

Improving Data Management for CERES Adult Learning Program

30th April, 2024

Cameron Best, Ladd Breinholt, Hazel Green & Emily Hudson



WPI

CERES SCHOOL OF
NATURE
AND CLIMATE

Our Team



Emily Hudson, Ladd Breinholt, Cameron Best & Hazel Green



Project Goal Statement

This project is intended to help the CERES School of Nature and Climate streamline its information management system within the Adult Learning Program by implementing Monday.com as a centralised data location.

Project Objectives

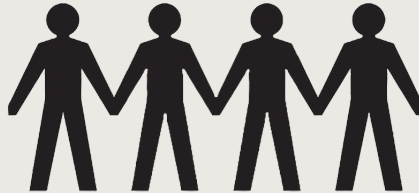
- 1. Learn about the operations and data management system within the Adult Learning Programs**
- 2. Design a new streamlined system using Monday.com**
- 3. Implement the new system**
- 4. Provide documentation and training for CERES staff**

Human-Centered & Iterative Approach

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DESIGN



TRAIN



TEST

Learning Through Interviews



First-Hand
Experience



Create
Personal
Connections

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Who We Interviewed



Jonathan Noble: Head of School of Nature and Climate



Luisa Cardamone: Workshops Program Lead



Chris Pendleton: Administrator, Adult Learning



Andrea Nelson: Marketing Lead



Karen Mengell: Courses Program Lead



Prasad Omprakash: IT Administrator



Claire Cummings: Systems and Communications Coordinator



Sarah Murfitt: Student Programs Bookings

The Adult Learning Program Offers Different Types Of Programs That Are Aimed To Reach The Same Goal

Courses

Contains several sessions that stretch across multiple weeks for in-depth learning

Workshops

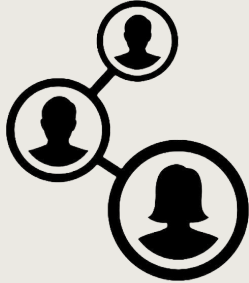
Runs for a few hours on one day for quick learning about a single topic

Inefficiencies Of The Previous System

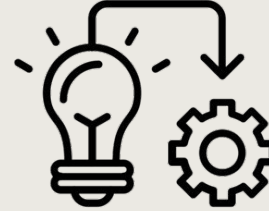
1. Manually sending mass emails before workshops and courses
2. Low number of feedback forms that contain usable information
3. Different order information stored on several different platforms
4. Little to no data reporting system

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Inefficiencies Can Lead To Larger Issues



Less time connecting
with community



Difficult to adapt programs to
participant feedback



Disorganisation can lead
to confusion

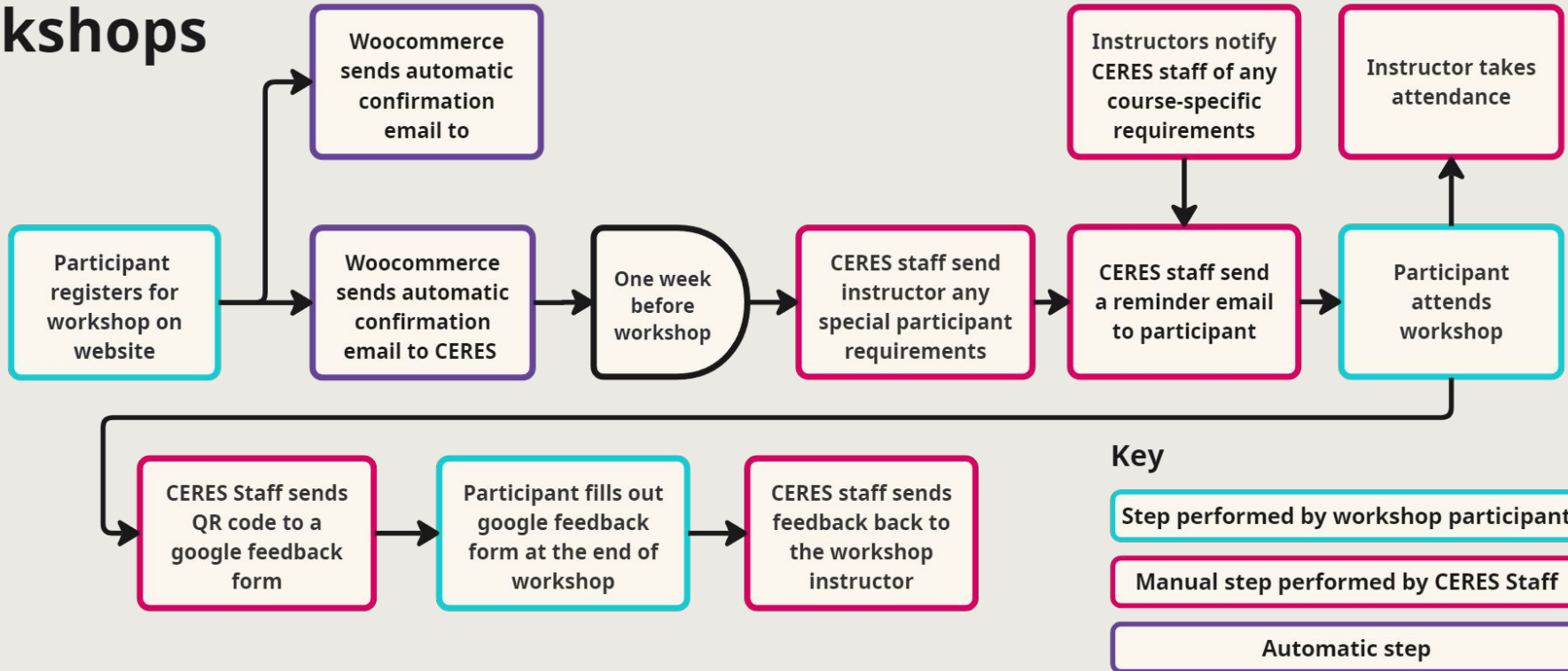


Difficult to produce
customised reports

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Map Previous Workflow

Workshops



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What Is Monday.com?

Q3 project overview

Main table | Timeline | Kanban | Dashboard + | Integrate | Automate / 2

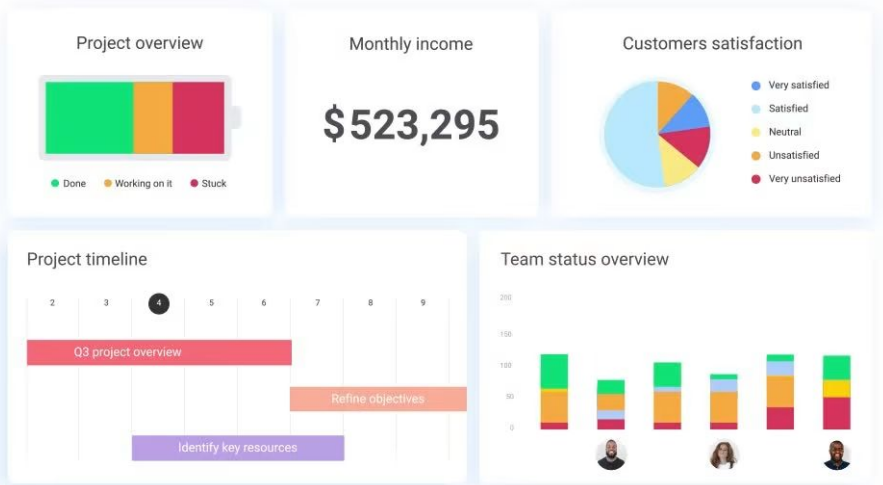
This month

	Owner	Status	Timeline	Due date	Priority	
Finalize kickoff materials		Done	<div style="width: 100%;"></div>	Sep 15	★★★★★	
Refine objectives		Working on it	<div style="width: 75%;"></div>	Sep 19	★★★★★	
Identify key resources		Stuck	<div style="width: 25%;"></div>	Sep 22	★★★☆☆	
Test plan		Done	<div style="width: 100%;"></div>	Sep 26	★★★★★	

Next month

	Owner	Status	Timeline	Due date	Priority	
Update contractor agreement		Done	<div style="width: 100%;"></div>	Oct 10	★★★★★	
Conduct a risk assessment		Working on it	<div style="width: 75%;"></div>	Oct 13	★★★★★	
Monitor budget		Stuck	<div style="width: 25%;"></div>	Oct 19	★★★★★	
Develop communication plan		Done	<div style="width: 100%;"></div>	Oct 22	★★★★★	

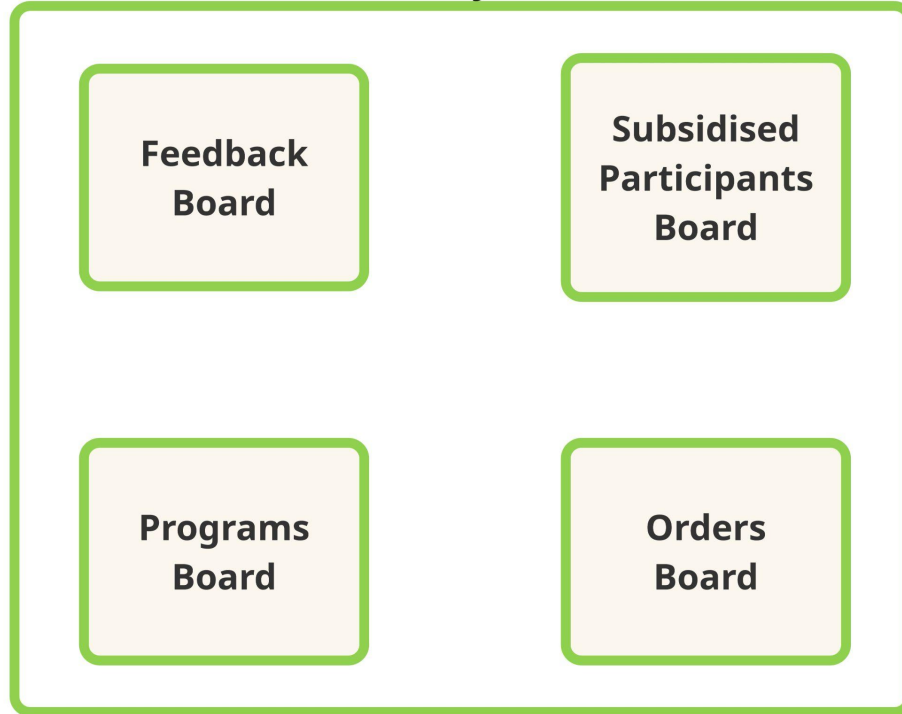
Monthly goals



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Centralising Data Storage

Monday.com



Monday Boards Overview

Feedback

Results from participant feedback forms post-course/workshop

Programs

All course and workshop information including SKU, date, number of participants registered, etc

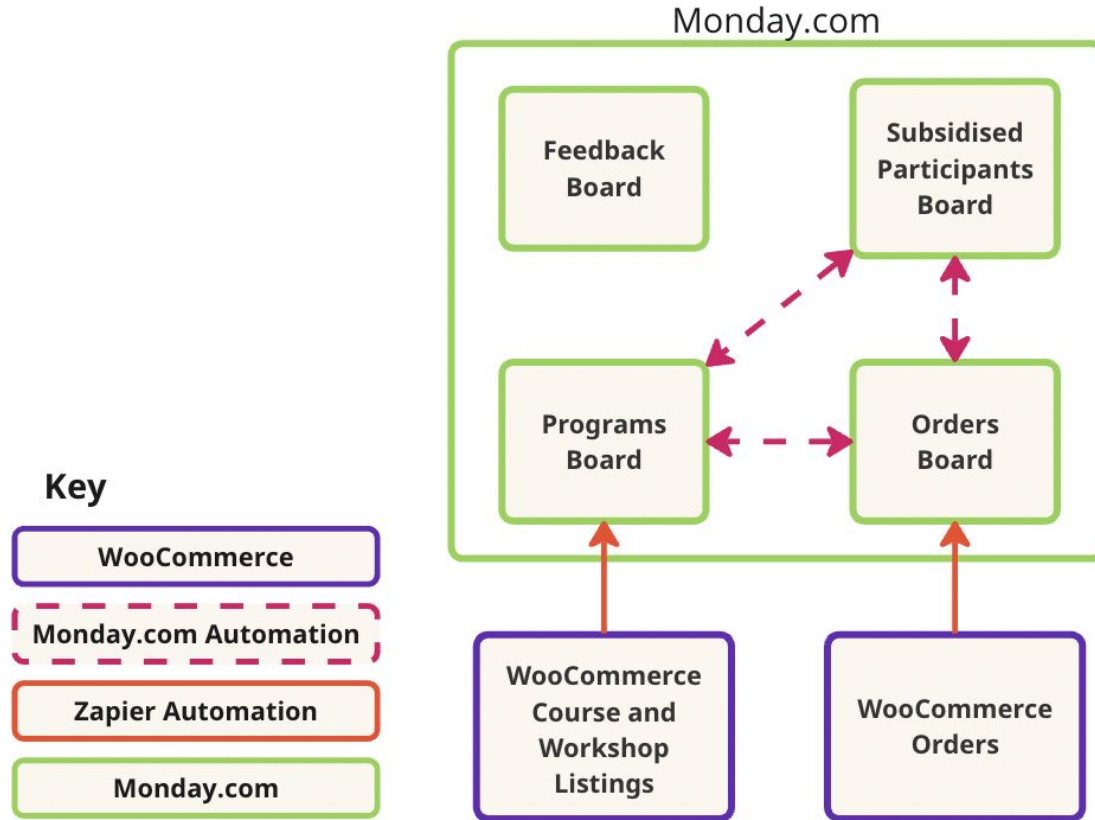
Subsidised Participants

Additional information about participants that receive subsidy

Order

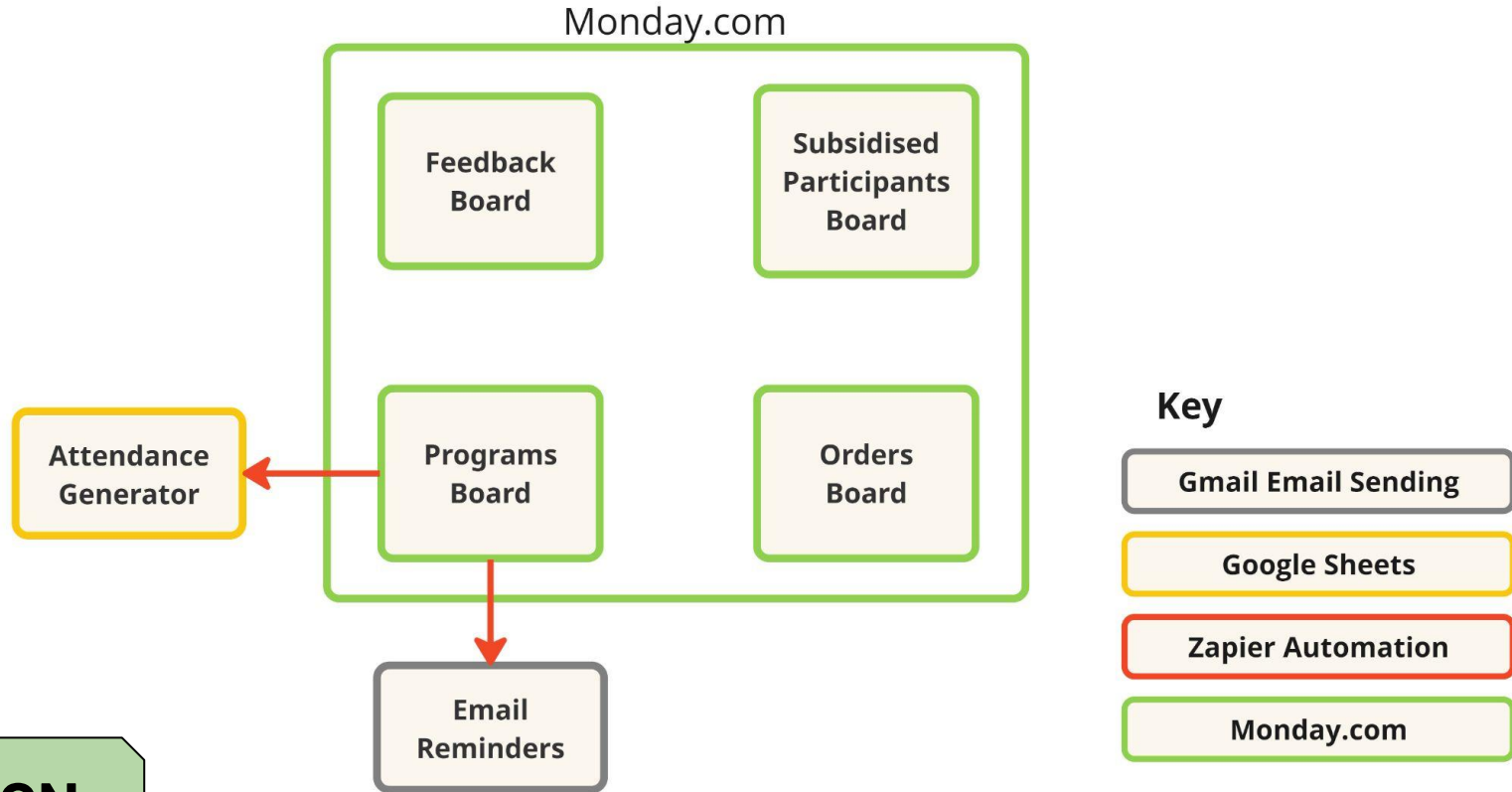
Booking information received from individual orders that occur on the website

Transferring Data Into Monday.com: Reducing Manual Entry



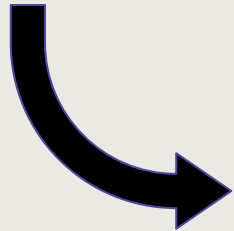
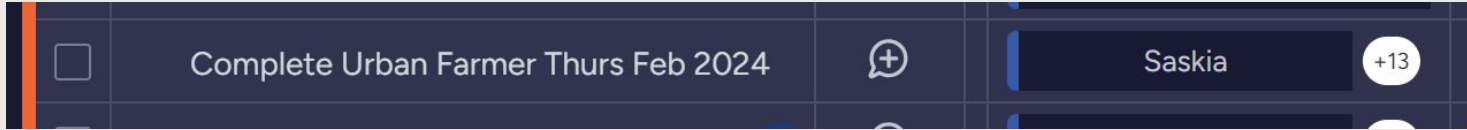
DESIGN

Centralised Programs Board



DESIGN

Email Reminders



Hi there

*Just a reminder regarding your enrolment in the **Complete Urban Farmer** course commencing **30/04/2024***

***Please meet your trainer Test Instructor outside the Visitor Centre at 12:45 PM.** The Visitor Centre is accessed via the entrance on the corner of Roberts and Stewart Streets. If you are running late, please stop by the Visitor Centre to obtain directions on where the class is meeting.*

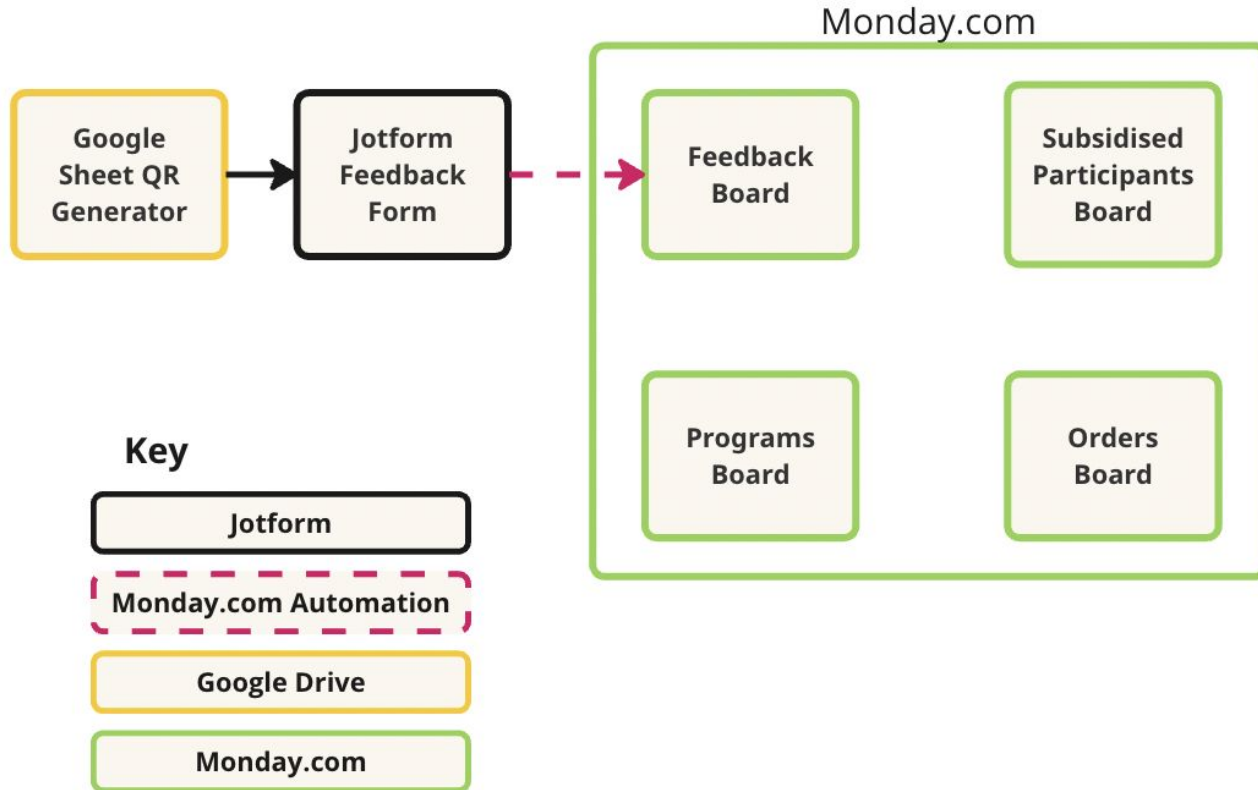
Attendance Form

Automatically generated attendance form

Intro to Landscape Gardening 2016-2017

Name	<input checked="" type="checkbox"/>
Heidi Williams	<input type="checkbox"/>
Juliet Lamont	<input type="checkbox"/>
David Bell	<input type="checkbox"/>
Zena Cumpston	<input type="checkbox"/>
Melinda Karabogias	<input type="checkbox"/>
Susanna de Leijer (also Lannen)	<input type="checkbox"/>

Keeping Data Within Monday.com



Reducing User Error: Prefilled Feedback Forms with QR Code

Auto Generated
Program QR Codes



Feedback form with
prefilled name

Course Name *

Bird Language

How did you hear about us?

- Word of Mouth
- CERES Website
- CERES Newsletter
- CERES Social Media

A feedback form with a white background and a thin brown border. It contains a text input field for "Course Name" with the value "Bird Language" and a radio button selection for "How did you hear about us?".

DESIGN

Reducing User Error: Prefilled Feedback Forms with QR Code

Auto Generated
Program QR Codes



Feedback form with
prefilled name

Course Name *

Bird Language

How did you hear about us?

- Word of Mouth
- CERES Website
- CERES Newsletter
- CERES Social Media

The feedback form is enclosed in a white rectangular frame with a brown border. It contains a "Course Name" field with a red asterisk and the text "Bird Language" inside. Below this is a question "How did you hear about us?" followed by four radio button options: "Word of Mouth", "CERES Website", "CERES Newsletter", and "CERES Social Media".

DESIGN

Data Reporting Supports The Growth Of A Non-Profit



Gain support from donors and sponsors

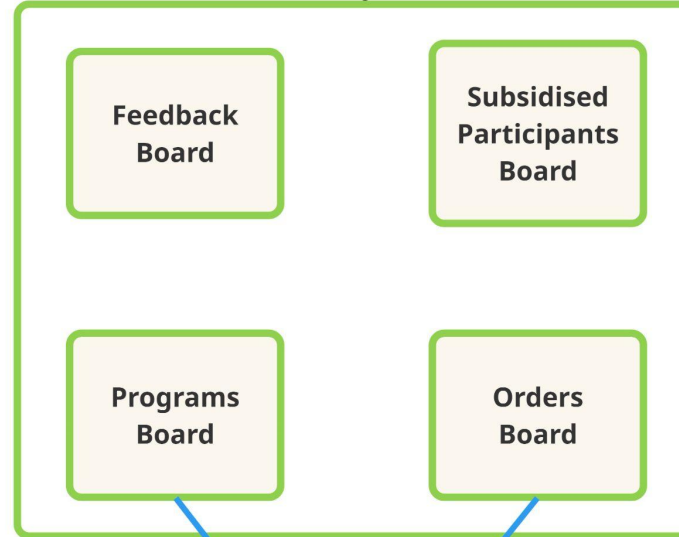


Show which programs need more support and which are profiting the most

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Dashboard Reporting

Monday.com



Key

Google Apps Script

Google Sheets

Monday.com

Dashboard Reporting

Financial Report

CERES Financial Report: Monday, 29/04/2024

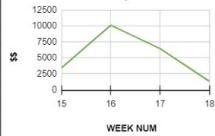
\$35,178.00

TOTAL REVENUE

\$25,802.00

TOTAL NET PROFIT

Net Profit By Week



\$426.18

AVG. COST OF WORKSHOP



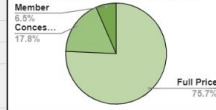
TOP 3 WORKSHOPS WITH MOST NET PROFIT

I. Herbal Apprentice April 2024 \$9350

II. Sustainable Gardening April 2024 \$3835

III. Feta, Halloumi & Mascarpone Cheese Making April 2024 \$3288

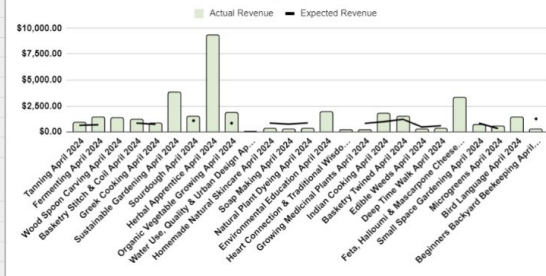
Distribution of Tickets



REVENUE BY TOPIC

Baking	\$0.00
Bees	\$220.00
Cheese Making	\$3,288.00
Cooking	\$2,655.00
Foraging	\$2,785.00
Gluten-Free	\$0.00
Growing Food	\$6,740.00
Herbalism	\$0.00
Home & Body	\$555.00
Indigenous Knowledge	\$150.00
Mechanics	\$4,943.00
Weaving	\$2,640.00
Woodwork	\$1,370.00
Other	\$9,832.00

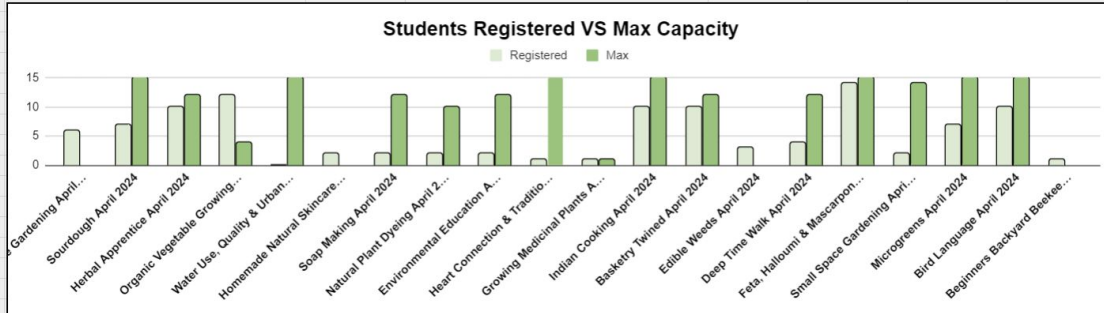
Actual VS Expected Revenue



DESIGN

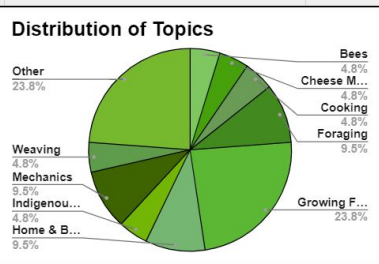
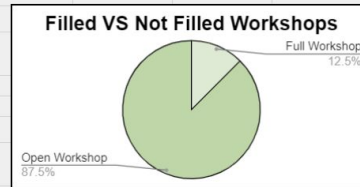
Booking Report

CERES Booking Report: Wednesday, 24/04/2024

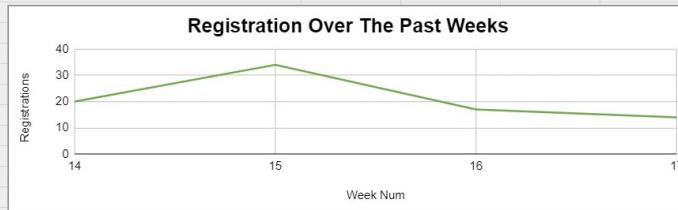


ENROLLED IN WORKSHOPS
88

ENROLLED IN COURSES
18



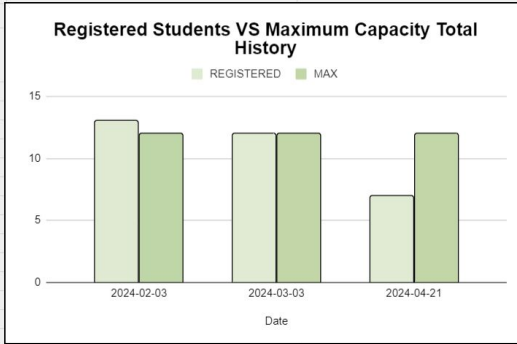
FULL WORKSHOPS
2



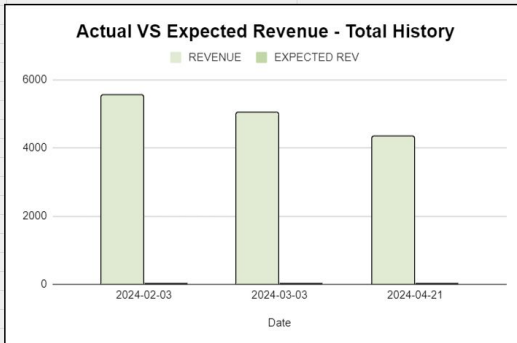
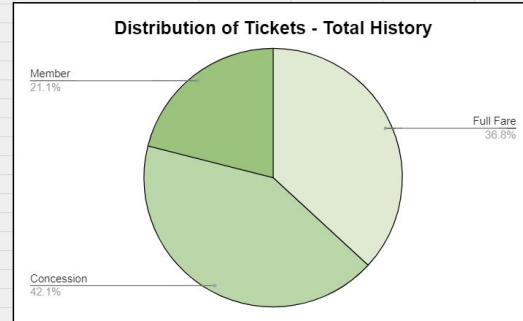
DESIGN

Individual Program Report

INPUT PROGRAM TOPIC HERE: Sourdough



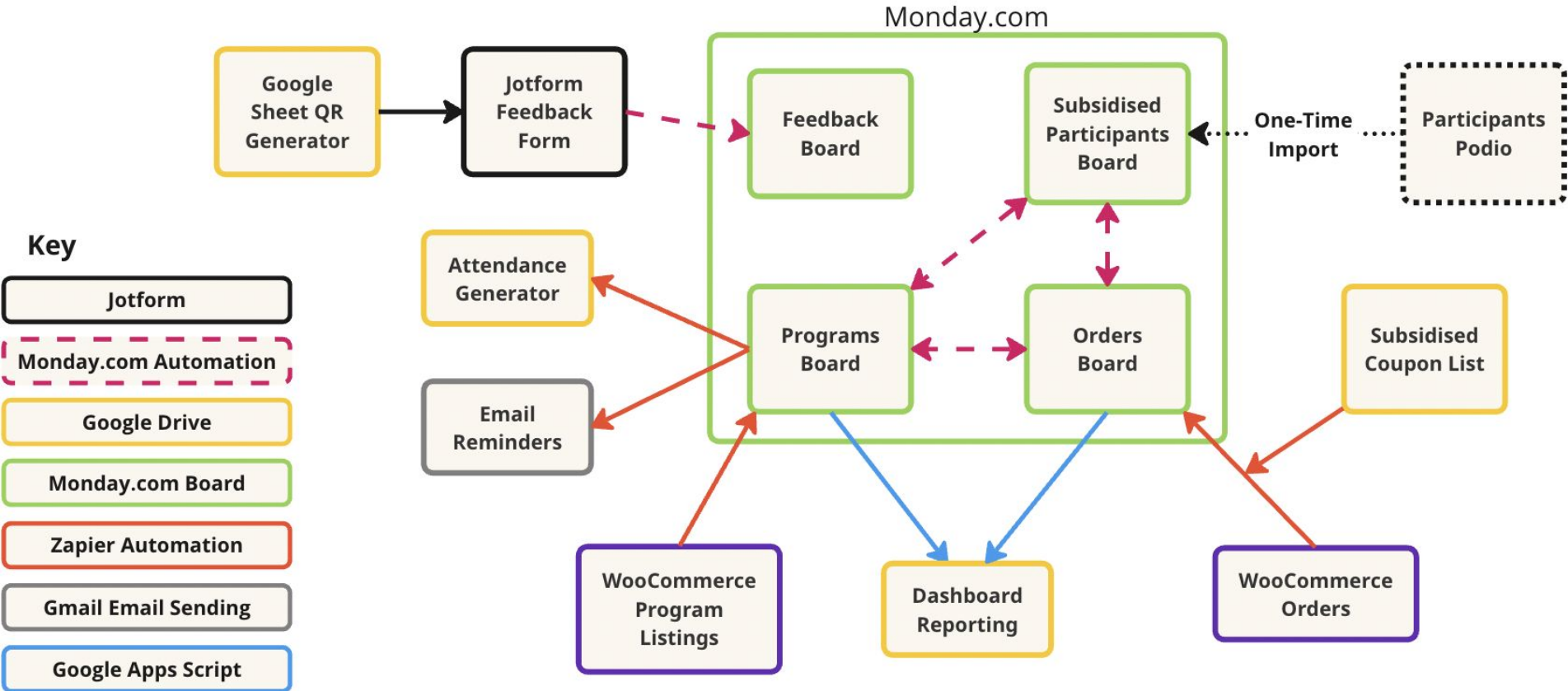
AVG. REVENUE
\$4,977.00



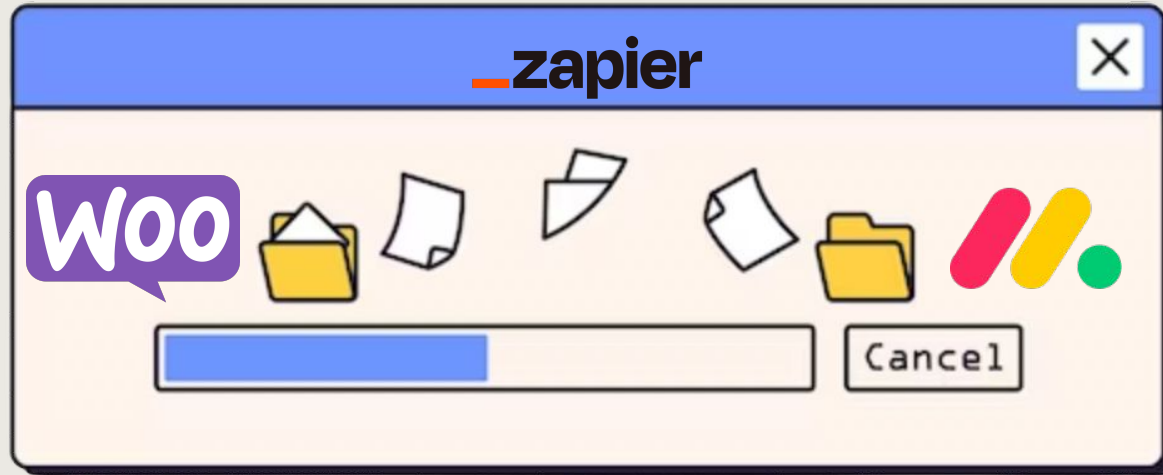
DESIGN

DESIGN

Overall Map



Testing Our Systems By Importing Data



Uncaught Errors Can Lead To Incorrect Data

Easy to Find Status for Errors that Need Attention

<input type="checkbox"/>	Ladd B		Needs Attention: Duplicate
<input type="checkbox"/>	Ladd B		Needs Attention: Duplicate

Needs Attention: SKU Not Found	AL-W-SORDOUGH-240203
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Different Staff Members Have Different Levels Of Technical Skills

Teaching Materials

Tutorial videos

User guides

The screenshot shows the Monday.com interface for a board titled 'Orders'. The left sidebar contains navigation options: Home, My work, WPI, Subsidized Particip..., Sessions, Orders (selected), Feedback, Session Planning, and New Dashboard. The main area displays a table with columns: Order, Status, Email, Phone, Date Filled Out, and Cou. The 'Status' column is filtered to show only 'Needs Attention' items. A large grey play button icon is overlaid on the table, indicating a video tutorial. At the bottom of the interface, there are navigation controls for a video player.

Tips

- Want to see all the versions of a course or workshop that have been run? Click the filter button and select one or more course/workshop topics to see this.

The screenshot shows the 'Quick filters' and 'Recent filters' panels in the Monday.com interface. The 'Quick filters' panel shows 'Showing 3 of 61 sessions'. The 'Recent filters' panel is divided into 'Topic / 1' and 'Group'. Under 'Topic / 1', there are filters for 'Small Space Ga... 3', 'Bird Language', and 'Organic Vegetabl...'. Under 'Group', there are filters for 'Top group', 'Missing Informati...', and 'In-Session Cours...'. A large grey play button icon is overlaid on the filters, indicating a video tutorial.

- You can look at an item's "Updates" (speech bubble icon) to see what emails have been sent out for that course

Technical Documentation For Bug Fixing And Future Expansion

Zapier

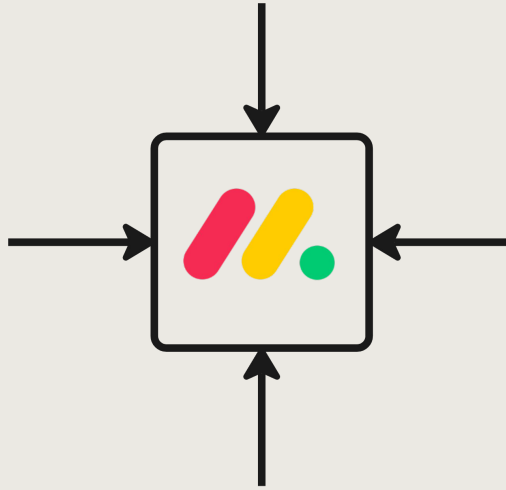
Courses / Workshops

It is important to note that courses/workshops are added to WooCommerce in 3's, with one "entry" for each ticket type (full fare, concession, and CERES member).

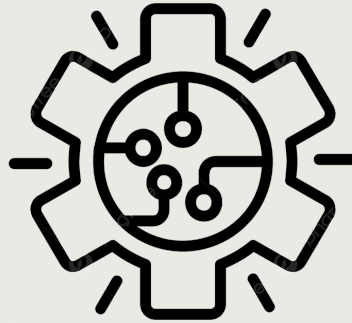
Course / Workshop Upload Zap

- The comprehensive workflow of this zap can be found on [THIS](#) Miro board
- This Zap takes courses/workshops added to WooCommerce, processes their data somewhat, then adds them to the "Programs" Monday.com board.
- The general workflow is that, of the 3 entries, 1 will be added to the Monday board and the other 2 will update ticket prices of that newly added Monday item)
- Workshops are added to the "Missing Information (Workshops) group, while Courses are added to the "Missing Information (Courses) group.

How our Project Aimed To Help CERES



**Data
Centralisation**



**Automate
Repetitive,
Tedious Tasks**



**Unlock Data
Insights**

Recommendations



**Continue
Transitioning to
Monday.com**



**Continue
monitoring
system**



**Continue to
improve
website
consistency**

Acknowledgements

Professor Stephen McCauley

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Mr. Jonathan Noble

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Ms. Karen Mengell

Ms. Chris Pendleton

Ms. Luisa Cardamone



Thank you! Any Questions?