Program Data Management with Salesforce

Kim Karesh, Nashville Adult Literacy Council
September 26, 2019
Is this session for me?

- No.
  - I’m not sure if data really matters. (The feature session on Program Outcomes might be a better fit for you.)
  - I don’t know anything about data management. (This session dives into some details that might bore and/or overwhelm you.)
  - I have a lot of money. (You’ll probably prefer to hire someone to do this for you.)
  - I’m looking for a quick and easy fix. (This takes a long time and is a lot of work.)

- YES!
  - I think program outcomes are important. I understand a little about data management and I’ve heard of Salesforce. I would like to learn the mid-level steps that the Nashville Adult Literacy Council (NALC) used to go live in Salesforce without very much money.

- Sure.
  - I’m somewhere in the middle and curious about this conversation.
Disclaimers and Agreements

• I am not an expert in Salesforce.
• I *am* an expert on NALC’s implementation with Salesforce. I am sharing our story in the hopes that it is helpful to you.
• Therefore, attendees will agree to:
  • Use what is helpful, and
  • Kindly disregard anything that isn’t
At the end of this session, attendees may feel slightly fearful about the implementation process, yet inexplicably enthusiastic about improved program management through technology.
Let’s Share!

• Name
• Organization
• Expertise (i.e. teaching, data, management, etc.)
• Do you use: Paper, Excel, Salesforce, or something else?
• How much experience do you have with Salesforce?
Design Process Overview

Phase 1
- Planning: Understand opportunity area, organizational capacity, and feasibility

Phase 2
- Creating: Design for user needs in a collaborative and participatory manner
- Learning: Understand users’ existing behaviors, needs, and expectations
- Measuring: Use data to inform a new cycle of creation and testing until you have a refined and validated solution that is ready to scale
- Testing: Rapidly test and iterate solutions at multiple levels (products, services, processes)

Phase 3
- Scaling: Scale successful prototypes that have performed well over several cycles of iteration

Multiple Rounds of Iteration
Day 1: Our database is broken
Get Input from the Users

Joseline Adult Literacy Council
"Database" User Stories for Salesforce

Directions:
Define "Who, What, Why and How"
"I need this because and I do these things to make it happen"

Then determine the things that validate that it works.
"I confirm this works because I got the expected result"

Who: Kim Kanish
Role/Title: CEO, Grant Writer/Reporter and Fundraiser

User Story One:

Requirement (What)
Watch Key Performance Indicators (KPIs) and report to the board in a visually dynamic way.

User Story (Why)
As the leader of the organization, it is my responsibility to ensure we are on track to hit our strategic goals if we fall off pace, I can reallocate resources to hit our goals and/or give adequate notice to our funders.

Steps/Tasks/Options/Methods (How)
Option 1: Create a memorized report available for daily review and monthly reports. Ideally, I’d be able to see if we are “on pace” for the year, perhaps by entering expected milestones by the time of the report and getting a dashboard red/yellow/green visual to compare (see picture to right). Sample data points include:
- # of Unique Students (each student counted one time only)
  - Enrolled this fiscal year
  - Total
- # of Students by Delivery Method (students may be counted more than once)
  - Citizenship Classes
  - ELL
    - Classes
    - 1:1
    - Start Now

- # of Goals Achieved
  - Standardized Tests
  - Personal Goals

- Hours of Instruction
  - ELL Classes
  - Citizenship Classes
  - Start Now
  - 1:1

- Student Demographics
  - Race
  - Age
  - Gender
  - Poverty Level

- Tutor Demographics
  - Race
  - Age
  - Gender

- # of students on waiting list

- Student turnover rate

Conclusions/Acceptance Criteria
Present all of the above data visually. For example:
Draw a Map of How Your Work Flows
Get Help with Data Requirements
## Map Old Data to New Data

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<th>Mailing Zip/Postal Code</th>
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**Other Notes**

New

Change to State House District and don’t migrate this. Data entry was confused and inconsistent between house/senate.

Write-In

Here are the options we want to have in the drop-down: Religious Organization, Employer, Internet, Email, Social Media, Newspaper, NPR, HON, Friend/Relative, Volunteer Program Match, FiftyForward, School, Television, Event, Other

**Examples**

- 37209
- 615-298-8458
- 52

Free Text

See LookupHowHeard
Import Old Data into the New System

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# Implement the System

- **Name:** Kim Karesh
- **Contact Record Type:** Volunteer
- **Gender:** F
- **Phone:** 615-427-3291
- **Date first volunteered:** 7/14/2016
- **Contact Details:**
  - **Date first volunteered:** 7/14/2016
  - **Contact Status:** Inactive
  - **Inactive Date:** 12/5/2018
Support Adoption

**Course Enrollments (3+)**
- **Enroll-34022**
  - Program:
  - Enrollment Status: Active
- **Enroll-01485**
  - Program:
  - Enrollment Status: Inactive

**Assessments (3+)**
- **Assessment-26801**
  - Goal Type: Education (for adult learner)
  - Date Goal Met: 6/28/2018
- **Assessment-25573**
  - Goal Type: Education (for children)
  - Date Goal Met: 10/9/2017

**Hours (3+)**
- **Hours-40773**
  - Session Date: 7/1/2018
  - Hours Attended: 6
  - Program Type: One on One
- **Hours-40774**
  - Session Date: 6/1/2018
  - Hours Attended: 4
  - Program Type: One on One

**Relationships (2)**
- **R-004268**
  - Related Contact: Kristin
  - Matched Date: 3/20/2021
  - Status: Current
- **R-003647**
  - Related Contact: Kim Karesh
  - Matched Date: 2/2/2017
  - Status: Former
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### Hours (6+)

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[View All](#)

### Assessments (6+)

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## Assessments

18 items · Sorted by Assessment Date · Updated a few seconds ago

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Date Goal Met: 2/20/2018

Comfort Scale Achieved: [ ]

Last Modified By: Sarah Coode, 5/4/2018 2:13 PM
Build Reports: Round One

- You can choose any field to appear in your report
- You can create filters to do your sorting
Remember this?

**Planning**
Understand opportunity area, organizational capacity and feasibility

**Learning**
Understand users’ existing behaviors, needs and expectations

**Measuring**
Use data to inform a new cycle of creation and testing until you have a refined and validated solution that is ready to scale

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Design for user needs in a collaborative and participatory manner

**Testing**
Rapidly test and iterate solutions at multiple levels (products, services, processes)

**Scaling**
Scale successful prototypes that have performed well over several cycles of iteration

**Multiple Rounds of Iteration**
Build Reports: Round Two

- You can choose any field to appear in your report
- You can create filters to do your sorting
Run Reports
Create Dashboards

Students Served Current Fiscal Year

649

New NALC Students Current Fiscal Year

183

Student Age Demographics

Record Count

18 - 30 years old
31 - 44 years old
55 - 64 years old
75 - 84 years old

649

Student Race Demographics

Record Count

White/Caucasian
Hispanic/Latino
Black/African-American
Asian
Other

649

Student Poverty Level Demographics

Record Count

Under 200% Poverty Level

389

Student Gender Demographics

Record Count

Female
Male

Gender

435

214

Personal Goals Achieved by Type

Record Count

Education (for adult learner)
Work
Education (for children)
Health
Community Engagement
Citizenship
Financial

0
10
20
30
40
50
60
70
80

81
71
50
18
15
13
11

282

110

# of Personal Goals Achieved

# of Standardized Test Improvements
Dashboards Are Fun...
Metro_Students Served and Assessed
Goal FY19 = 80
395
View Report (Metro_Students Served and Assessed)

Metro_Students Matched and Assessed
Goal FY19 = 24
166
View Report (Metro_Students Matched and Assessed)

Metro # of Parents w/Goal to Help Children in School
Goal FY19 = 76
76
View Report (Metro_# Parents w/Comfort Scale)

Metro_Students Achieving Any Goal
Goal FY19 = 80% of Students Served
243 (64%)

Metro_Students Matched and Assessed
Goal FY19 = 30% of Students Served
166 (44%)

Metro_Parents w Comfort Scale Achieved
Goal = 50% Parents Served w/CS Goal
42 (58%)
Cost: Less than $4,000
Timelines

• Six months for requirements
• Six more months to implement
• Six more months for reports
• Six more months for dashboards

• It took two years. And we’re not done yet.
It’s worth it.

• Improved work flow (i.e. accessing student information)
• Automatic reporting saves an estimated 500 hours/year
• Employee satisfaction
  • One danced
  • One cried
• Community conversation
• Funder attention
Moving from WHAT to WHY?