MONITORING MEMBER ENGAGEMENT AT PORTLAND COMMUNITY SQUASH

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AGENDA

- ○ Project Context

- ○ Our Approach

- ○ Dashboard Demos

- ○ Wrap Up & Next Steps
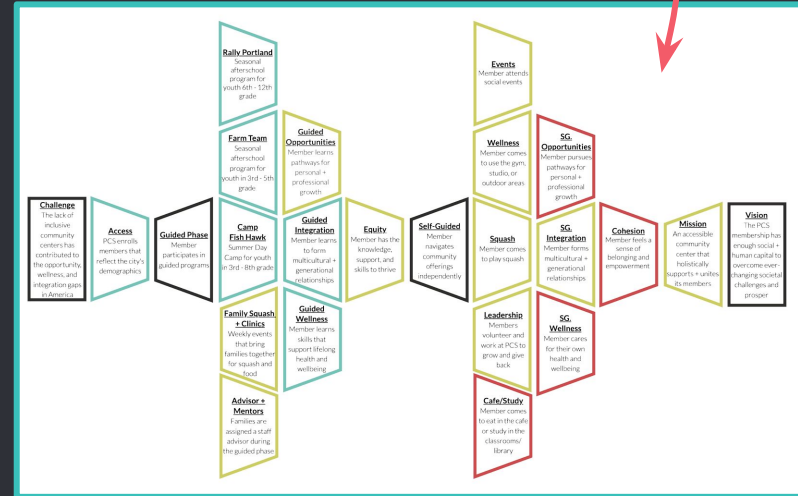
1 PROJECT CONTEXT

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

2 OUR APPROACH

PCS Data Dashboards

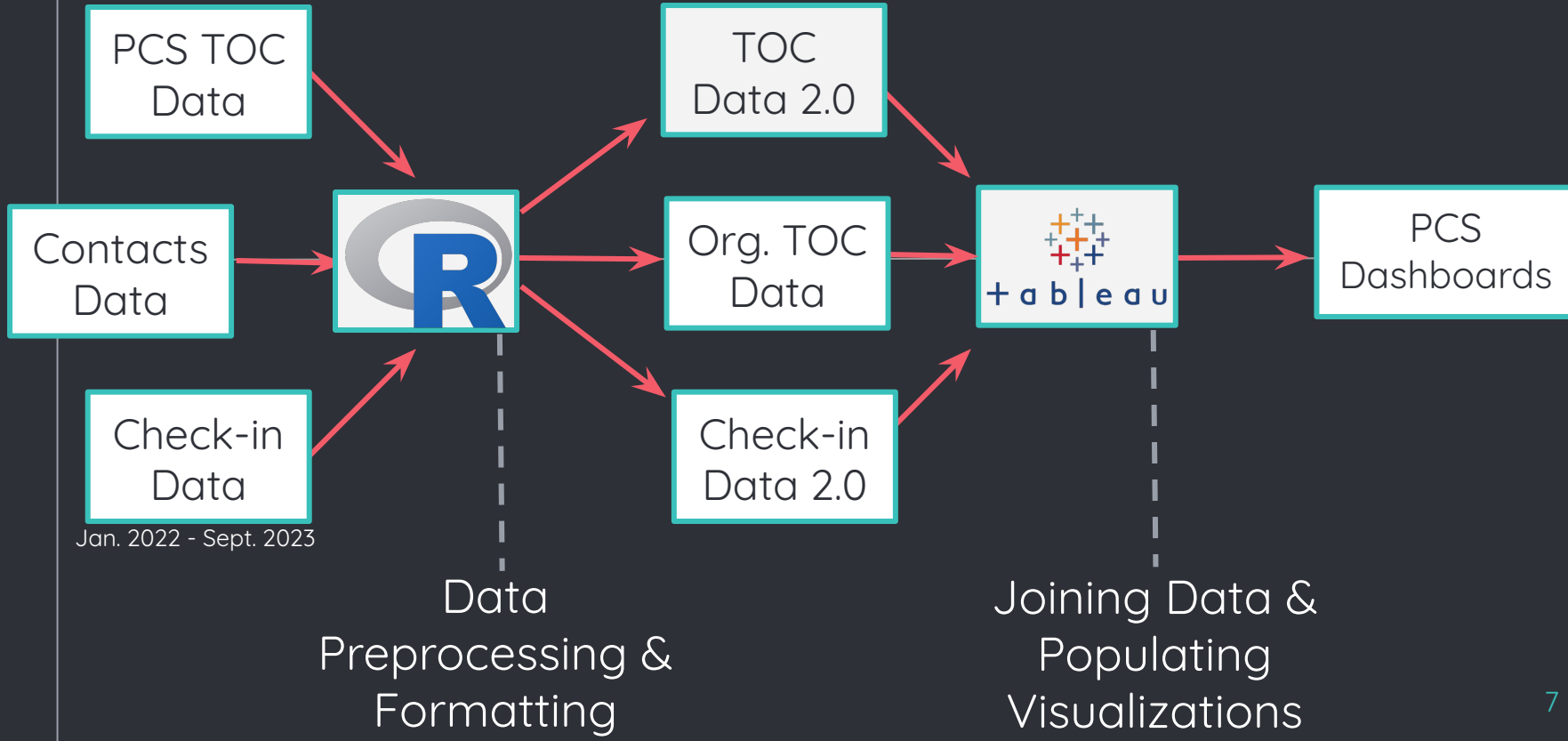Click to access a dashboard.

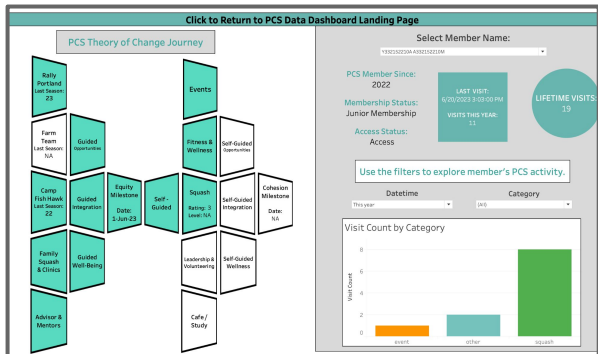| Operations Data | Individual TOC | Organizational TOC |

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
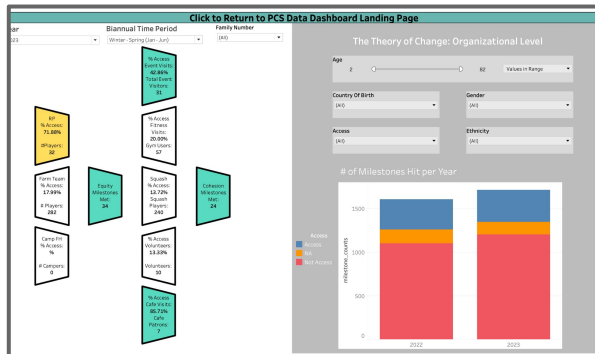
OUR PROCESS

PCS TOC Data

Contacts Data

Check-in Data

Jan. 2022 - Sept. 2023

TOC Data 2.0

Org. TOC Data

Check-in Data 2.0

PCS Dashboards

Data Preprocessing & Formatting

Joining Data & Populating Visualizations

OUR PRODUCT: A TRIO OF VIEWS

INDIVIDUAL MEMBER TOC	ORGANIZATIONAL TOC	OPERATIONAL METRICS
Provides a quick snapshot of ● TOC progress ● Membership details ● Recent PCS activity	Offers PCS-wide look at ● % Access membership ● Raw Participation numbers ● Filters by features of interest	Illustrates facility usage with ● Organizational-level check-ins metrics ● Check-ins details for individuals and families
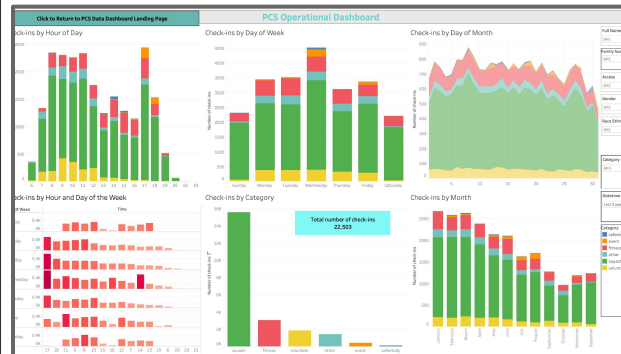
3 DASHBOARD DEMOS

4 WRAP-UP & NEXT STEPS

MOVING FORWARD

- Deliverables:
  - Tableau workbook with dashboard views.
  - Documented R script to help prepare future PCS data files to smoothly populate Tableau dashboards.
  - "Process Guide" document.
- Future Considerations:
  - Data formatting: consistency
  - Questions? New needs? We can help!