



SOS Submission Title: Data-Driven Chapter Governance
(including Wild Apricot, Power BI, and business intelligence dashboards)

Chapter Name: Southeastern Wisconsin Chapter

Submission Date: 3/1/2022 ChIP Code: Chapter Location: Milwaukee, WI Chapter Membership Size: Medium	Contact for this Submission: Colin Hahn Email Address: colin.hahn@gmail.com Board Position: Past President Phone Number: 414-897-6174 Chapter Website URL: sewi-atd.org
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When responding to each area, please provide information about who, what, when, how, why, where, and to what degree where appropriate. Also, please be specific and provide enough detail that would allow a leader from a different chapter to pick up this document and mimic your effort.

1. Description of Effort (What did you do?): Data-Driven Chapter Governance (including Wild Apricot, Power BI, and business intelligence dashboards):

Our chapter adopted a data-driven approach to strategy and governance to build chapter dashboards. The core of this initiative was our use of chapter data to answer our business questions. We used these answers to identify strategic opportunities, set goals and targets, and define metrics for success. The answers to these questions often led to further exploration.

We've included some of the discoveries from our analysis in the attachment to illustrate how these questions led to operational or strategic action. While other chapters may have different questions, analysis, and actions, this submission will offer a starting point for thinking about how chapters can ask questions that data can illuminate.

2. Target Audience (Who will benefit/has benefited?):

The board has access to the dashboards. Building the dashboards, continuing to ask the questions, and using the data creates a benefit to the chapter members/guests.

3. Need(s) addressed (please be specific):

Our chapter was trying to solve problems around our membership, financials, and volunteer pipeline based on gut feel rather than data, and we were not confident that we truly understood the problems we were trying to solve. We built out business intelligence dashboards to better analyze our situation, determine our strategic priorities, and monitor our execution.

4. What were the Outcomes? (Please include hard data regarding financial, membership increases, target audience satisfaction levels, publicity for the chapter or for the profession, etc.)

There are many dashboards still evolving. One example of an outcome is how we utilize the Members Engagement dashboard.

Combining all data and using the various platforms and tools we determined that we had nearly 300 members, but only saw the same 40-50 faces at every event. We used member roster and event registration data to build a histogram. This revealed we had several organizational members not attending events. We were able to speak with several organizational members, from whom we learned that new members receive poor communication about their chapter membership and its benefits.

This led to a better onboarding experience to improve this part of the member lifecycle.

5. How did you implement? (Please give a brief description.)

Created a list of questions to identify data points for analysis. The questions are in the supporting document.

Once we identified the business questions, we determined what data sources to use to illuminate those questions. In our case, one fact was that many of our organizational members had never attended a single event. This information was “hidden in plain sight” – the data was in Wild Apricot without any additional setup on our part; we just needed to look at it. We identified other insights when we started digging into existing data.

Using Wild Apricot we were able to extract the data we needed, create event tags to further classify events to analyze the types of events getting attendance, as well as look at financials by event type. We brought in data from QuickBooks using our general ledger to track revenue and expenses.

We also utilized Microsoft Power BI (free with a MS nonprofit license) to do the actual business intelligence analysis which allows us to integrate a variety of spreadsheet exports with different column names and file structures. The details for all of the tools utilized are in the attached document.

6. Did you anticipate how much time would need to be dedicated to building this?

We underestimated the amount of time needed to build out dashboards in Power BI and how long it would take to clean up our existing data for automated reporting. On the flip side, we were surprised at how quickly we uncovered some of our initial insights (such as the engagement gaps between individual and organizational members).

7. Did you anticipate what the cost, if any, would be?

Wild Apricot has many settings available to provide better data to extract and use for strategy. The Power Microsoft BI platform is available at no cost with a Microsoft non-profit license.

8. Costs/Resource/Time Used: (Include any details regarding use of resources including monetary, donations, contributions, volunteer hours, people resources, etc. and how you went about getting these resources.)

There were no direct financial costs. It took 10-20 hours of focused volunteer time to define our initial metrics, clean up our data, and build the dashboards.

9. Lessons Learned: (Hints and tips for other Chapters who may be considering a similar effort)

Start small by leveraging your existing data and analytical tools that you are comfortable in (e.g., Google Sheets or Microsoft Excel). Prioritize metrics and data sources that are easy to track and directionally correct, rather than seeking the ideal. Focus on the questions that are most strategically relevant for your chapter; if you don't want to look at your data on a regular basis, you aren't looking at the right items.

10. When did you start working on this effort (date):

8/1/2021

11. When did the effort go live (date):

11/1/2021

12. What is your chapter's mission?

SEWI-ATD's mission is to partner with individuals and organizations we serve to develop highly skilled and talented professionals. Our chapter is defined by our commitment to our three pillars: to provide world-class talent development upskilling, to foster a sense of belonging in our professional community, and to create opportunities for leadership at all career levels.

13. How does this effort align with your chapter mission (Please provide specific examples)?

****ATD Mission: Empower professionals to develop knowledge & skills successfully.****

This initiative supports our pillars to provide world-class TD upskilling and a sense of belonging by allowing us to track member engagement and identify unmet member needs (for instance, by identifying groups of members that do not participate in our programs and determining what kinds of experiences would be relevant for them). It also supports our leadership at all levels pillar by giving us tools to build our volunteer pipeline (e.g., by tracking our most active members and identifying members who are ripe for conversations about volunteering)

14. How does this effort align with ATD's mission (Please provide specific examples)?

This initiative supports ATD's mission by allowing us to see what professional development topics are most in demand from our membership, by making it easier for chapter leaders to recruit volunteers to lead SIGs so they can grow their leadership skills, and by giving chapter leaders practical experience in data-driven decisionmaking.

15. Please list the specific ATD chapter resources that helped guide you in the process of completing this best practice: (e.g. people, documents, policies, by-laws, etc)

ATD Capability Model, Esther Jackson (NAC), Shelby Morris and Greg Simpson (NACs/Chapter Recognition Committee).

16. How did you become familiar with the Sharing Our Success (SOS) program?

- Saw or heard of SOS from Twitter
- Saw or heard of SOS from Facebook
- Saw or heard of SOS from another Chapter Leader
- Saw or heard of SOS from LinkedIn Chapter Leaders group
- Saw or heard of SOS on an area call with a NAC representative
- Found SOS on ATD website
- Other (Please describe)

17. Would you be willing to apply to present this submission at the ATD Chapter Leaders Conference (ALC)?
(Requests for proposals are currently open at td.org/alc. Selected session facilitators receive complimentary registration.)

Please email completed forms to SOS@td.org along with any supporting documents.