DATA AND REPORTS THAT MATTER

THE UNIVERSITY of TEXAS SYSTEM

SYSTEM SEMINAR

Introduction & Welcome

A little about us & who we are

What we hope you get out of this session

How can you help: Ask questions, share examples, make it interactive

What is the value of data?

Easily misunderstood

Equal parts asset and goldmine

- **Use your data to your advantage**
- **Accept the challenge before you**
- **Network with others**
  - **Build a web of support and validity**
- **Be your own cheerleader: You can do it!**

How data can help

What is your organization tracking?

Who knows your data the best (is this you?)

- **Get to know them very well**
- **Ask questions**
- **Learn the database so you can communicate clearly with them. This is key to forming a strong partnership**
  - **Lack of understanding the database will be a major roadblock**

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Getting Started and Focusing on the Basics

Who at your organization cares about data?

- **Is there a need to better understand your data?**
- **How do you build your case?**

Partner up to avoid roadblocks

- **Get an internal champion to join your cause**

Stacking the deck for success

Define segments to report on

- **Event attendance**
- **Member engagement**
- **Donors: fiscal year & calendar year**
- **Reunion years**
- **Member & Alumni formed groups**
- **Social media engagement**

Customize Customize Customize

Beware/Be Aware

The best segments are ones unique to your organization, specific projects, and specific units

- **Not cookie cutter**
- **Will not work everywhere**
- **Sometimes you have to start from scratch**

Example

- **Law graduates who own & run businesses**

Now Reporting for Reporting

- Delivery is key
- Cover sheet will get you far
- Be clear
- Respect your audience's learning curve (roadblock?)

Simplify Simplify Simplify

Cover sheet will get you far

- As a data specialist your first question may be: **Why?**
  - Cut to the chase on your findings
  - Show your work
  - Map your process
  - What to expect in the report
  - Ultimately it helps to eliminate **roadblocks**
    - Familiar, Reliable, Summarized

Let's get ready to export!

- **Seek data points that**
  - **Important to the audience**
  - **Helpful**
  - **Up to date**
  - **Useful**
  - **Can be used to drive a conversation**

Let's get ready to export!

- **Find your comfort zone**
  - **Name**
  - **Age**
  - **Job Title & Company**
  - **Major Gift Capacity**
  - **Most recent interaction (listed in the database)**
  - **Giving details**
  - **City & State**

Let's get ready to export!

- What we have to offer
  - Head of household
  - Eliminate duplicates
  - Up to the minute Giving and Actions
  - Attributes
  - Details **Details** Details
- More than 50 columns (priority order)

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Name	Age	Position	Organization	Class	Degree	Major	City	State	Total UTA Giving	Major Giving Capacity	Assigned Solicitor	Last Action
Alumni with Giving												
Peter Griffin	63	General Manager	Pawtucket Patriot, Inc.	'75	BS	Accounting	Quahog	RI	$2,700,415.00	$1,000,001.00 and up	Garth Algar	6/4/2015
Homer Simpson	66	Retired	National Grid	'73	BS	Nuclear Engineering	Springfield	??	$1,841,650.00	$1,000,001.00 and up	Bruce Wayne	10/28/2016
Lucious Lyon	68	Founder	Empire, Inc.	'11	BS	Music	New York	NY	$1,604,841.06	$500,001.00 - $1,000,000.00	Lois Lane	10/25/2016
Sam Houston	61	CEO, Chairman of the Board	Texas Independence Insurance	'78	BS	Civil Engineering (CE)	Austin	TX	$1,305,595.19	$1,000,001.00 and up	Michael Bolton	10/7/2016
Paul Revere	55	President and Chief Operating Officer	Revere Silver & Copper	'12	PhD	Finance (FINA)	Boston	MA	$1,202,555.00	$1,000,001.00 and up	Bruce Wayne	10/13/2016
Ben Franklin	59	President/Owner	Franklin Publishing	'80	BBA	Management (MANA)	Philadelphia	PA	$1,171,210.00	$1,000,001.00 and up	Garth Algar	10/7/2016
Wayne Campbell	66	Owner	Shrek Productions	'75	MSSW	Social Work (SOCW)	Aurora	IL	$1,100,047.34	$1,000,001.00 and up	Bruce Wayne	11/7/2016

Data and Reporting

- **A note on the importance of customization and pinpointing your target audience….**

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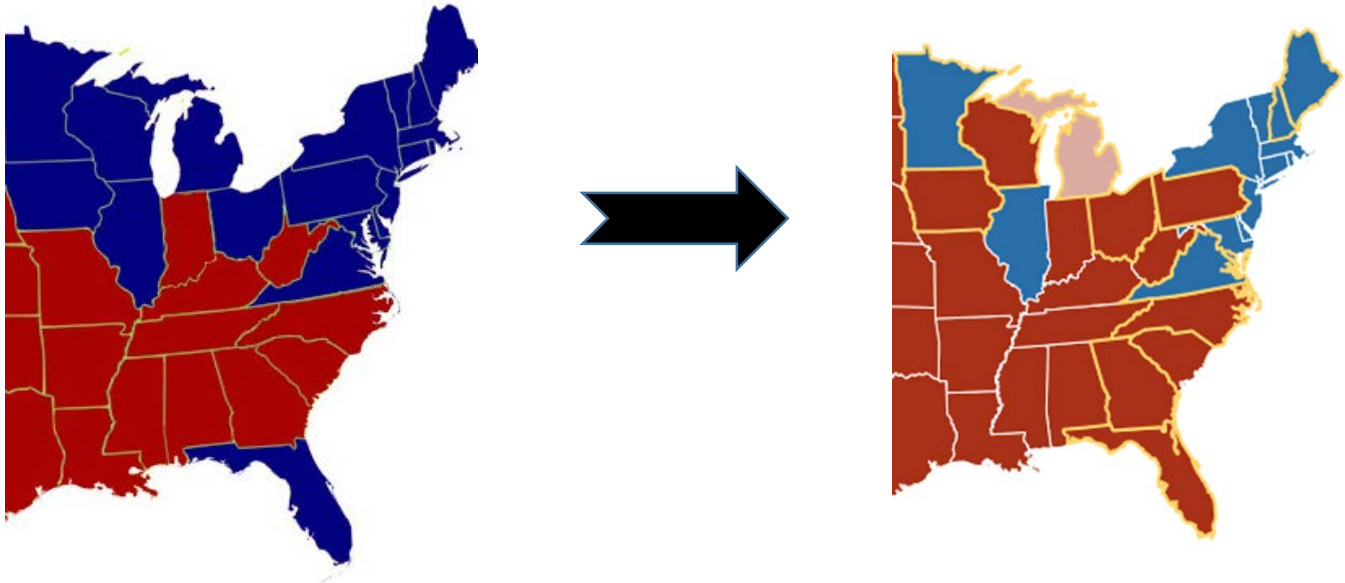


Seeing data differently: Seek inspiration

- **Internal data vs. "Big Data"**
  - **"we used to be very proud that we had…50 sets of data points on you. Now we have 8,000, 9,000, 10,000. And, you know, we can go through every tweet you've ever made and append that to the voter file"**
- **Depth of data**

- Location density for different voter types who were interested in specific issues and based social media ads on this information
- “We played Moneyball, asking ourselves which states will get the best ROI for the electoral vote”
- Spent so little money and relied so heavily on data that the campaign was able to utilize on-the-ground volunteers and new, targeted TV ads
  - Example: Game 7 of World Series

Seeing data differently: Seek inspiration

Box Office Mojo

Seasonal Box Office

ALL RELEASES | WIDE RELEASES | LIMITED RELEASES | CALENDAR GROSSES

INDEX BY SEASON | INDEX BY YEAR | SEASON-TO-DATE

Winter – Spring – Summer – Fall – Holiday

Note: The Spring Season is defined as the first Friday in March through the Thursday before the first Friday in May.

Year	Total Gross	Change	Days in Season	Avg.	Movies	Avg.	Avg. Drop*	#1 Movie	Gross	% of Total
2016	$674.1	-51.8%	62	$10.9	58	$11.6	-54.0%	Zootopia	$241.4	35.8%
2015	$1,397.4	-5.8%	55	$25.4	113	$12.4	-46.6%	Furious 7	$353.0	25.3%
2014	$1,484.2	+4.6%	55	$27.0	125	$11.9	-48.3%	Captain America 2	$259.8	17.5%
2013	$1,418.4	-14.0%	62	$22.9	133	$10.7	-50.7%	Oz The Great and Powerful	$234.9	16.6%
2012	$1,649.3	+2.0%	62	$26.6	130	$12.7	-50.1%	The Hunger Games	$408.0	24.7%
2011	$1,616.2	-0.6%	62	$26.1	114	$14.2	-47.6%	Fast Five	$209.8	13.0%
2010	$1,626.3	+29.5%	62	$26.2	93	$17.5	-48.8%	Alice in Wonderland	$334.2	20.5%
2009	$1,256.2	+16.9%	55	$22.8	95	$13.2	-53.5%	Monsters Vs. Aliens	$198.4	15.8%

Seeing data differently: Seek inspiration

Texas Tribune

THE TEXAS TRIBUNE

Search Campaign Finance Data — Contributor or Filer Name...

Texans for Greg Abbott

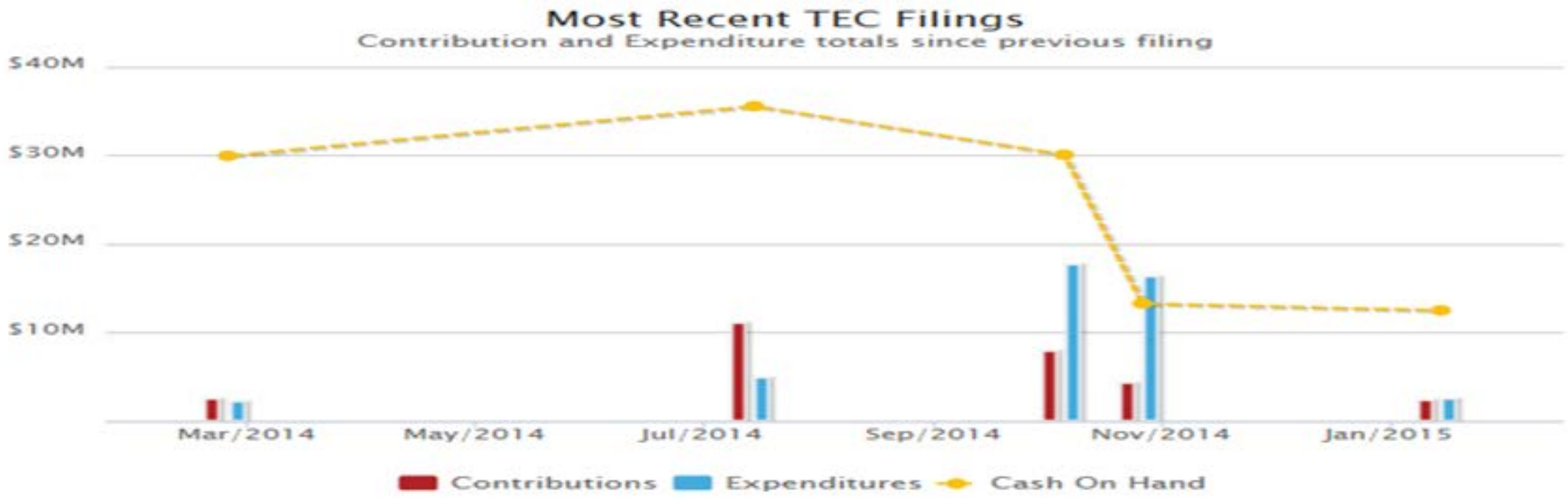
Specific Purpose Committee

View Filings on the Texas Ethics Commission's website

PURPOSE OF THIS PAC

Supports Greg Abbott

HISTORICAL CONTRIBUTIONS/EXPENDITURES



Seeing data differently: Seek inspiration

Baseball Reference

Postseason

WorldSeries (4-1):	**Kansas City Royals** over New York Mets
ALCS (4-2):	**Kansas City Royals** over Toronto Blue Jays
NLCS (4-0):	**New York Mets** over Chicago Cubs
LDS (3-2):	**Kansas City Royals** over Houston Astros
LDS (3-2):	**Toronto Blue Jays** over Texas Rangers
LDS (3-1):	**Chicago Cubs** over St. Louis Cardinals
LDS (3-2):	**New York Mets** over Los Angeles Dodgers
WildCardGame (1-0):	**Houston Astros** over New York Yankees
WildCardGame (1-0):	**Chicago Cubs** over Pittsburgh Pirates

Team & League Standard Batting

Glossary · SHARE · Embed

Total Bases/At Bats or (1B + 2*2B + 3*3B + 4*HR)/AB
For recent years, leaders need 3.1 PA per team game played

Tm	#Bat	BatAge	R/G	G	PA	AB	R	H	2B	3B	HR	RBI	SB	CS	BB	SO	BA	OBP	SLG	OPS	OPS+	TB	GDP	HBP	SH	SF	IBB	LOB
ARI	50	26.6	4.44	162	6276	5649	720	1494	289	48	154	680	132	44	490	1312	.264	.324	.414	.738	99	2341	134	33	46	57	40	1153
ATL	60	28.8	3.54	162	6034	5420	573	1361	251	18	100	548	69	33	471	1107	.251	.314	.359	.674	89	1948	148	44	67	31	39	1145
BAL	43	27.9	4.40	162	6007	5485	713	1370	246	20	217	686	44	25	418	1331	.250	.307	.421	.728	96	2307	127	51	20	32	23	990
BOS	44	28.3	4.62	162	6237	5640	748	1495	294	33	161	706	71	27	478	1148	.265	.325	.415	.740	98	2338	127	46	30	42	28	1142
CHC	50	26.9	4.25	162	6200	5491	689	1341	272	30	171	657	95	37	567	1518	.244	.321	.398	.719	96	2186	101	74	32	35	47	1165
CHW	31	28.2	3.84	162	6070	5533	622	1381	260	27	136	595	68	42	404	1231	.250	.306	.380	.686	91	2103	125	65	30	37	22	1065

Thank you!

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Q&A

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