yellow: 85% of goal achieved
 - White: less than 85% of goal achieved
- Metrics collected from iPad check in data and season record data
- Data organized into 6 month segments
 - Jan - Jun
 - Jul - Dec
- Year and Biannual Time Period filters affect % Access rates
- Demographic filters affect row counts

Operational Dashboard

Designed to explore facility usage and member activity engagement by member demographics, activity categories, and time-based variables.

Data populated from “iPad check-in”, “All Contacts”, and “Theory of Change” Insightly fields.

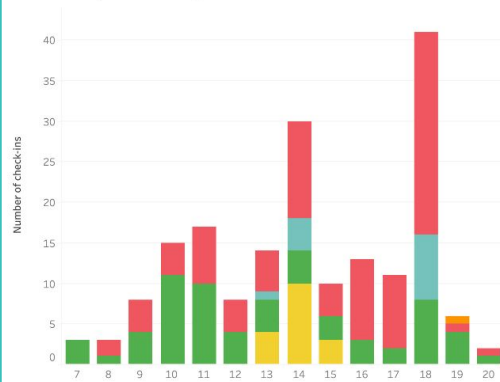
- PCS Operations
 - Shows comprehensive check-ins metrics and trends by different demographics, categories and timeframes.
- Member Engagement
 - Shows check-ins details for individuals and families.



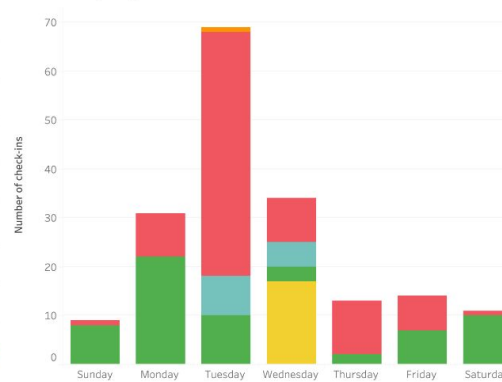
[Click to Return to PCS Data Dashboard Landing Page](#)

PCS Operational Dashboard

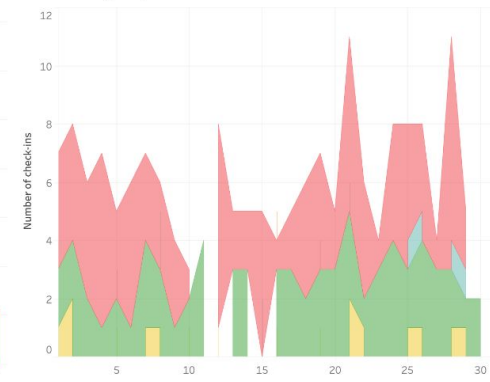
Check-ins by Hour of Day



Check-ins by Day of Week



Check-ins by Day of Month



Full Name
(All)

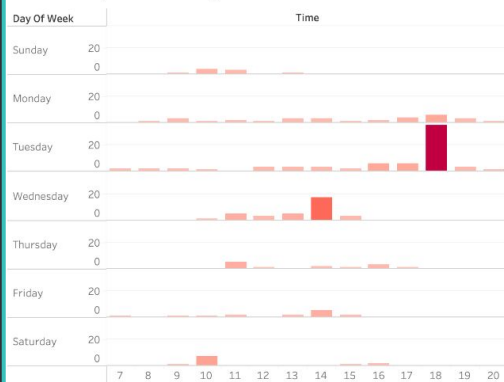
Family Number
7

Access
(All)

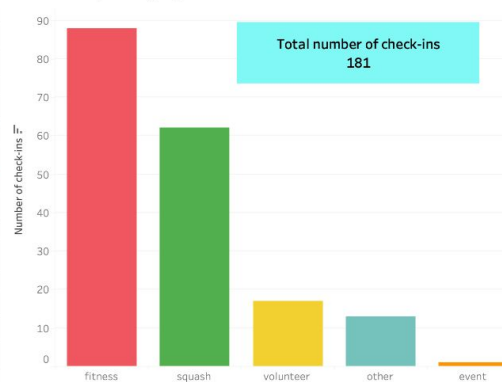
Gender
(All)

Race Ethnicity
(All)

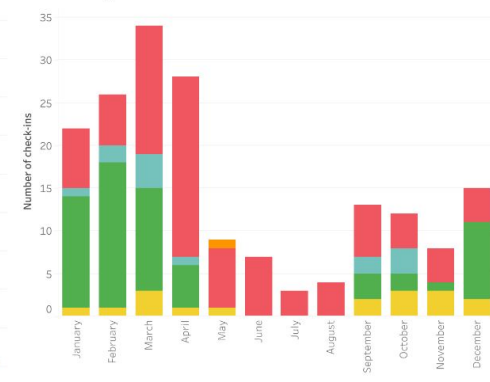
Check-ins by Hour and Day of the Week



Check-ins by Category



Check-ins by Month



Category
(All)

Datetime
Last 3 years

Category
☐ event
☐ fitness
☐ other
☐ squash
☐ volunteer

Sample Operational Dashboard for Family Number 7.



Sample Operational Dashboard for Member R154684194D* in Family 7.

*Redacted name placeholder; will populate with a PCS member name when dashboard contains actual names.

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DELIVERABLES

• WHAT WE'RE HANDING OFF

1. R script for code conversion
"PCS_data_conversion.Rmd"
2. Tableau workbook containing dashboards
"PCS_Dashboards_TeamC.twb"
3. Process Guide document with directions for populating dashboards with new data
"PCS_Process_Guide"

● TIPS FOR SUCCESS

● **Don't alter your data entry process!**

- Our code script is built upon your current data entry conventions. If those change, the code to convert the data files may no longer work.
 - As an example, you currently use semicolons to separate elements in the “Theory of Change” column in Insightly. If that separator changes, our code would not longer function.

● **Avoid accessing tabs other than the PCS Landing Page in Tableau.**

- Many of the elements on these tabs are quite sensitive and can be easily shifted or altered without meaning to do so.

• A Quick look at the R Script

```
43 ▾ ```{r}
44 cat_of_int <- c("volunteer", "squash", "fitness", "cafestudy", "event")
45 ▲ ```
46
47 Below are the goals set for each of the organisational level milestone.
48 - Guided and self guided milestone goals represent % Access.
49 - Equity and cohesion represent raw number of respective milestones achieved.
50
51 ▾ ```{r}
52 guided_access_milestone_goal <- 80
53
54 sg_access_milestone_goal <- 30
55
56 equity_milestone_goal <- 20
57
58 cohesion_milestone_goal <- 10
59 ▲ ```
```

The only part of the script you may want to interact with is shown here:

- “cat_of_int” (categories of interest) is a list that you can edit to capture specific activities in the iPad check in data. Anything not in this list will be converted to “other”.
- You can also edit the milestone goals. This will affect when trapezoids on the organizational tab change colors.

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CONTACT INFORMATION

• HOW TO CONTACT US

We're happy to provide troubleshooting help should you need it at any point in the future.

Our goal is that these dashboards can provide you valuable insights – not that they are burdensome to use!

Our Contact Information:

Nick De Diego: dediego.nick@gmail.com

Nicole Hewes: nicolehewes@gmail.com

Trang Tran: tran.tran@northeastern.edu