**Metrics Driven: How We Use Data**

**TIME ALLOTTED: 20 Minutes**

**PRESENTER(S):**

**MATERIALS NEEDED:**

* Projector and PPT
* Laptops for participants
* Log-in credentials to SmartVAN for participants

**GOALS FOR THIS SECTION:**

* Understand the different ways we use data to help us organize
* Practice using SmartVAN to track an aspect of your organizing work
* Recognize that without data, our organization can’t know if we are accomplishing our goals

**AGENDA**

**0:00 – 0:04 Introduction**

0:00 – 0:02 **[Slide 1]** Personal story introduction

0:02 – 0:03 **[Slide 2]** Introduce session and goals

0:03 – 0:04 **[Slide 3]** Agenda review

**0:04 – 0:17 Managing Your Organizing With Data**

0:04 – 0:05 Classic Analogy

* **[Slide 4]** When teaching a technical topic, it’s generally a good idea to make an analogy with something that everyone knows.
* The database we use to track our organizing work is really an elaborate card catalog that you would find in a library.
* Instead of books, our database houses voters and volunteers. Like a book, each person has a record within our database. When you think about searching through our database, just picture trying to find the right book.
* What kinds of things might you search by if you were looking for a book? [Make comparisons of author/genre/subject matter to items found in SmartVAN.]

0:05 – 0:06 Our Database

* **[Slide 5]** This is what our “card catalog” actually looks like. You can log-in to SmartVAN at ofavan.org.
* If you’ve used VoteBuilder before, our system should look very familiar to you.

0:06 – 0:08 Why is Data so Important

* **[Slide 6]** In our work, people and relationships always come first. Data is only here to support that goal. However, due to the scale at which we work, we need a good system in place to track everything that we do.
* **[Slide animations]** [Discuss each bullet point about why data is so important to us.

0:08 – 0:10 Tabs in Our Database

* **[Slide 7]** After you log-in, you will see two tabs at the top of the screen.
* Has anyone seen these tabs before? Who is contained in each tab?
* **[Slide animation]** Right! It’s important that we distinguish who is contained in each tab. [Explain who is found in each tab and when we would use those tabs.]

0:10 – 0:15 Putting data in action

* **[Slide 8]** Later, we will go in depth on many of the different ways we use SmartVAN. For now, let’s think about how data might be used for some common organizing activities.
* Making phone calls to recruit for events is a very common practice. How might data factor into that activity? **[Slide animation]** [Explain concept of pulling lists and using Virtual Phone Bank.]
* **[Slide 9]** What about getting people to attend an event? How can we capture RSVP information about attendees? **[Slide animation]** [Explain use of calendar.]
* **[Slide 10]** Growing our chapter leadership is essential to making progress on our goals. How might we track the development of our leadership? **[Slide animation]** [Explain how survey responses can track this information.]

0:15 – 0:17 Metrics Driven

* **[Slide 11]** We’ve only touched on a few of the things that you do as an organizer. However, for any task that you can think of, there is probably a way to track that information in SmartVAN.
* What other tasks will you need to accomplish while organizing? [Facilitate discussion on how data can help with other tasks you will need to accomplish (finding people who signed up online, engaging volunteers that have already come to events, tracking 1:1’s, etc.)]

**0:00 – 0:00 Hands on Activity**

* **[Slide 12]** [Time for this section is dependent on the data module that is used. Insert data module of your choice into this section, or explain when the hands-on practice will be occurring.]

**0:17 – 0:20 Debrief**

0:17 – 0:18 Data Rules to Live By

* **[Slide 13]** Data is a very broad topic, so here are some rules to help guide you through your time learning SmartVAN.
* **[Slide animations]**

0:18 – 0:20 Debrief

* **[Slide 14]** Who remembers one way in which we use data to help us organize? How about how data is helpful when making phone calls?
* **[Slide animation]** Let’s revisit our parking lot. What other questions do you have? It’s ok if you don’t know what questions to even ask right now.
* **[Slide animation]** And finally, what do we mean when we say “If it’s not in SmartVAN, it didn’t happen.”?