

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

# 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

I of VI



# GOOGLE DOCS 101

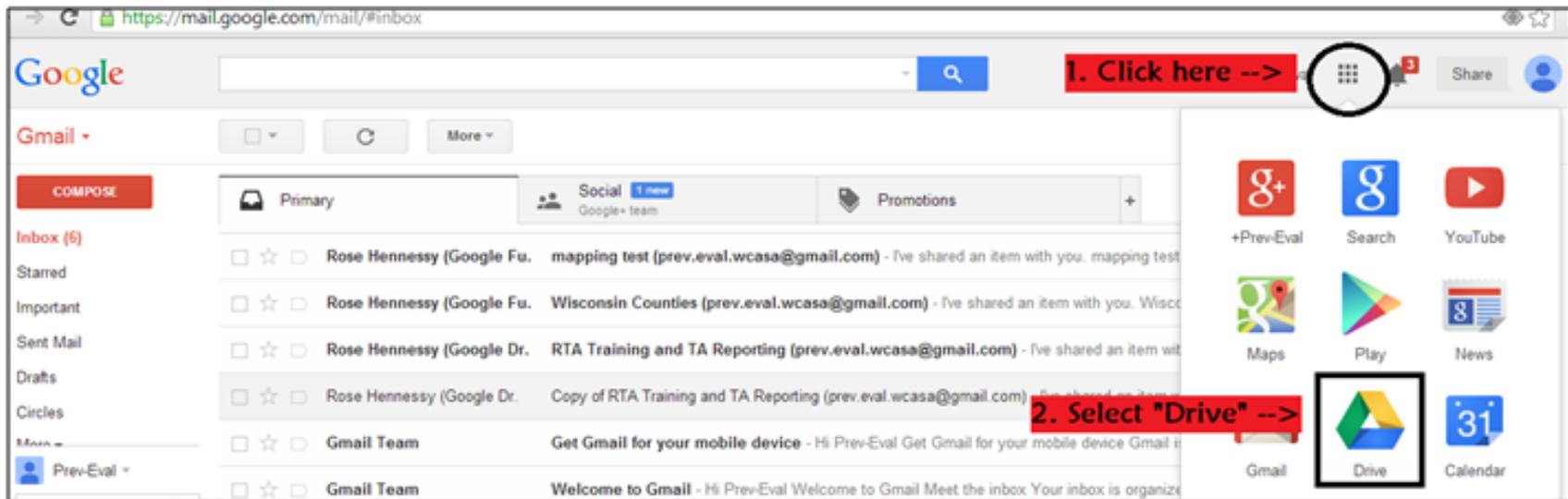
# Google Excel Doc 101

- **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

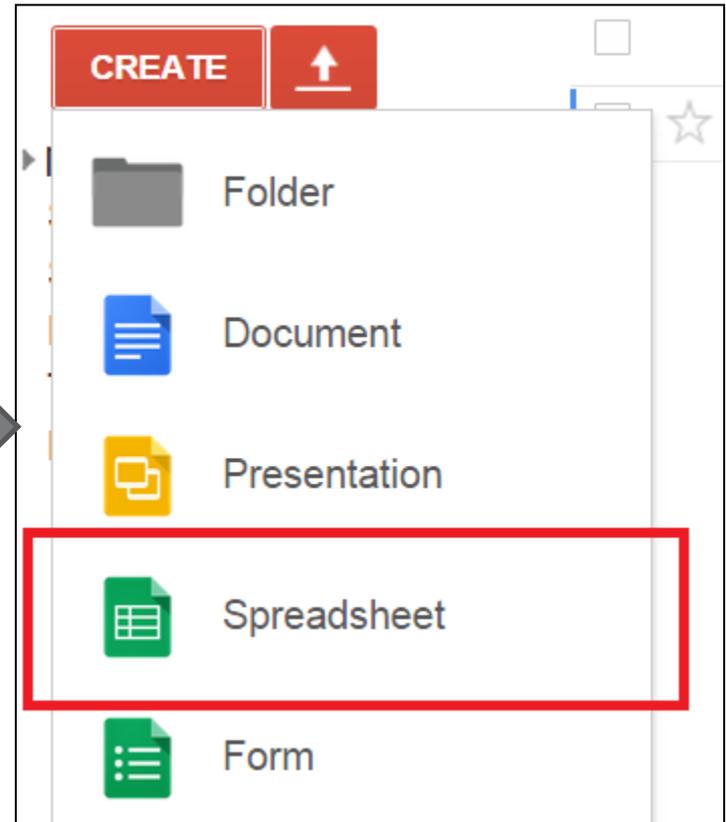
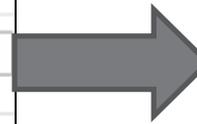
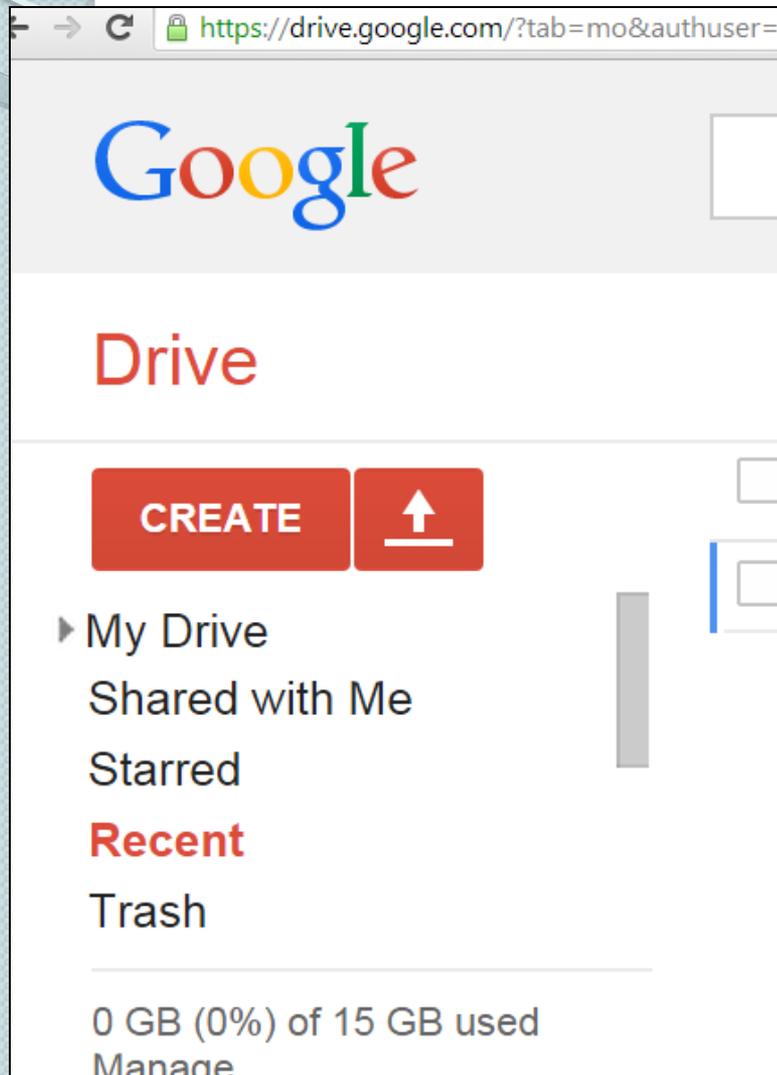
# I. Create/login – Select “Drive” icon

## I. GETTING INTO THE EXCEL GOOGLE DOC

1. Go to [www.gmail.com](http://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!

The screenshot shows a Google Sheets document titled "AEA demo" in a browser window. The address bar displays the URL: [https://docs.google.com/spreadsheets/d/1VrW0P2sY\\_rZyhuWHu44aueE4pEffCB\\_Crql](https://docs.google.com/spreadsheets/d/1VrW0P2sY_rZyhuWHu44aueE4pEffCB_Crql). The document title is "AEA demo" with a star icon and a folder icon. The menu bar includes "File", "Edit", "View", "Insert", "Format", "Data", "Tools", and "Add-ons". A "Comments" button is visible. A red box highlights the "Share" button, which is blue with a white lock icon and the text "Share". Above the "Share" button, the text "WCASA Webinar" is visible with a dropdown arrow. The spreadsheet grid shows columns A through F and rows 1 through 7. The formula bar is empty.

	A	B	C	D	E	F
1						
2						
3						
4						
5						
6						
7						
8						

# Share it

The image shows a screenshot of a spreadsheet application interface. At the top, the title bar reads "AEA demo" with a star icon and a folder icon. To the right, it says "WCASA Webinar" with a dropdown arrow. Below the title bar is a menu bar with "File", "Edit", "View", "Insert", "Format", "Data", "Tools", and "Add-ons". There are also "Comments" and "Share" buttons. The "Share" button is highlighted in blue. Below the menu bar is a toolbar with various icons for printing, undo, redo, and formatting. The main area of the spreadsheet is visible, showing a grid with rows numbered 1 to 14 and columns. A "Share with others" dialog box is open in the center. The dialog has a title "Share with others" and a "Get shareable link" button with a link icon. Below the title is a "People" section with a search bar containing "roseh@wcasa.org" and a button "Add more people...". To the right of the search bar is a "Can edit" dropdown menu. The dropdown menu is open, showing three options: "Can edit" (checked with a checkmark), "Can comment", and "Can view". Below the search bar is a text area labeled "Add a note". At the bottom of the dialog are "Send" and "Cancel" buttons. The "Send" button is blue, and the "Cancel" button is grey. The word "Advanced" is visible in the bottom right corner of the dialog. The spreadsheet background shows a grid with rows 1-14 and columns. The bottom of the spreadsheet shows a tab labeled "Sheet1" and a status bar with a green checkmark icon.

# 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**

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**CONTEXT**

# Context – Who, what, where

## POSITION TITLE

Wis North-west



Office Manager

Office Assistant

Finance Manager

Technology and Events Coordinator

CCR/SART Specialist

Director of Legal & Systems Services

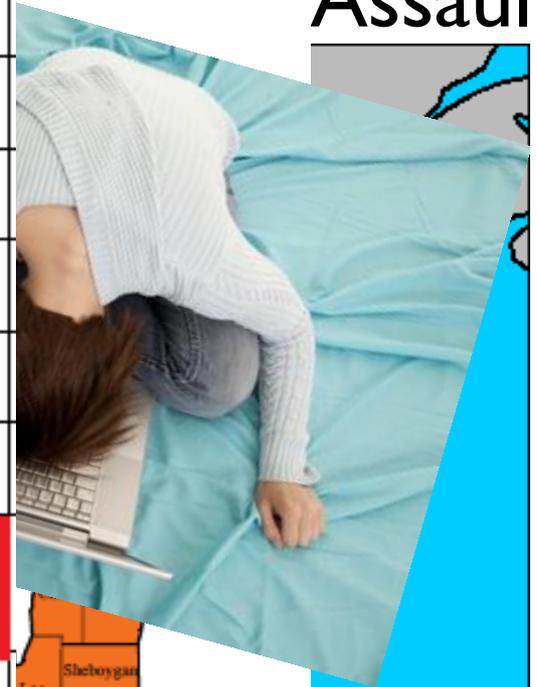
Prevention and Evaluation Coordinator

Programs Coordinator

Executive Director

Director of Prevention and Programs

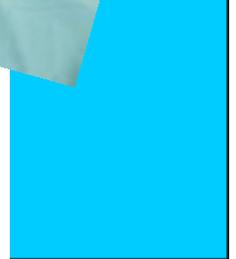
Assault



Southwest



South-east



# Context – the “problem”



# The goal

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

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# **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



# I. - Online meeting with RTAs

The screenshot displays a GoToMeeting interface. On the left, a video window shows a participant named Peter Fiala. The central window displays a Microsoft Word document titled "WCASA Staff and RTA TA and Training Codebook - Microsoft Word". The document content includes the title "WCASA Staff and RTA TA and Training Codebook" and the date "dated 4/8/14". Below the document, a Citrix table is visible, detailing variable descriptions and values for a codebook. On the right, the GoToMeeting control panel shows screen sharing settings, audio options, and meeting information.

Variable Name	Variable Description	Variable Values
ID	Total entry numbers	Numeric
name	Staff or contract name	Character
position	Position title or region	Character
date	Date of entry	Date
RTAreport	One of four reporting options; currently for RTAs only	Administrative Activities Programmatic Activities Technical Assistance Trainings, Meetings, Events
entry	Type of contact or event	Email Phone Call Web-based TA In-person TA Program visit Provide webinar Provide training Provide conference call Host/ Facilitate Meeting

# 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”

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# **PROS & CONS (DEMOS & TIPS!)**

# I 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	If 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

report	entry	time
Reporting options	Entry Type	Time -
entry ed or as led	Please select one of the following four reporting options. Please refer to your handout and description if needed.	Please select the entry type from the list below. If it is not listed please select "other" and enter your own category in the next cell.
1/2014	Technical Assistance	Email
2/2014	Programmatic Activities	Email
3/2014	Administrative Activities	Phone call
4/2014	Trainings, Meetings, Events	Web-based TA
5/2014	Administrative Activities	In-person TA
6/2014	Administrative Activities	Program visit
	Technical	Provide webinar
		Provide training
		Provide conference call
ngs	Northwest TA	Host / Facilitate Training

**validation** Click and enter a value or enter a new value in the next cell

# Protect Range

File Edit View Insert Format Data Tools Help All changes saved in Drive

Print Undo Redo Paste \$ % 123 Arial More

region

ID	Name	Region	Date	Entry Type
1	Taylor	Southwest		
2	Maria	South Cent		
3	Lindsay	Southeast		
4	Janet	Northeast		

The region you serve - this should be the same for all  
Date entry occurred or  
Please select the entry type from the list

- Clear column
- Hide column
- Resize column...
- Sort sheet A → Z
- Sort sheet Z → A
- Name and protect range...
- Conditional formatting...
- Data validation...

## Named and protected ranges

- + Add a range
- TemplateTest**  
'TA Template'!A1:E1002  
Can edit
- VariableNames**  
'Disability TA'!A1:W2

# I 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

H	I	J	K	L	M	N	O
<b>TA Validations</b>	<b>Name</b>	<b>Region</b>	<b>Entry type</b>	<b>TA Entry</b>	<b>Expenses submitted</b>	<b>Content (for all 3 columns)</b>	<b>County</b>
	Kate	Northwest	Email	TA	Yes	Advocacy	Statewide
	Janet	North Central	Phone call	Not TA	No	Child Sexual Assault	Multiple
	Lindsay	Northeast	Web-based TA		Will submit	Communications	Outside of WI
	Maria	Southeast	In-person TA			Community Development / Organizing	Unknown
	Gina Taylor	South Central	Program visit			Community & Offender Accountability	Adams
		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

report	entry	time
Reporting options	Entry Type	Time -
entry ed or as led	Please select one of the following four reporting options. Please refer to your handout and description if needed.	Please select the entry type from the list below. If it is not listed please select "other" and enter your own category in the next cell.
1/2014	Technical Assistance	Email
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4/2014	Trainings, Meetings, Events	Web-based TA
5/2014	Administrative Activities	In-person TA
6/2014	Administrative Activities	Program visit
	Technical	Provide webinar
		Provide training
		Provide conference call
ngs	Northwest TA	Host / Facilitate Training



K
Entry type
Email
Phone call
Web-based TA
In-person TA
Program visit
Provide webinar
Provide training
Provide conference call
Host / Facilitate Training
Attend meeting
Listserv TA
Listserv Non-TA
WCASA TA

# “Frozen” descriptions

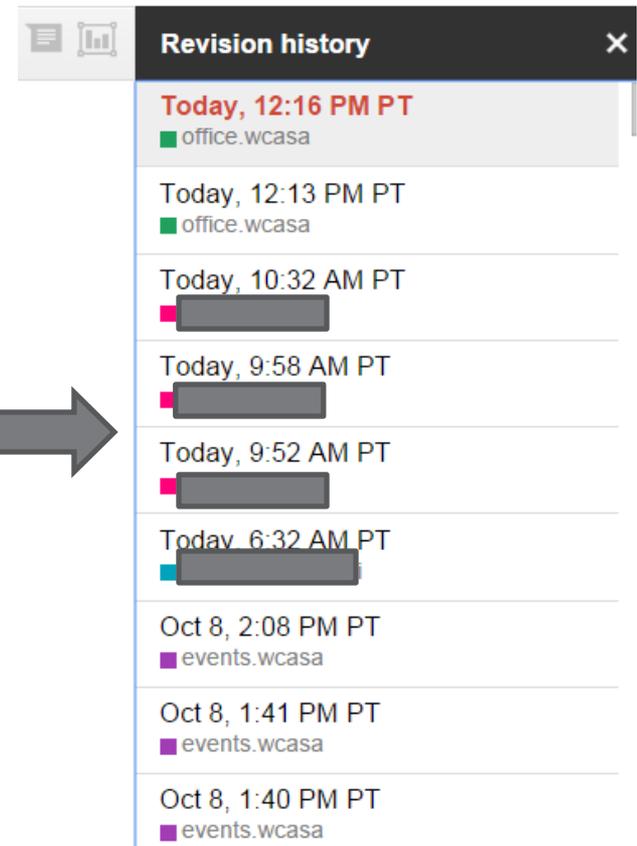
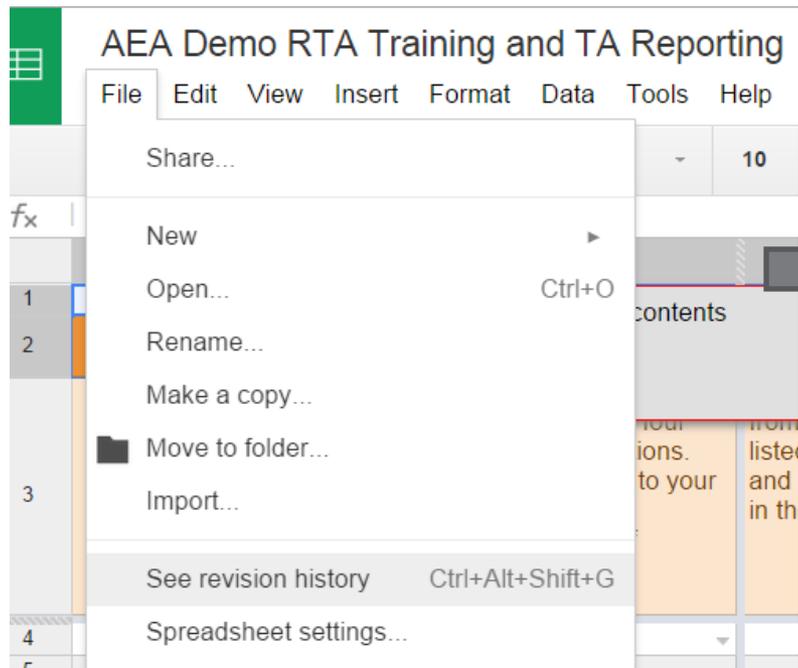
	A	B	C	D	E
1	<b>ID</b>	name	region	date	report
2	<b>ID</b>	<b>Name</b>	<b>Region</b>	<b>Date</b>	<b>Reporting options</b>
3			The region you serve - this should be the same for all cells	Date entry occurred or TA was provided	Please select one of the following four reporting options. Please refer to your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

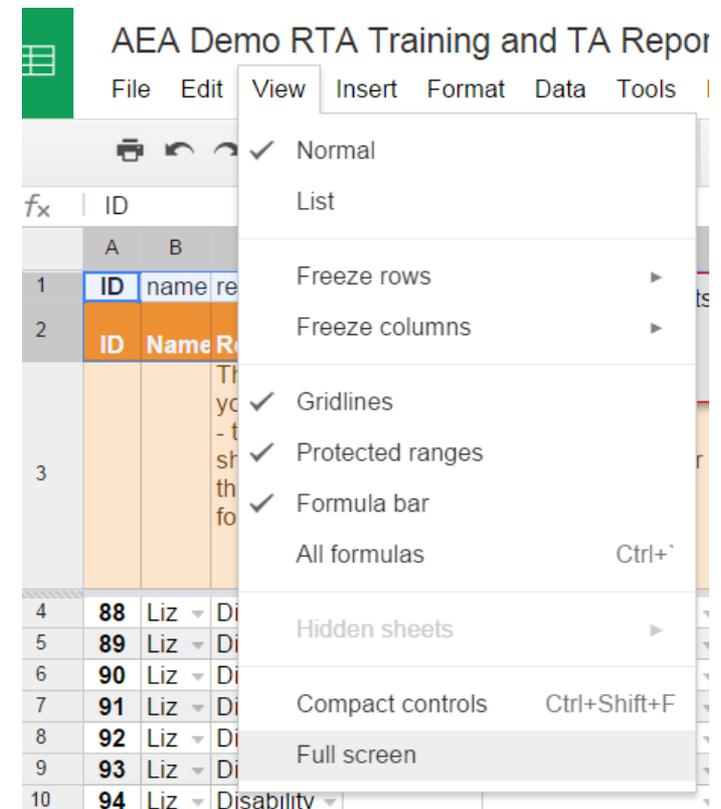
# 5 PRO - Auto-restore

- 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.”

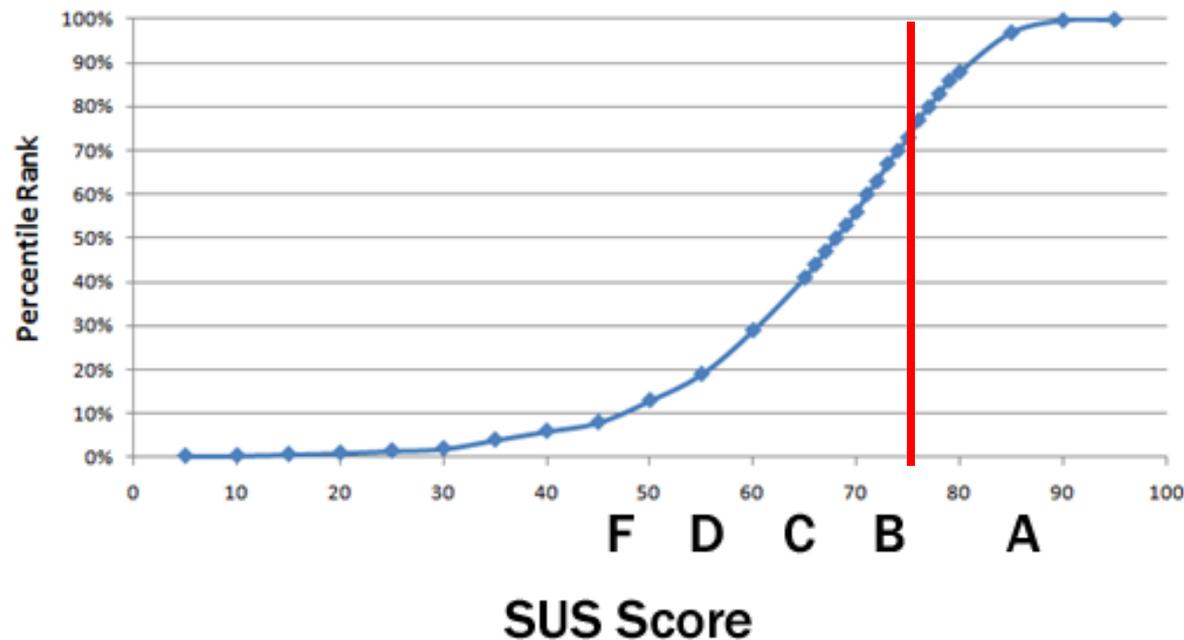
## 6 PRO – Relatively good usability

- 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

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# 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

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# **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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