

Welcome!

Data Based Decision Making A Five Step Process

Cathy House

Director

The Osher Lifelong Learning Institute

University of Utah

Overview of Workshop

- The Process
- Laying the Foundation for Success
- Examples
 - data, tips, and tools
- RIT Success

The Process

GOALS



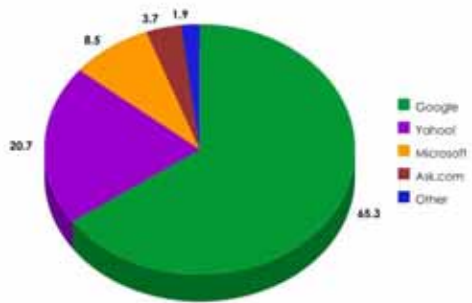
METRICS



COLLECT DATA



Microsoft CEO says catching Google is goal



Market Share



ANALYZE DATA AND MAKE DECISIONS



IMPLEMENT



Laying the Foundation for Success

Set Goals

- SMART
- SMARTER
- SAMM
- RUMBA

Measureable goals are critical for achieving success!!

Why Are Metrics So Important?

- Provide early warning of possible problems
- Provide the basis for problem solving and decision making
- Help us drill down to hidden layers and identify root causes of problems and “best” opportunities
- Tell us what to keep doing, what to stop doing, and what else to do

Laying the Foundation for Success Metrics

- Link to goals
- Represent contributing factors
- Break into pieces
- Can be measured – quantitative or qualitative
- Incorporate into goals or sub-goals
- Set criteria before you see the data

Laying the Foundation for Success

Collect the Data

- Automate
- Include everything you can think of plus some
- Consider formats that will facilitate analysis

Laying the Foundation for Success

Analyze the Data

- Analyze early and often
- Correlate to significant events
- Look for trends
- Understand changes and underlying factors
- Add metrics and collect more data to dig deeper

Programming Example

Goal:

- Offer enough but not too many classes.

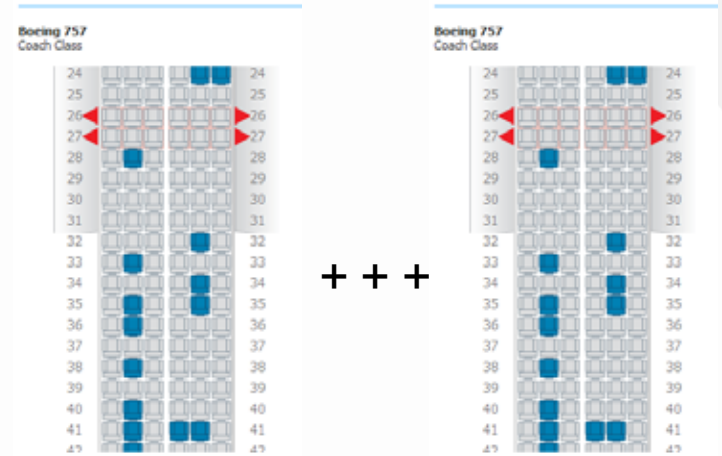
SMART Goals:

- Increase capacity utilization to 75%
- Increase average class enrollment to 20

Determine Useful Metrics

- **Capacity utilization**

- Total enrollment
- Total of class caps
- Include cancelled classes or not?



- **Average class enrollment**

- Total enrollment
- # students

Collect Data

- Enrollment
- Students
- Class caps
- # classes programmed
- # classes cancelled
- Class location
- Class title and number
- Class category
- Instructor
- Term

Enrollment Report

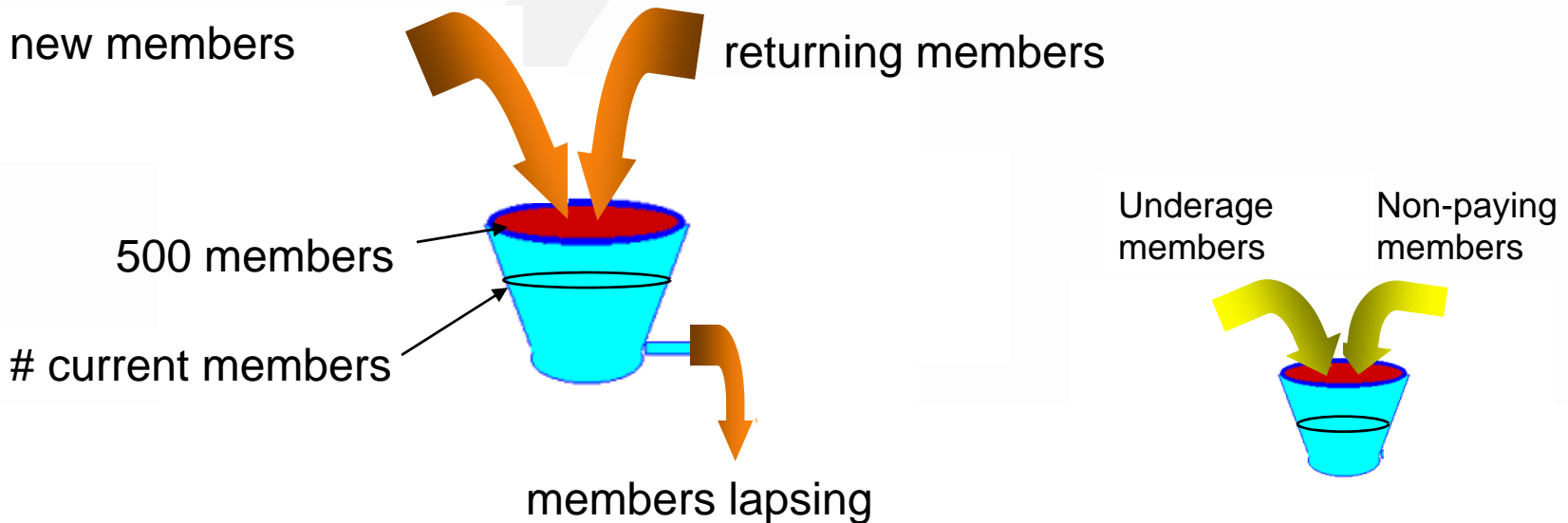
F04-W08 OSHER ENROLLMENT SUMMARY by Start Date												
	Term	Catalog	Secct	Short Title	Cap	Enrl	Spaces	Drops	Start Date	End Date	Location	Instructor
	F07											
1	1078	140	001	Spanish: Beginning	15	18	-3	2	09/17/2007	10/31/2007	FT D .	MERINO,MARTA
2	1078	200	004	Learn to Use Computer: C	10	9	1	2	09/17/2007	10/29/2007	BOUNTIFUL	BENNETT,LYNNE MAJ
3	1078	291	001	Digital Photography II	14	5	9	0	09/17/2007	10/29/2007	HSEB 3100D	TUTTLE,ROGER VAL
4	1078	300	005	Tai Chi	16	16	0	1	09/17/2007	10/29/2007	JEWISH CTR	IENATSCH,ELSA S.
5	1078	560	001	Emigration Canyon	15	8	7	3	09/17/2007	10/29/2007	FT D .	BENNETT,SARAH LLC
6	1078	611	001	Astronomy	36	26	10	2	09/17/2007	10/29/2007	FT D .	BIGELOW,ROBERT
7	1078	612	001	Books: Appreciating and	25	13	12	2	09/17/2007	10/29/2007	FT D .	WELLER,ANTHONY S
8	1078	614	004	Ceramics: Primitive Techn	20	9	11	1	09/17/2007	10/29/2007	BOUNTIFUL	SHAW,DIANE O
9	1078	618	001	Jazz: An Introduction and	30	22	8	0	09/17/2007	10/29/2007	FT D .	JACKSTIEN,LARRY
10	1078	619	001	Bury My Heart - Wounde	20	16	4	1	09/17/2007	10/29/2007	FT D .	DICKSON III,EPHRIAM
11	1078	621	001	Navigating the Informatio	20	11	9	1	09/17/2007	10/29/2007	FT D .	MOGREN,PAUL ANDR
12	1078	624	004	Writing - Basics of The W	30	10	20	2	09/17/2007	10/29/2007	BOUNTIFUL	CROWTHER,DUANE S
13	1078	135	001	Speaking French	15	15	0	4	09/18/2007	11/01/2007	FT D .	BURT,ANNIE
14	1078	141	001	Spanish: Continuing	15	13	2	3	09/18/2007	11/01/2007	FT D .	MERINO,MARTA
15	1078	146	001	Speaking Italian	15	13	2	2	09/18/2007	11/01/2007	FT D .	MASCHERO,GIOVANN
16	1078	147	001	Italian: Continuing	15	9	6	3	09/18/2007	11/01/2007	FT D .	MASCHERO,GIOVANN
17	1078	150	001	Demystifying the Mid Eas	36	51	-15	5	09/18/2007	10/30/2007	FT D .	WASILEWSKA,EWA
18	1078	320	004	Yoga: The Tao of Yoga	20	18	2	3	09/18/2007	10/30/2007	BOUNTIFUL	LAMBERT,MARLENE
19	1078	610	001	Archeology of South Am	35	35	0	3	09/18/2007	10/30/2007	FT D .	STONE,BARBARA JAI
20	1078	616	001	Constitutional Law: Fund	20	29	-9	4	09/18/2007	10/30/2007	FT D .	EYER,DANIELLE

Membership Growth Example

Goal: Grow to 500 unduplicated dues paying members by the end of the 2008 academic year.

Determine Useful Metrics

Growing membership is like filling a leaky bucket



Refine the Goal

- Bring in 15 AUCL and 40 Basic new members fall term, 15/50 new members winter term, and 15/65 new members spring term.
- Increase member retention to 50%

Collect Data

- Member name, contact info, when added to database, birth date, membership type, etc.
- First term
- Last term
- Membership renewal date

Member Database

ID	FIRST	LAST	DOB	ADDR	CITY	ST	ZIP	PHONE	EMAIL	MEMBER TYPE	MEMBER STATUS	RENEW DATE	1ST TERM	LAST TERM	ADDED TO DATABASE
1111	Gary	Last1	1945-04	Address	BOUN	UT	84010	555-5555	student@uta	Basic	ACTIVE	2009-05-01	1082	1084	2007-12-13
1111	KATH	Last2	1955-01	Address	SALT	UT	84109	555-5556	student@uta	Term1	INACTIVE	2007-05-01	1058	1064	2006-04-04
1111	LINDA	Last3	1949-10	Address	SAND	UT	84092	555-5557	student@uta	Basic	ACTIVE	2009-02-01	1068	1082	2006-08-29
1111	NEWE	Last4	1945-02	Address	SALT	UT	84125	555-5558	student@uta	Basic	ACTIVE	2009-02-01	1064	1082	2006-04-17
1111	SHAR	Last5	1941-10	Address	SALT	UT	84112	555-5559	student@uta	Trial	INACTIVE	2006-05-01	1054	1054	2006-04-04
1111	KATH	Last6	1948-12	Address	SALT	UT	84117	555-5560	student@uta	Term3	INACTIVE	2007-05-01	1064	1064	2006-04-25
1111	CARC	Last7	1950-01	Address	BOUN	UT	84010	555-5561	student@uta	Basic	ACTIVE	2009-05-01	1082	1084	2007-12-21
1111	CARC	Last8	1950-01	Address	BOUN	UT	84011	555-5562	student@uta	Basic	ACTIVE	2009-05-01	1082	1084	2007-12-22
1111	CARC	Last9	1950-01	Address	BOUN	UT	84012	555-5563	student@uta	Basic	ACTIVE	2009-05-01	1082	1084	2007-12-23
1111	CARC	Last10	1950-01	Address	BOUN	UT	84013	555-5564	student@uta	Basic	ACTIVE	2009-05-01	1082	1084	2007-12-24
1111	CARC	Last11	1950-01	Address	BOUN	UT	84014	555-5565	student@uta	Basic	ACTIVE	2009-05-01	1082	1084	2007-12-25
1111	CARC	Last12	1950-01	Address	BOUN	UT	84015	555-5566	student@uta	Basic	ACTIVE	2009-05-01	1082	1084	2007-12-26
1111	CARC	Last13	1950-01	Address	BOUN	UT	84016	555-5567	student@uta	Basic	ACTIVE	2009-05-01	1082	1084	2007-12-27
1111	CARC	Last14	1950-01	Address	BOUN	UT	84017	555-5568	student@uta	Basic	ACTIVE	2009-05-01	1082	1084	2007-12-28
1111	CARC	Last15	1950-01	Address	BOUN	UT	84018	555-5569	student@uta	Basic	ACTIVE	2009-05-01	1082	1084	2007-12-29
1111	CARC	Last16	1950-01	Address	BOUN	UT	84019	555-5570	student@uta	Basic	ACTIVE	2009-05-01	1082	1084	2007-12-30
1111	CARC	Last17	1950-01	Address	BOUN	UT	84020	555-5571	student@uta	Basic	ACTIVE	2009-05-01	1082	1084	2007-12-31
1111	CARC	Last18	1950-01	Address	BOUN	UT	84021	555-5572	student@uta	Basic	ACTIVE	2009-05-01	1082	1084	2007-12-32

Membership Growth

1

	New members	Total Going Inactive	Net growth	Total Members	% inactive
F04	49	0	49	49	
S05	86	0	86	135	
U05	7	0	7	142	
F05	64	15	49	191	7%
W06	25	0	25	216	0%
S06	41	51	-10	206	20%
U06	0	5	-5	201	2%
F06	77	26	51	252	9%
W07	62	9	53	305	3%
S07	80	35	45	350	9%
F07	166	35	131	481	7%
W08	81	33	48	529	6%
S08	51	TBD	TBD	580	TBD

Useful Excel Functions

New members

- =COUNTIF('osherpeople from database 3-18-08 with analysis.xls'!FIRST_TERM,"1082")

Members going inactive

- =COUNTIF('osherpeople from database 3-18-08 with analysis.xls'!Renewal_date,"2-7-08")

Net growth each term

- = New_members_this_term - Members_going_inactive_this_term

Total members

- =SUM(New_members)-Sum(Members_going_inactive)

Name Ranges

- Highlight range, then click on Insert, Name, Define. Include row or column heading and excel will assign the name.

Reference data in other worksheets

- Click on desired worksheet cell while entering formula

Pivot tables

Array Formulas

What if your OLLI is not growing as fast as you'd like or need?

Level 1:

- We aren't bringing in new members
- We bring in new members but they don't stay

Level 2:

- Why?

Good Luck to You On Your Data Based Decision Making Journey!

If you need someone to bounce ideas off
call or email:

801-587-9037

CHouse@aoce.utah.edu