Creating a Google Excel Doc for Multisite Reporting Using a Participatory Approach

So you get the most out of the next 45 minutes …

I'm already familiar with *Basic*	I want to learn (this is what we'll cover today!) *Intermediate*	I realize we're not going to cover *Advanced*
Creating an email account	**How to create, share, & protect google excel docs**	Complex coding in excel
Basic excel functions	**Participatory approaches to database construction**	Methods for data cleaning
Internet browsing	**Pros and cons of using a google excel doc**	Methods for analyzing data
Protection and Confidentiality basics	**Participant usability and reactions**	Advanced concepts in participatory evaluation
Database construction basics	**Troubleshooting and tips for working w google excel docs**	
Participatory evaluation basics	**How to tailor docs to meet multiple needs**	

Objectives

1. Google Docs 101
2. Context
3. Starting "participatory"
4. Pros and cons (demos and tips!)
5. Data usage
6. Final thoughts with Q&A

GOOGLE DOCS 101

Google Excel Doc 101

- Make it
  - Need a gmail account (create or use existing)
  - Go to drive
  - Create doc
- Starting tips
  - Rename
  - Add sheets
  - Download
- Share it
 - Share button
  - Choose level of sharing

1. Create/login – Select "Drive" icon

I. GETTING INTO THE EXCEL GOOGLE DOC

1. Go to www.gmail.com
2. Login using your username and password:
3. Select the App icon followed by "Drive"
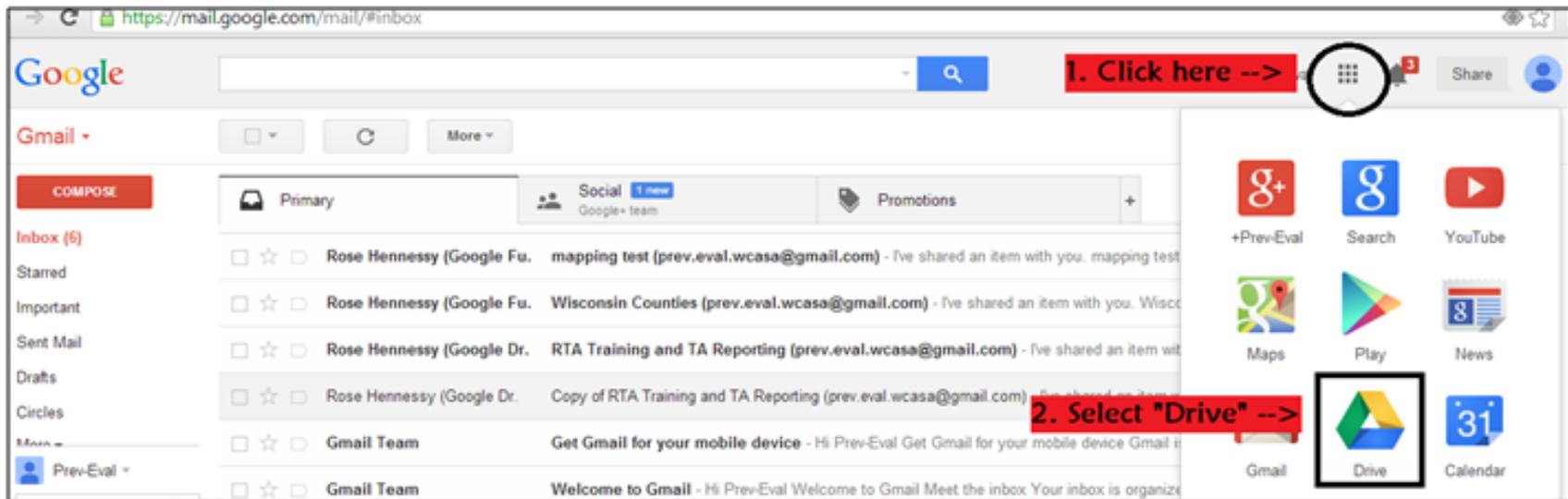
2. Create excel sheet
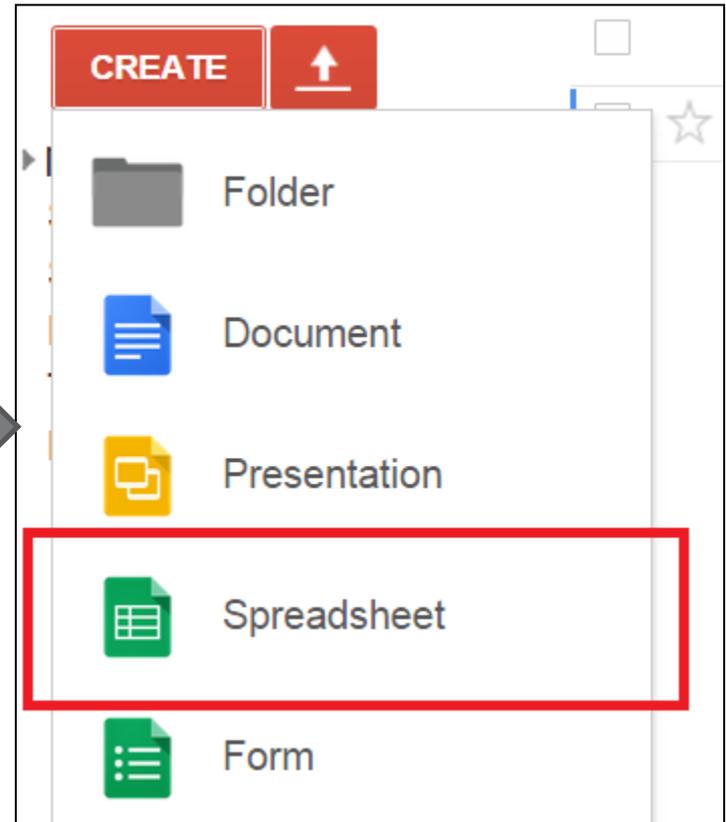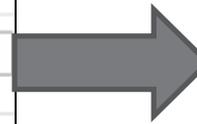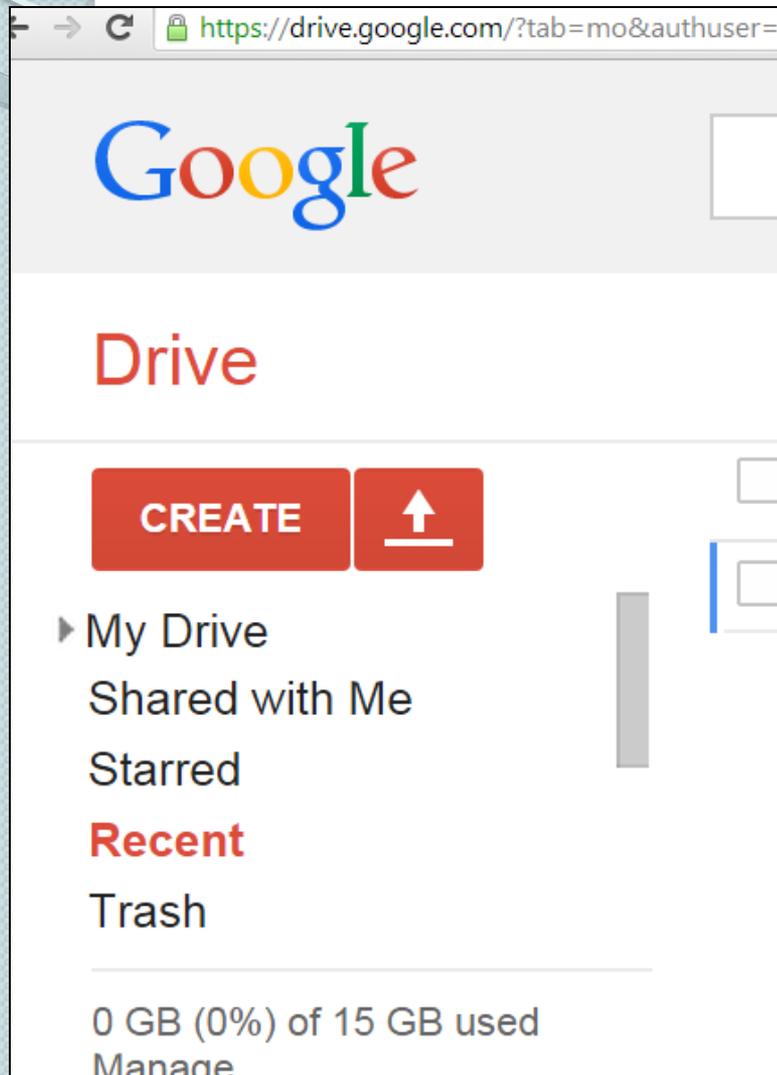
3 – 5. Starting Navigation Tips

RENAME
- Click on "Untitled spreadsheet"
- Rename item

ADD SHEETS
- Select "+" sign at bottom left hand corner

DOWNLOAD
- File → Download as (select type)

6. Share it!

Share it

Make sure to view in correct folder!

Drive

CREATE

▸ My Drive
Shared with Me
Starred
Recent
Trash
More ▾

Install Drive for your computer

Two minutes in two slides

CONTEXT

Context – Who, what, where

Wis... Assault

POSITION TITLE

Office Manager
Office Assistant
Finance Manager
Technology and Events Coordinator
CCR/SART Specialist
Director of Legal & Systems Services
Prevention and Evaluation Coordinator
Programs Coordinator
Executive Director
Director of Prevention and Programs

North-west
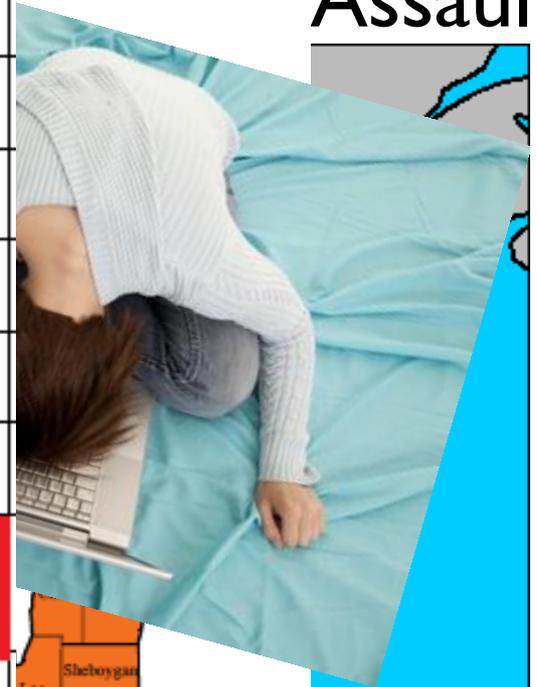
Southwest

South-east

Context – the "problem"

Need to report TA

No tracking system

Reach? Who serving?

Looking for a new approach!

Self-created forms

"hours and hours"
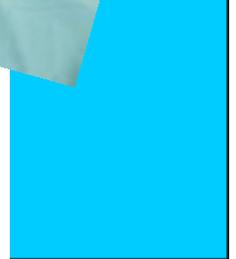
The goal

- Standardized and efficient way of tracking technical assistance from RTAs, consultants, and WCASA staff

STARTING "PARTICIPATORY"

Non-profit Eval 101 w/ Leadership

- Step 1: What do you NEED to know?
  - For funders

- Step 2. What do you WANT to know?
  - For evaluation

1. - Online meeting with RTAs

Next steps

- Check back in with leadership
- "test trial" with RTAs
- Changes
- Adapt and go "live with staff"
  - Gmail addresses for everyone
  - Staff meeting, everyone brought a computer
- Use "How to" guide

Ongoing changes

- Definitions page
- Acronyms
- Missing entry types
- Specifications
  - Other TA versus Other Not TA
- Trainings and meetings tracking
- For payroll
- Visual features
- New SASPs
- New staff – new sheets, new categories
- Adding "Grant"

PROS & CONS (DEMOS & TIPS!)

1 PRO – Many benefits of excel

- Protection, coding, fancy stuff, and data validation options
- Many of the same features from excel available in google excel doc
  - Coding
  - Validations
  - Drop-down options (type and fill)
  - Able to have all staff view others entries but not be able to edit them
  - Ability to pull content from one google excel doc to another
  - No click and point!
  - Faster data entry

Coding

"I love that all the SASP's and their corresponding counties are pre loaded."

Agency (SASP)	Agency (non-SASP)	County	Outcome_Referral	Outc
If TA -> If the agency is a SASP please select "SASP" in the previous column and then select the particular SASP below	If TA -> If agency was NOT a SASP, please type in the agency below	It TA -> Please enter the main county of the TA recipient(s)	If TA -> Did you provide one or more referrals?	If T prov
▼		=IF(P4 ="Advocates of Ozaukee", "Ozaukee", IF(P4="APFV Association For the Prevention of Family Violence", "Walworth", IF(P4="ASTOP, Inc.", "Fond du Lac", IF(P4="AVAIL, Inc.", "Langlade", IF(P4="Bolton Refuge House, Inc.","Eau Claire", IF(P4="Brighter Tomorrows", "Monroe", IF(P4="CAP Services, Inc.", "Portage", IF(P4="CASDA", "Douglas", IF(P4="CRA Community Referral Agency, Inc.", "Polk", IF(P4="Family Advocates, Inc.", "Grant", IF(P4="Family Center, Inc.", "Wood", IF(P4="Family Support Center","Chippewa",		
▼	Gateway Help Services			
▼				
▼				
▼				
▼				

Drop down options: Type and Fill Validations

Protect Range

1 CON- Not ALL excel options

- Other options are kept offline
  - Example: Macros
- Coding makes things go slower

"Sometimes it takes quite awhile for the pop up options to appear."

- Solutions
  - Offline analysis
  - Extending Google Sheets – Script
    - https://developers.google.com/apps-script/guides/sheets

2 PRO – Online!

- Access anywhere with an internet connection
- Multiple devices
- Don't need to "send" to one person for collection

2 CON – Online!

- Can't access offline
- Can be slower when internet connection is slower
    - Show offline reporting option
- Really works best on google chrome browser and not everyone is familiar with that

3 CON- Lack of control- privacy

- Even though it is not "publically" available it's not on a safe server
- Would never want to include highly confidential information

3 PRO – Central control

- No multiple versions floating around
- Changes can be standardized
- Can easily control who can view versus edit
- In one spot and accessible to evaluator (and finance and supervisor)

4 PRO – Flexibility*

- Due to central control and set-up, really easy to add columns, drop-downs unique to certain individuals, consultant versus staff specifications, track time-sensitive trends
- Flexible in which columns are filled out at what times
- Ability to put descriptions in each column
- Super easy to add new users

Where drop-downs are kept

TRAINING VALIDATIONS

TA Validations	Name	Region	Entry type	TA Entry	Expenses submitted	Content (for all 3 columns)	County	
	Kate	Northwest	Email	TA	Yes	Advocacy	Statewide	Y
	Janet	North Central	Phone call	Not TA	No	Child Sexual Assault	Multiple	N
	Lindsay	Northeast	Web-based TA		Will submit	Communications	Outside of WI	
	Maria	Southeast	In-person TA			Community Development / Organizing	Unknown	
	Gina	South Central	Program visit			Community & Offender Accountability	Adams	
	Taylor	Southwest	Provide webinar			Evaluation	Ashland	
	Hannah	Statewide	Provide training			Human Trafficking	Barron	
	Liz	Disability	Provide conference call			Legal	Bayfield	
			Host / Facilitate Training			Policy	Brown	
			Attend meeting			PREA	Buffalo	

Southeast TA ▾ | South Central TA ▾ | Southwest TA ▾ | Disability TA ▾ | 🔒 EVAL ONLY_Validations ▾ | TA Template

Drop-downs match here

"Frozen" descriptions

	A	B	C	D	E
1	**ID**	name	region	date	report
2	**ID**	**Name**	**Region**	**Date**	**Reporting options**
3			The region you serve - this should be the same for all cells	Date entry occured or TA was provided	Please select one of the following four reporting options. Please refer to your handout and description if needed.
19	**205**	Gina	Northwest		
20	**206**	Gina	Northwest		
21	**207**	Gina	Northwest		
22	**208**	Gina	Northwest		
23	**209**	Gina	Northwest		

4 CON- Google has the flex power

- Give up control on macro changes (they can release a new format or change their user interface and design elements)
- When they have drama we have drama
  - Example: Lost data – "confirming" data is really saved

5 PRO - Auto-restore

- Restoring revision history
- Able to "restore" changes up until maybe 20 or so revisions
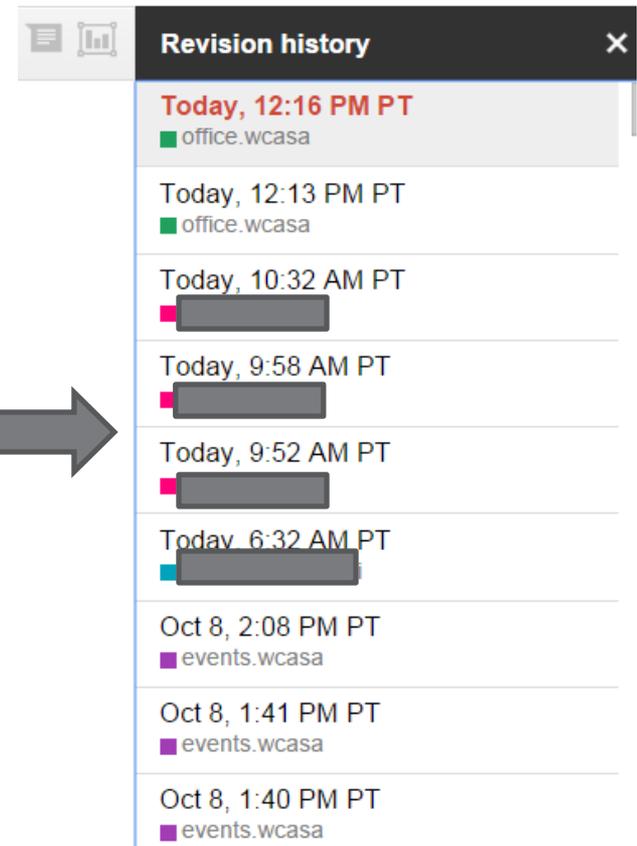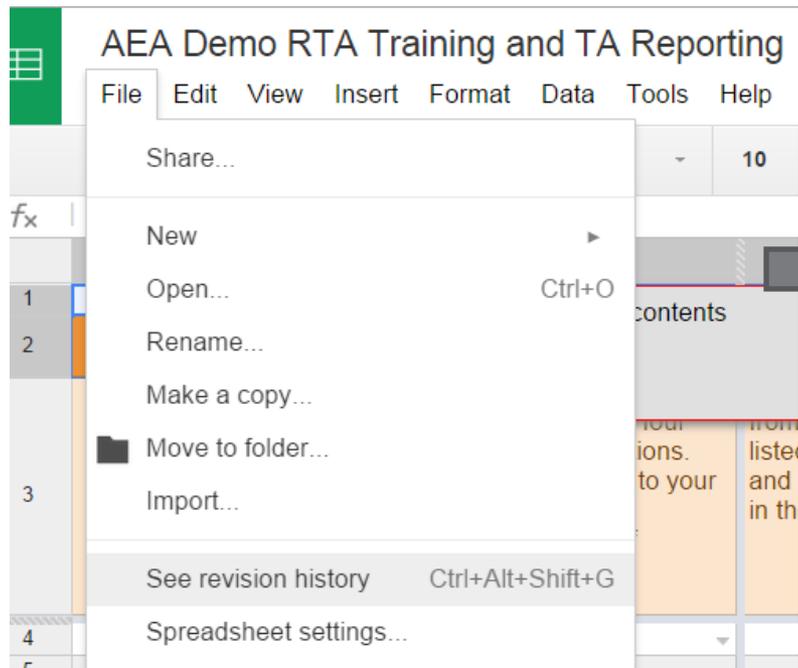
5 CON- Not super pretty

- Can be an issue with space on a small screen
- Solutions
  - Make screen bigger
  - Full size view
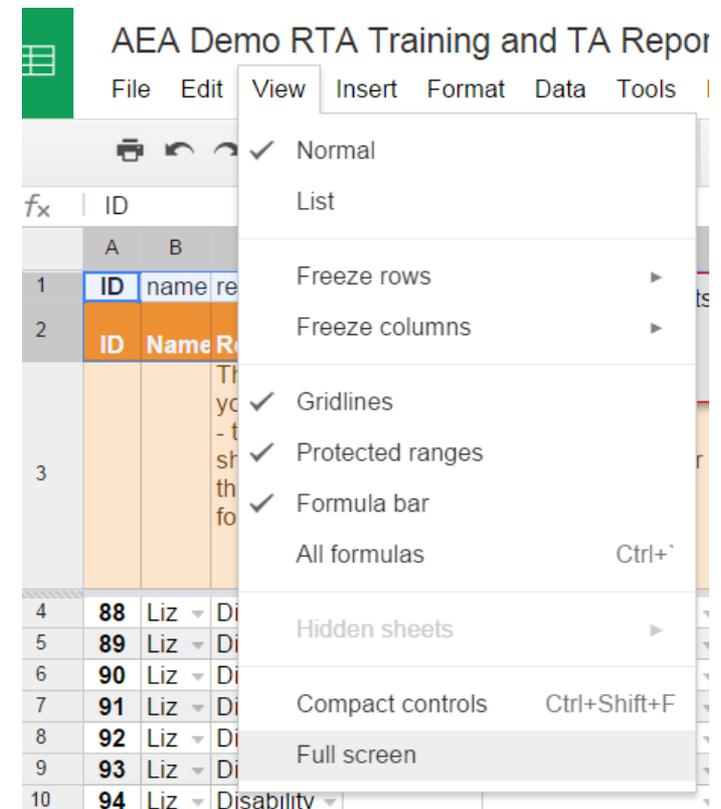
6 CON- General quirks

- Have to "go back" from each line
- Sorting by chronological order
  - May be a solution – not entirely clear – we've had a "makeshift" solution in place
- Can't download big files
  - Can copy and paste entire doc, delete sheets, and download particular sheet

7 CON– External cleaning & analysis*

- With each provider having their own "sheet" all the data needs to be combined elsewhere for cleaning and analysis
- Sheets need to be "emptied"
- Would need someone on staff with intermediate excel skills to complete this
- Current method

"File became very cumbersome with more than three months of data on each RTA sheet."

6 PRO – Relatively good usability

- Quick learning
  - (hardest part is getting to the document the first time for folks who are less familiar with internet navigation)
- Can "bookmark" and then point and click to login
- Most questions are "content" based.

"I am not always confident in what I am entering is correct and what is needed."

System Usability Scale

The graph below shows how the percentile ranks associate with SUS scores and letter grades.
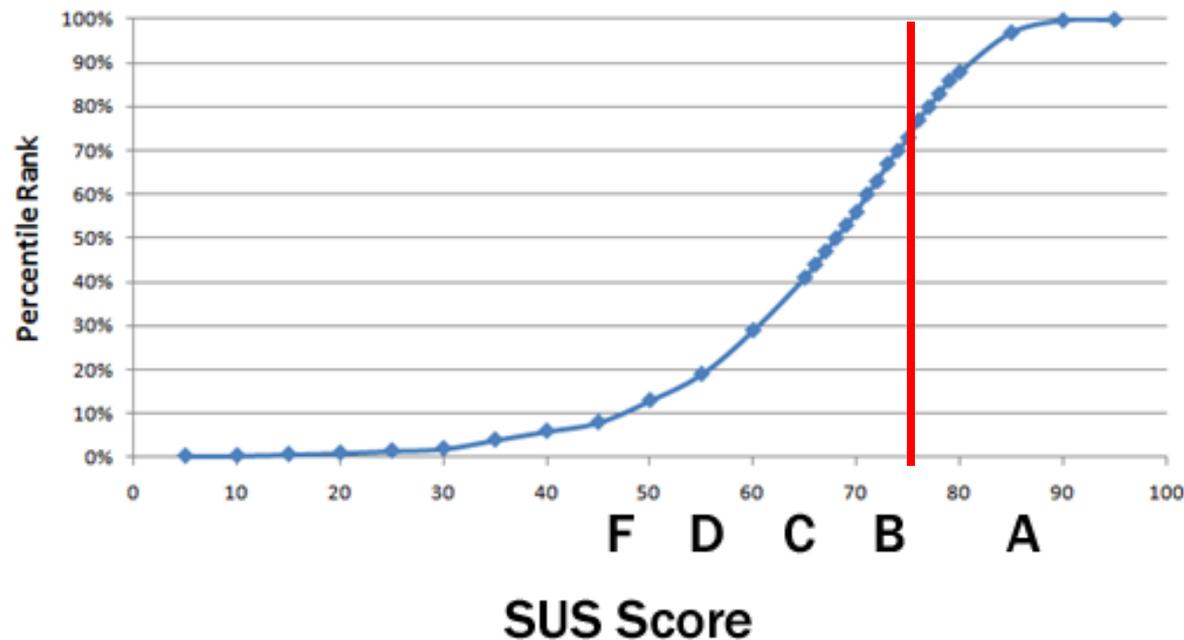
Average: 76

7 PRO – Power to the people

- Instead of putting into a general "database" everyone can see what they previously entered
- All on the same document, able to view others information for comparison or other notes
- Get full reports and individual reports back

DATA USAGE

BIG PRO - Data is really being used!

- Grant reporting
  - ED & Staff
  - Continuous reporting and final evaluations
- Quarterly board reports
- Monthly payroll purposes
- Full program team for improvement purposes and highlighting needs
- Advocating for funding (we ARE well connected, covering a lot with a little)
- Every quarter we're asking new questions and making changes for full staff and for individuals
- Very high internal satisfaction

FINAL THOUGHTS Q&A

Closing thoughts . . .

- Really need to consider if this is the right fit for what you're collecting
- Giving participants power in collecting and deciding on their data is really cool
- Participatory evaluation is a process – this takes time but the efforts really do show in the results

Thank you!

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