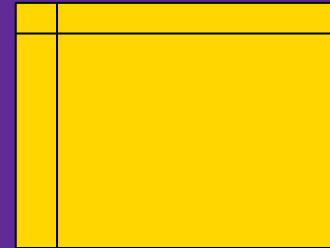
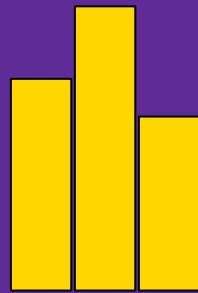
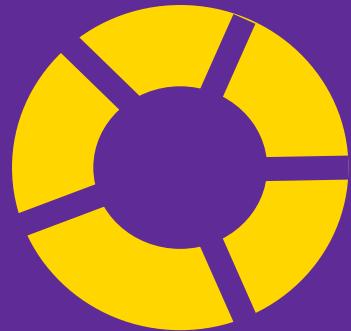


Advanced Data Management





Monica S. Flores

Leading digital product
development for teams
that make a positive difference

monicasflores.com

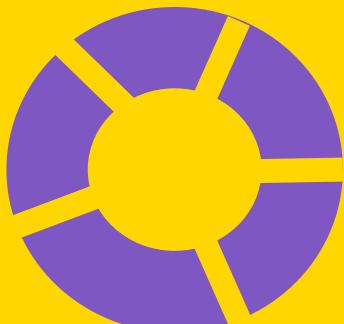
Web developer since 2004

Drupal focus

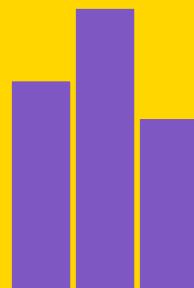
Passionate about sustainability,
social justice, diversity,
entrepreneurship, education,
and technology/science as tools
for positive social change.

Learning Objectives

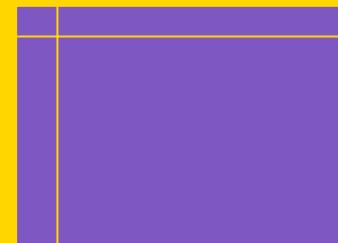
1.
Understand
Feedback
Loops



2.
Identify
Key
Performance
Indicators



3.
Design your KPI
Dashboard &
develop a Data
Collection Plan



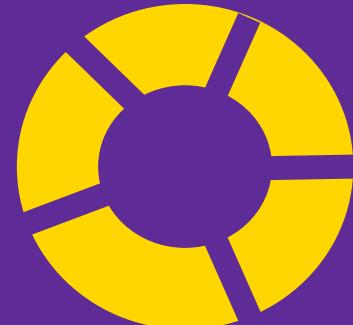


Here we go!

Learning Objective #1:

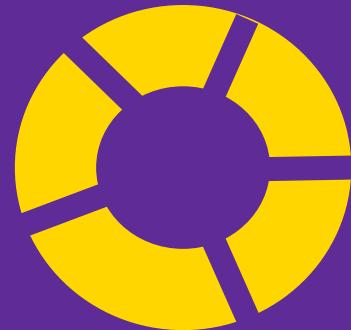
Understand Feedback Loops

Evaluate your organization's
current feedback loop of
design, collect, analyze, dialogue,
and course correct.



1.

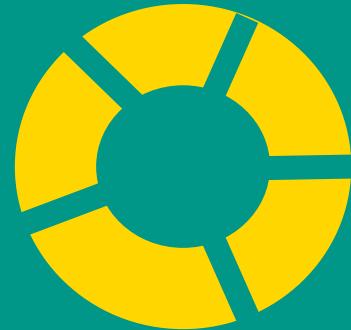
Understand Feedback Loops

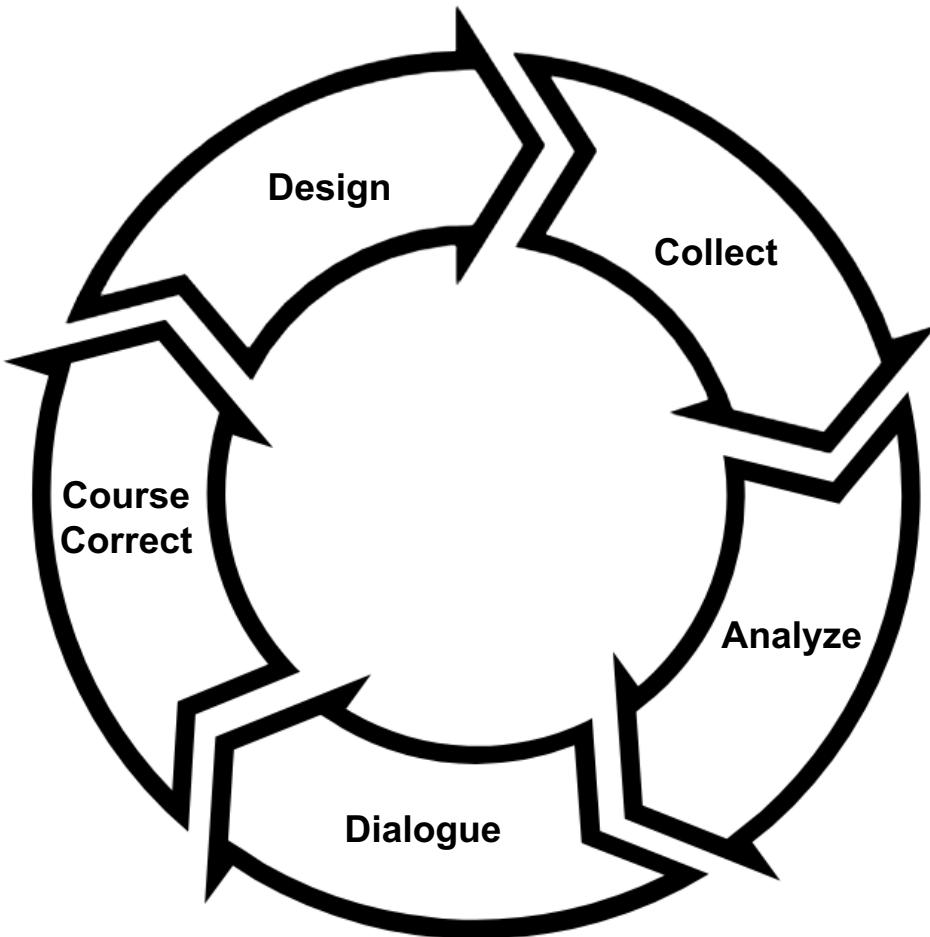


What is a feedback loop?

A continuous method to design desired data points, collect data, analyze the information collected, discuss learnings as a group, then act on feedback received

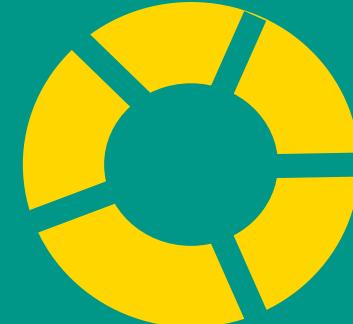
→ repeat





Why are feedback loops important?

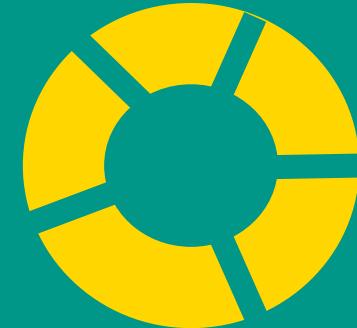
- Staff
- Board advisors
- Leadership
- Community stakeholders
- Constituents
- Members
- Clients
- Partners



How does your organization collect feedback?

"How are we doing?"

- Survey
- Feedback Form Sent Out
- Webform on live site
- Emailed
- Net Promoter Score
- Phone calls



Does your organization have a feedback loop:

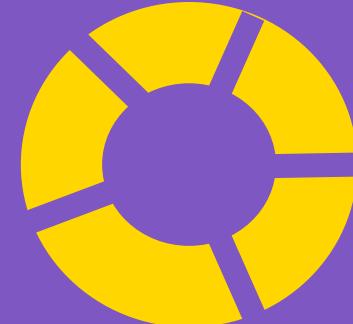
| | None | Somewhat | Well |
|-------------------|------|----------|------|
| Designs data | 0 | 1 | 2 |
| Collects data | 0 | 1 | 2 |
| Analyzes data | 0 | 1 | 2 |
| Dialogues on data | 0 | 1 | 2 |
| Course Corrects | 0 | 1 | 2 |

Your
score = _____

Report out your numbers

How does your organization articulate how it is fulfilling its mission, vision, and values?

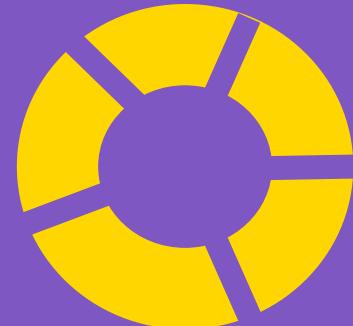
- Annual Report?
- Revenue and Expenditures?
- Outcomes? Outputs?
- Storytelling?



Match metrics to the mission

What are mission's **measurable components**?

- # of fellows selected
- # of participants
- media mentions of X program
- # of new donors

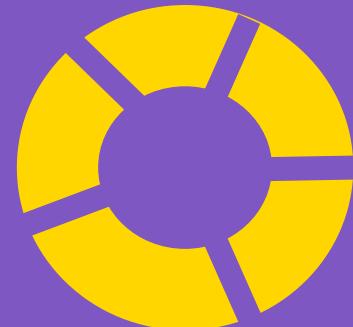


Align questions to goals

Determine organizational **goals**, and determine **survey questions** to align to those goals.

"Program has broad geographical reach"

→# of participants outside of
4\3 main cities: SF, NY, LA,



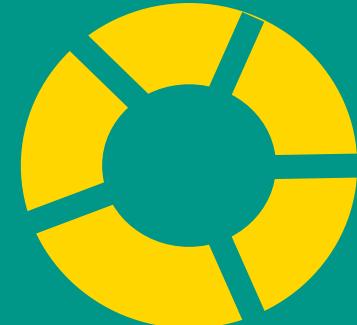
→Ask for Street Address, City, State, Zip

What are entity references?

Pieces of data is used by other pieces of data.

I.e. "Engagements" and "Participants"

"Janice Nguyen" → Course Participant
→ Donor
→ Focus Group Participant

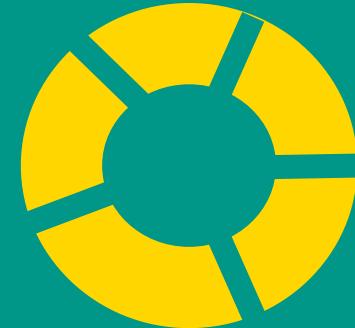


Why are entity references important?

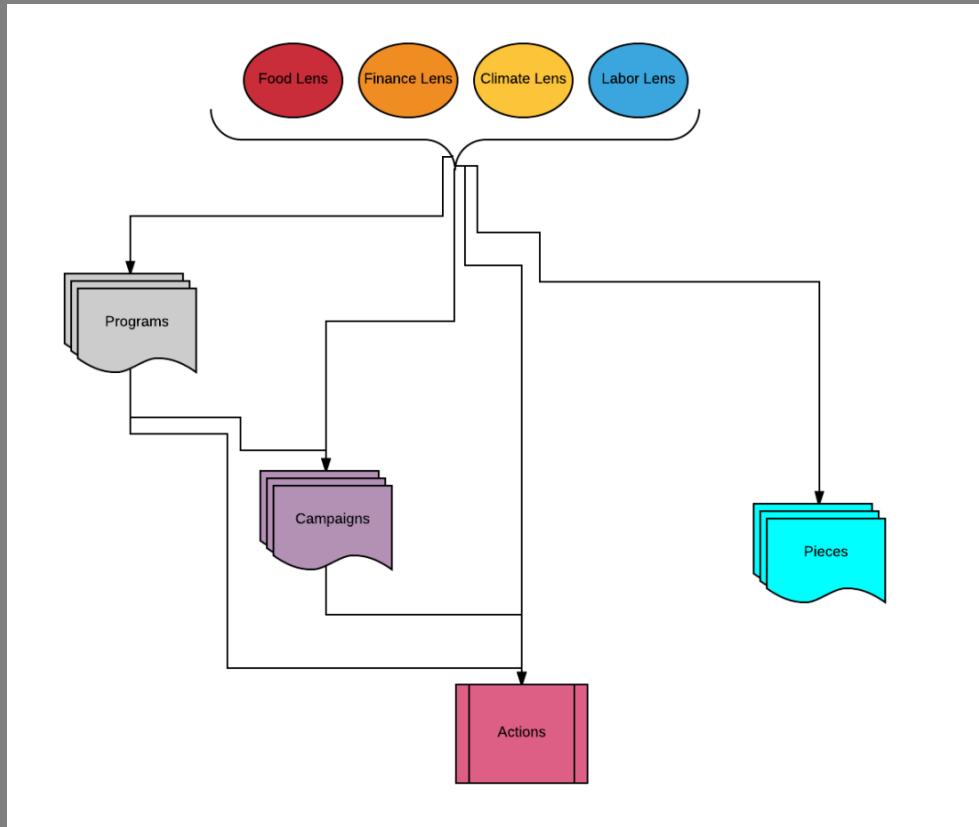
Update in one place:
changes reflect everywhere.

"Janice Nguyen" (participant record)

- Changes her last name?
- Joins another course?
- Makes a donation?
- Refers another participant?



How do others use entity references?



Most Content relates to one or more Lenses

Actions can be related to Programs and Campaigns

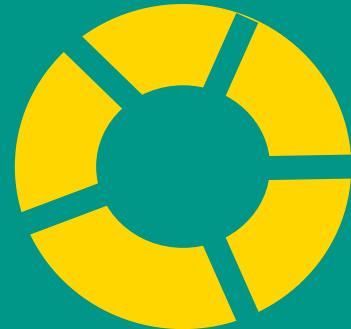
Campaigns can be related to Programs

Pieces can be related to any Lens

What is database normalization?

Database normalization is "the process of organizing the columns (attributes) and tables (relations) of a relational database to reduce data redundancy and improve data integrity."

Begin with the end in mind.



Why is database normalization important?

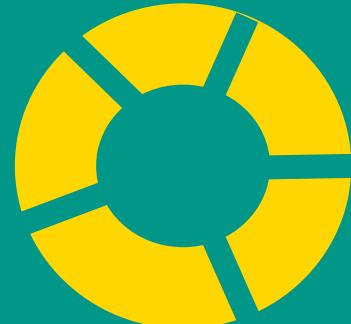
Example #1: Addresses - a text field vs split up?

Example #2: Amounts (numerical 1-100) vs.
Categories of Amounts (1-5, 6-10, 11-25, 26-100)

Example #3: Categorizations, lists

Members are one of 4 "types"

Easy to add a new type



How do others use database normalization?

Business Listing Categories ☆

+ Add term

NAME

- ❖ Action / Education / Organizing Groups & Resources
- ❖ Advertising / Marketing / Communication Services
- ❖ Air / Water Purification Products & Services
- ❖ Aromatherapy / Essential Oils
- ❖ Art Supplies
- ❖ Artworks / Crafts
- ❖ Baby Products & Service

NAME

- ❖ < \$1,000
- ❖ \$1,000 – \$10,000
- ❖ \$10,000 – \$50,000
- ❖ \$50,000 – \$100,000
- ❖ \$100,000 – \$250,000
- ❖ \$250,000 – \$500,000
- ❖ \$500,000 – \$1 million
- ❖ \$1 million – \$5 million
- ❖ \$5 million+

❖ Male

❖ Female

❖ Prefer not to answer

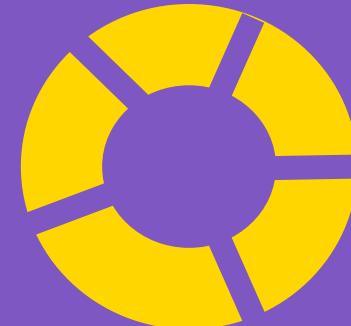
❖ Another Identity

NAME

- ❖ Idea
- ❖ Start-Up
- ❖ Growth
- ❖ Established
- ❖ Scaling

Survey Question Types

- Boolean
- Multiple Choice, Multiple Answer
- Multiple Choice, Single Answer
- Prioritization
- Scale



Sample Survey Questions

How timely are your questions answered by the CM product team?

Optional

1 2 3 4 5 6 7 8 9 10

Extremely Slowly Extremely Timely

How informative are the answers, if any, you receive from the CM product team?

Optional

1 2 3 4 5 6 7 8 9 10

Not at all Informative Extremely Informative

How satisfied are you with your interaction with the CM product team?

Optional

1 2 3 4 5 6 7 8 9 10

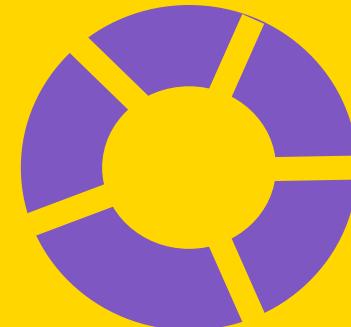
Extremely Unsatisfied Extremely Satisfied

What best describes your role within Changemakers?

Optional

- Project Manager
- Network Coordinator
- Media Manager / Writer
- General Changemakers Team
- Executive Team
- Decline to State

<https://docs.google.com/forms/d/e/1FAIpQLSdN44cUdKHSNg3nf5usPkSEvxmKQ3ogylqPg9e9XDqDVarmJg/viewform>



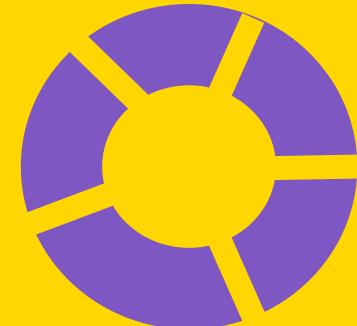
Sample Survey Questions

Pulse Questions

1 = Strongly Disagree, 2 = Disagree, 3 = Neither Agree nor Disagree, 4 = Agree, 5 = Strongly Agree

| | 1 | 2 | 3 | 4 | 5 | Not applicable |
|--|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|-----------------------|
| 1. Feel well informed | <input type="radio"/> |
| 2. Opportunities to learn and grow | <input type="radio"/> |
| 3. Opportunities to contribute to decisions that affect me | <input type="radio"/> |
| 4. Comfortable voicing my opinion | <input type="radio"/> |
| 5. Feel genuinely appreciated | <input type="radio"/> |
| 6. Positive Friendly Work Environment | <input type="radio"/> |
| 7. Feel supported by my manager | <input type="radio"/> |
| 8a. We have a participatory workplace | <input type="radio"/> |

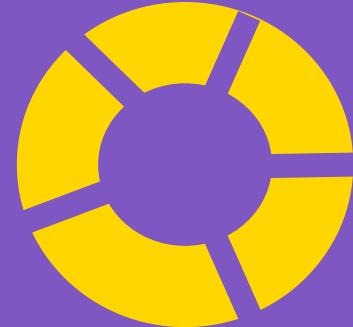
https://docs.google.com/forms/d/e/1FAIpQLSeNF-DpF7ccP5xrytimt7DnBKHHG3p9w2s0DI_9kUzKTS_x6A/viewform



Collecting Data

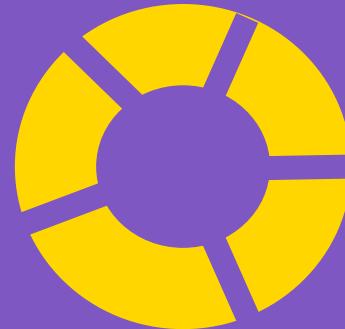
What mechanisms exist for collecting data?

- Paper forms
- Google Forms
- Forms embedded on your website
- Surveymonkey



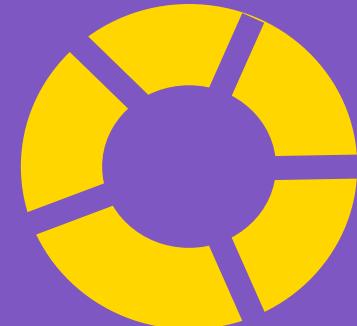
Analyzing Data

- Check against last year.
- Identify trends.
- Any "weighting" needed?



Engaging in Dialogue

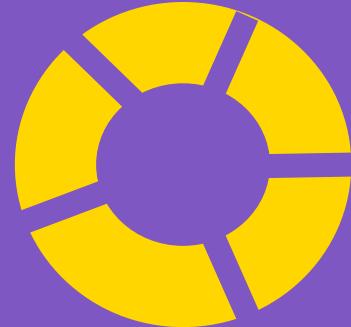
- Use survey results to support or refute current strategies.
- Use data-driven decision-making as a tool for shared understanding.
- Gather feedback on incomplete metrics.



Course Correction

Based on feedback, change the procedure.

- Let participants know you've changed
- Re-invite feedback submission
- Learn and share internally



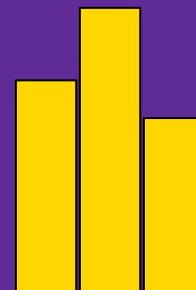


Great work!

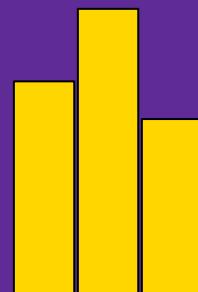
Learning Objective #2:

Identify Key Performance Indicators

Identify, assess,
and prioritize your current
key performance indicators.

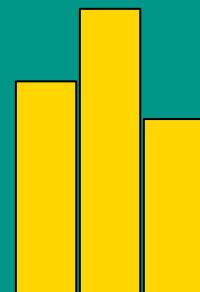


2. Identify Key Performance Indicators



What is a KPI?

A **Key Performance Indicator** is a measurable value which your organization uses in order to understand **how effectively** the organization is achieving its objectives.

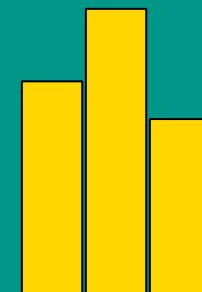


Why are KPIs important?

SMART (Specific, Measurable, Achievable, Realistic, Time-bound)

SHARED with key stakeholders

TRACKED over time



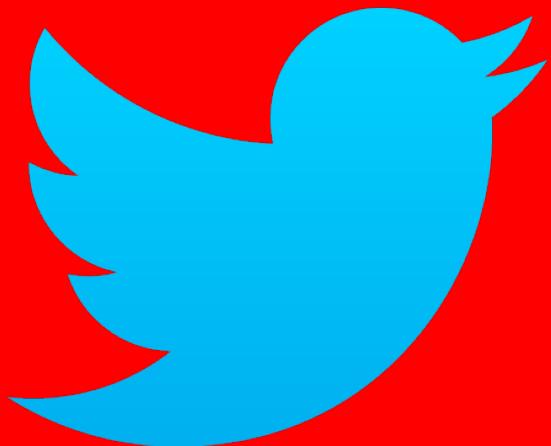
How do other organizations use KPIs?

| Goals | | KPIs | | | |
|--|---|-------|---|--|-------------|
| Goal | Outcome | Team | Measure | Instrument | Frequency |
| Overall Team leaders demonstrate strong Teamwork and entrepreneurial leadership | Team leaders demonstrate strong Teamwork | eTeam | % Team KPI targets achieved | manual analysis | Quarterly |
| | | eTeam | % "Five Dysfunctions of a Team" resolved by Directors (12+ on scale 3-15) | Self- Assessment Survey: Team Directors | Semi-Annual |
| | Team Directors demonstrate entrepreneurial leadership | eTeam | # Team Directors that achieve Larger Organization Level increase by 9/30/17 | manual analysis | Annual |
| | Team Product Leads are supported in delivering strategic and sustainable impact | eTeam | % Product-related goals achieved | manual analysis | Quarterly |

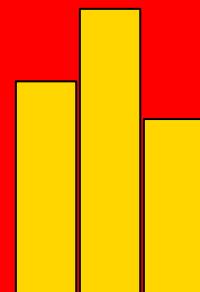
How do other organizations use KPIs?

| | | | | | |
|---|--|-----------------------|--|--|-------------|
| <p>Overall Team engagements deliver strategic and sustainable impact</p> | <p>Team partners are satisfied that they received a valuable return on the resources (funding, brand, time, connections, etc.) they invested in the engagement</p> | Engagement Management | % engagements renewed (within 1 year from end date to start date) | manual analysis | Quarterly |
| | | Engagement Management | # funding partners who renew (within 1 year from end date to start date) | manual analysis | Quarterly |
| | | Engagement Management | # funding partners who refer (within 1 year from end date) | manual analysis | Quarterly |
| | <p>Team Engagement Managers demonstrate strong Teamwork</p> | Engagement Management | % Team Engagement Management targets achieved | manual analysis | Quarterly |
| | | Engagement Management | % "Five Dysfunctions of a Team" resolved by Team Engagement Managers (12+ on scale 3-15) | Self-Assessment Survey: Team Engagement Managers | Semi-Annual |
| | <p>Team Engagement Managers demonstrate entrepreneurial leadership</p> | Engagement Management | # Team Engagement Managers that achieve Larger Organization Level increase by 9/30/17 | manual analysis | Annual |
| | <p>Team Engagement Management Team is efficiently allocated to engagements</p> | Engagement Management | % Engagement Management Team actual utilization rate | Harvest Forecast | Quarterly |
| | | Engagement Management | % Engagement Management Team forecasted utilization rate | Harvest Forecast | Quarterly |

Tweet it: Which current KPIs do you track?



[https://twitter.co
m/intent/tweet?t
ext=@ntenorg+
@monicaflores
+One+of+our+K
PIs+is](https://twitter.com/intent/tweet?text=@ntenorg+@monicaflores+One+of+our+KPIs+is)



Website analytics

<http://www.google.com/analytics>

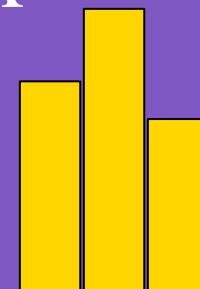
- Figure out Popular Entry Pages

- Measure Funnels, i.e.

Signup Page A → Thank you Page A

- Understand best "ask" for donations

- Understand best "asks" for signups



Analytics Review

https://www.greenamerica.org
www.greenamerica.org ▾

1 3

SEARCH Search reports and help

HOME

CUSTOMIZATION

Reports

REAL-TIME

AUDIENCE

Overview

Active Users

Lifetime Value BETA

Cohort Analysis BETA

User Explorer

▶ Demographics

▶ Interests

▶ Geo

SAVE SHARE EXPORT INTELLIGENCE

Jul 18, 2017 - Sep 16, 2017
Compare to: May 18, 2017 - Jul 17, 2017

All Users +0.00% Sessions

+ Add Segment

Overview

Sessions vs. Select a metric

Hourly Day Week Month

Jul 18, 2017 - Sep 16, 2017: Sessions

May 18, 2017 - Jul 17, 2017: Sessions

15,000

7,500

Jul 22 Jul 29 Aug 5 Aug 12 Aug 19 Aug 26 Sep 2 Sep 9

57.16% 33.64% 37.09%

140,514 vs 89,410 101,030 vs 75,596 233,677 vs 170,455

New Visitor Returning Visitor

Jul 18, 2017 - Sep 16, 2017

34.1%

This screenshot shows the Google Analytics Audience Overview report for the website greenamerica.org. The left sidebar includes links for Home, Customization, Reports, Real-Time, Audience (with sub-links for Overview, Active Users, Lifetime Value, Cohort Analysis, User Explorer, Demographics, Interests, and Geo), and a gear icon. The main dashboard displays an 'Overview' section with a line chart comparing sessions from July 18, 2017, to September 16, 2017, against the period from May 18, 2017, to July 17, 2017. The chart shows significant peaks in sessions around August 26 and September 9. Below the chart, three summary metrics are shown: Sessions (57.16%), Users (33.64%), and Pageviews (37.09%). At the bottom right, a pie chart indicates that 34.1% of visitors are new and 65.9% are returning.

How do other organizations use analytics?

| Old website | New website |
|--|--|
| New Online Donations April 2, 2017 - June 14, 2017 (73 days) \$12,497 | New Online Donations June 16, 2017 - August 28, 2017 (73 days) \$22,075 76.64% increase |
| Sessions 141,203 | Sessions 2.64% increase 144,930 |
| Avg. Session Duration 00:01:12 | Avg. Session Duration 2.25% increase 00:01:13 vs 00:01:12 |

Align data to your organization's purpose

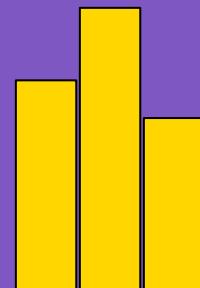
How well does organization achieve its mission?

→ Fund-raising performance?

→ Membership rate of growth?

→ Staff satisfaction?

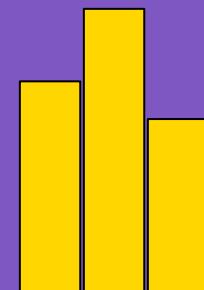
→ Number of clients?



Continuous assessment

Work data collection into your schedule

- Upon client intake (pre-)
- Participation feedback (during)
- After services (post-)
- Staff assessment (regular reviews)



Prioritization Grid

Beverly Ryle's Web Prioritizing x

indicate preferences or use '+' button to increase ranking

Prioritize Blank Form Print Results

The prioritization grid displays 10 items arranged in a descending staircase pattern from top-left to bottom-right. Each item has a small box with a plus sign (+) to its right, indicating it can be ranked higher.

| Rank | Item |
|------|----------------------|
| 1 | Apple pie |
| 2 | Biscotti |
| 3 | Brownies |
| 4 | Cheesecake |
| 5 | Fresh fruit |
| 6 | Ice cream |
| 7 | Key lime pie |
| 8 | Sorbet |
| 9 | Strawberry shortcake |
| 10 | Tiramisu |

Key lime pie

Ice cream

Fresh fruit

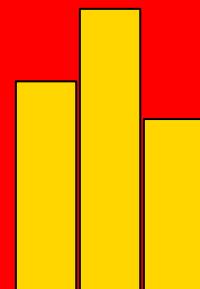
Cheesecake

**Apple pie
Brownies
Strawberry shortcake**

Biscotti

Sorbet

Tiramisu



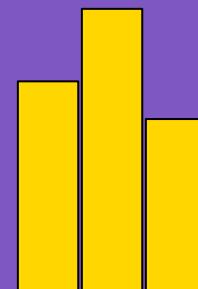
Kaizen - Continuous Improvement

Using existing data and making small adjustments for greater efficiency/delivery

- Eliminate Waste
- Create Continuous Flow

→ How many boxes fit in truck?

→ How long does it take to pack a box?



The contents of each box feeds one family
for three days.



<https://youtu.be/KtTQff7Ufw?t=1m51s>



0:53 / 6:21



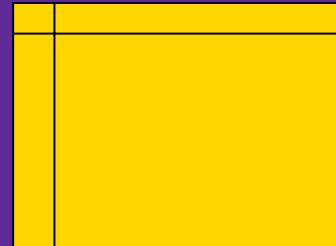


Fantastic!

Learning Objective #3:

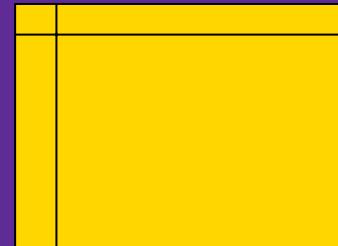
Design your KPI Dashboard

Design a dashboard to understand
and share your key performance
indicators with stakeholders.



3.

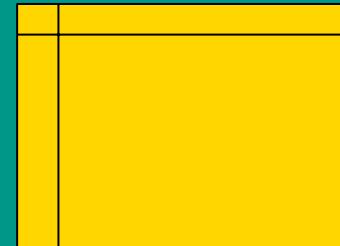
Design your Key Performance Indicator Dashboard



What is a dashboard?

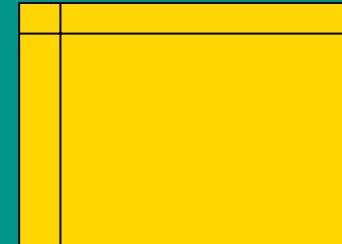
A visual representation: layout of information

- Matches overall KPIs
- Used by various stakeholders
- "Snapshot" of the organization
- Used for decision-making



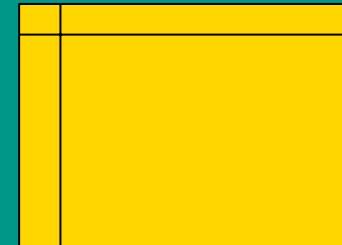
Why is a dashboard important?

- Transparency
- Accountability
- Timeliness/Deadline
- Unifying review around data



Who may view your dashboard?

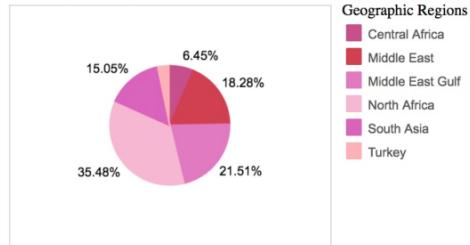
- Staff
- Board advisors
- Leadership
- Community stakeholders
- Constituents
- Members
- Clients
- Partners



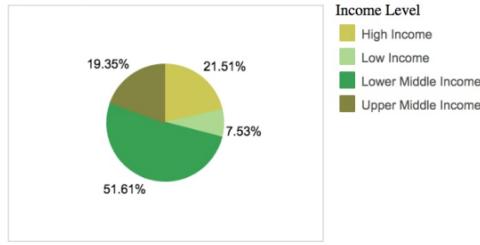
How are other organizations using dashboards

Where Are They From?

b. Geographic Regions



c. Income Level

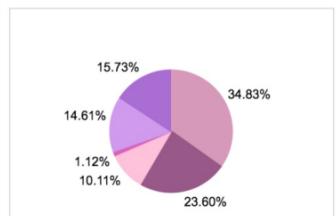


What Do They Focus On?

d. Innovation Pattern:

Barriers

Click on the chart to learn more



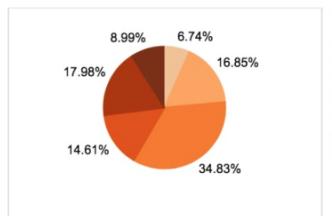
Barriers

- Deficiency of targeted ...
- Limited entrepreneurship...
- Restricted access to ca...
- Build business confide...
- Recruiting "Best Practi...
- Other

e. Innovation Pattern:

Design Principles

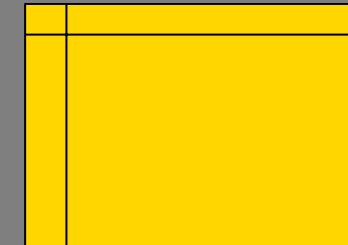
Click on the chart to learn more



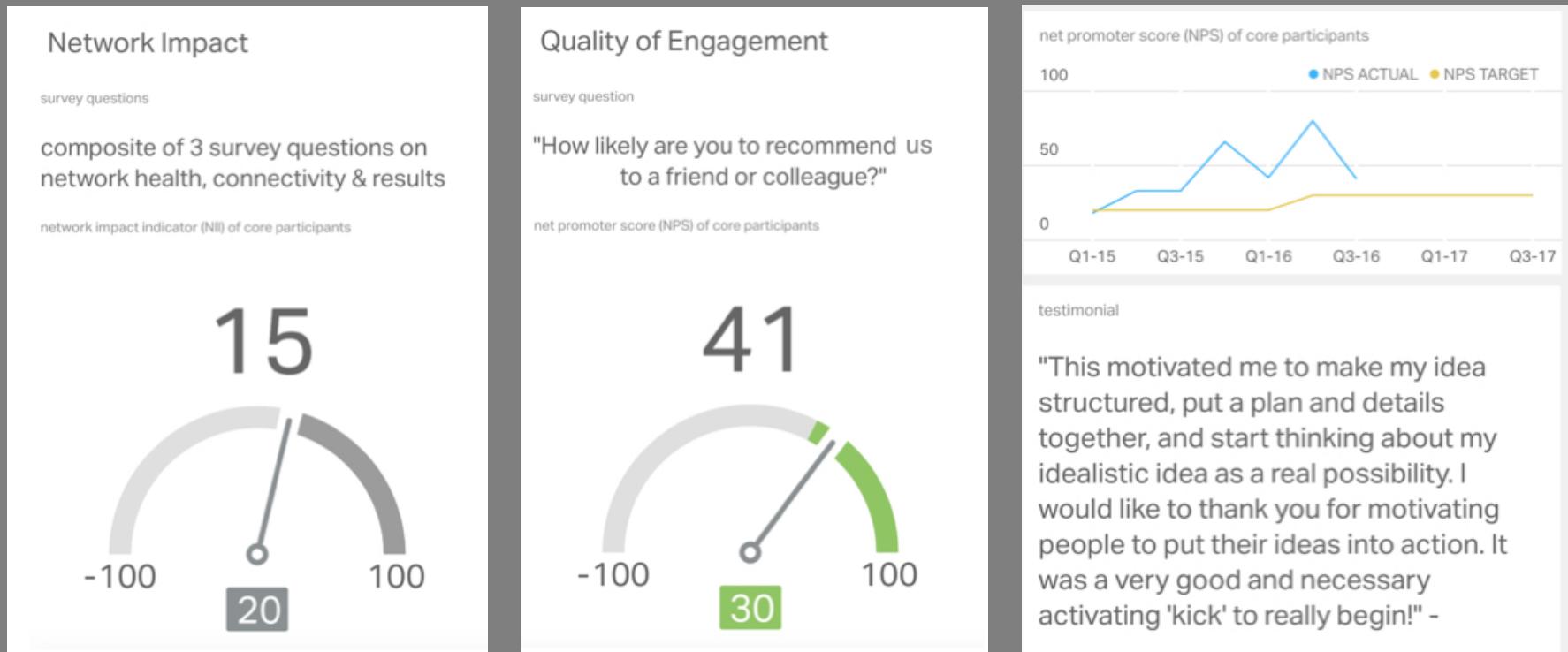
Design Principles

- Build business confidence
- Customize technology
- Hands on learning
- Partner with complementary b...
- Practical education and essenti...
- Other

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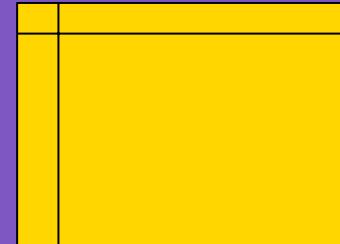


Sample Dashboard



Using Pulse Surveys

- Consider using an ongoing survey to ascertain the "Pulse" of the organization
- Consider combining the results of your 'Pulse' with your KPI progress report
- Report out regularly



Sample Pulse Implementation

In May 2016, Green America staff conducted our first “pulse survey” to get a quick read from staff on how the organization is doing across a range of issues. The survey, which contains the same set of questions each quarter, will allow us to see over time key trends, progress, lapses, as well as general comments from staff on their Green America work-life experience.

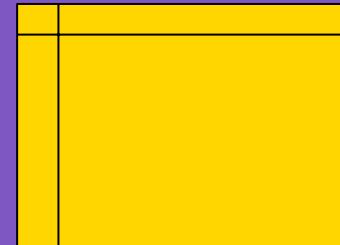
The survey, which is optional and anonymous, asks staff how strongly they agree or disagree with a variety of statements, such as:

- I feel well-informed about important organizational decisions.
- My job gives me opportunities to learn and grow.
- I feel comfortable voicing my opinion.
- I think the organization is headed in the right direction.
- In practice, the participatory workplace is functioning well
- I am satisfied with my pay.
- I am satisfied with my benefits.

We have now conducted six surveys, with typically 21-23 staff participating. Staff meet (optionally) to review the feedback each quarter; the executive team (CEO/president and executive co-directors) also review the feedback as does the Coordinating Team (department directors). Equally important to the trends on these key questions are the thoughtful comments that accompany each of the questions.

Data collection

- Financial Reporting
- Impact Reporting
- Staff Reviews
- Partner Renewal Rates
- Client Satisfaction



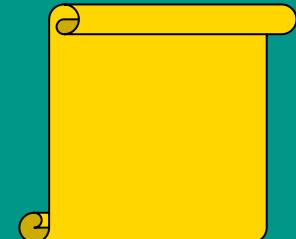
What is a data collection plan?

Written documentation of how the organization will work with data:

Who "owns" different measurements?

Which permissions are needed?

When to build into routine social media?

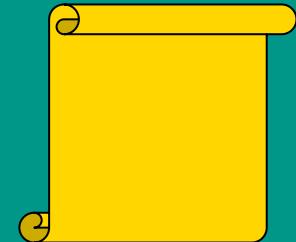


Why is a data collection plan important?

Document alignment between different teams.

Understand and show where there are gaps,
duplicates, or inefficiencies.

Spell out responsibilities:
who, what, where, when, how, why?

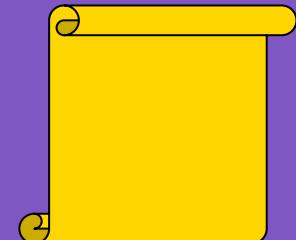


Sharing knowledge

Make an effort to disseminate collected data

Internally understand best practices,
successes & failures

Publicly share → to blog or white paper





Fantastic!

Conclusion

Questions & Answers

Continue the conversation

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