

# Topic in Brief

## 2012 IDMG Summer School and Symposium

October 12, 2012

### Hundreds of UC staff participate in IDMG “I See in 3-D (Data-Driven Decisions) Summer School and Symposium

#### EXECUTIVE SUMMARY

For a second year, the Institutional Data Council (IDC) sponsored an interactive summer school to advance the Institutional Data Management & Governance (IDMG) initiative on the Berkeley campus. The 2012 IDMG Summer School was wildly popular, with hundreds of staff participating from Berkeley, along with the UC Office of the President (UCOP), UC San Francisco (UCSF) and UC Riverside.

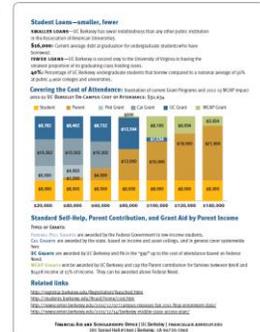
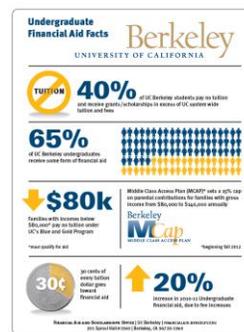


This year’s IDMG Summer School ended with a capstone symposium featuring Cal alum and Stanford Assistant Professor Jeff Heer speaking on “Interactive Data Analysis” and visualization tools that help make sense of large data collections. In addition, three winners of our first IDMG Data Visualization Contest described their submissions and the process of analyzing and presenting those visualizations.

This briefing note provides additional information on the content, feedback, and continued efforts to promote IDMG through communication and staff development.

#### SUMMER SCHOOL

The focus of the 2012 IDMG Summer School was “I See in 3-D (Data-Driven Decisions). Sessions were organized with the support of the Business Process Analysis Working Group (BPAWG), Cal Assessment Network (CAN), Learning + Organizational Development (L+OD), Operational Excellence (OE), Policy Analysts Roundtable and Office of Planning & Analysis (OPA) staff.



Erin Gore, Associate Vice Chancellor-Chief Financial Officer (AVC-CFO) and IDC Chair, kicked off Summer School 2012 by introducing the **Creating a Catchy One-Pager** session led by Ram Kapoor from Public Affairs. Ram guided participants through the steps he used to create a catchy two-pager about Financial Aid (seen above). He highlighted a couple key points

that “less is more” and “facts impress, but stories inspire” and shared tips and techniques on how to pull together a similar document, including how many concepts/points to cover, choosing what to highlight, and tailoring the information to your audience.



Then Ram and Hulda Nelson (also from Public Affairs) asked participants to break into small groups and create their own one-pagers with the goal of encouraging Oracle’s Larry Ellison to use stock proceeds to fight poverty. Some of the results from this exercise can be found in the appendix of this document.

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**“I really liked the catchy one pager session. It was probably one of the best ways of presenting data. I would definitely like to implement this more into my work.”**

**IDMG Summer School Participant**

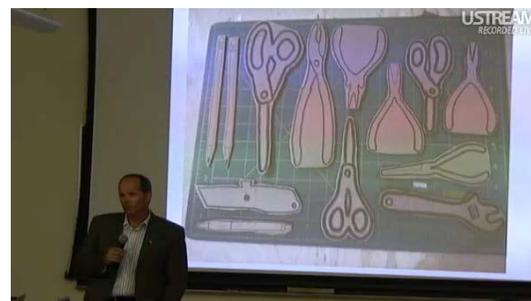
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Pamela Brown, OPA Executive Director and IDC member, introduced the second session on **Collaborative Tools**. Patrick McGrath, Information Systems & Technology, provided an overview to collaborative tools, including wikis, blogs, forums, tasks, events/calendars and document sharing. Then Patrick, along with Mary Washburn and Karin Bliman, provided a deep dive into Confluence Wiki,

enterprise content management tools (e.g., CalShare and Research Hub) and simple file sharing (e.g., Box and Google Drive).

Jeannine Raymond, Assistant Vice Chancellor – Human Resources and IDC member, introduced the third session on **Cal Answers**, Berkeley’s enterprise data warehouse reporting tool. Art Gong from OPA and Equity & Inclusion demonstrated how to get student information and then Josh Blatt from OPA and IDC shared the road map of upcoming additions and enhancements for Cal Answers.

Louise Davidson, Berkeley’s new Metrics Coordinator, introduced the fourth session on **OSKI Metrics**. This project was the result of the Operational Metrics Project completed through L+OD’s Leadership Development Program. This project focused on how a team or unit can develop a fair, simple, transparent measure of its ability to accomplish its goals. Project team members Daniel Roddick, Layla Naranjo, and Rebecca Andersen presented a Metrics Toolkit and recommended implementation plan and led attendees through a metric-building activity.



Interim Chief Information Officer and IDC member Lyle Nevels kicked off the fifth session on **OE Productivity Suite (PS) Tools**. PS Project Change and Communication Manager Inez Bailey discussed the migration of CalAgenda, the implementation of the Google tools, and the many benefits of collaboration in the future environment.

The last session moderated by Greg Dubrow, Director of Research & Policy Analysis in the Office of Undergraduate Admissions, was a **panel discussion on how decision-makers use information**, what they need, what they want and how they want it. Panelists included Andrew Szeri - Dean of the Graduate Division and Operational Excellence Program Office Faculty Head; Erin Gore – AVC-CFO; and Ivor Emmanuel - Director, Berkeley International Office.



Participants either came in-house or watched a live video stream. Everyone was encouraged to register in the Learning Center so they could keep a record of the training they received. Furthermore, all session handouts and archived videos are available on-line through the IDMG website (which also continues to store comparable information from the 2010 IDMG Summer School that focused on “Tips and Techniques for Presenting Data.”)

**IDMG Summer Series Participants**

	In-House	Live Stream	Archive View
Catchy One-Pagers	60	70	85
Collaborative Tools	41	69	45
Cal Answers	43	41	44
OSKI Metrics	36	36	34
OE Productivity Suites	63	45	82
Who's Got the D?	38	45	53

Note: Archived views are as of October 8, 2012.

**What was the single most valuable thing you learned?**

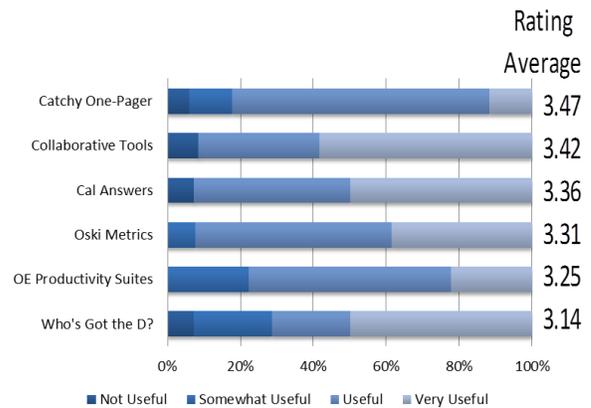
*“That CAL is starting to have/develop tools to collect and more importantly share data (Cal Answers).”*

*“That the campus has an appetite for graphical representations of data as opposed to just white papers with tables.”*

*“I’m a newcomer to campus working on metrics. It was incredibly useful to understand what is going on at UCB. Very impressive developments and saved me a lot of time to view the archived sessions. I thought it was great!”*

*“I really enjoyed engaging with other brilliant dynamic people on campus that I would not have encountered otherwise.”*

**Majority of Survey Respondents Found Sessions Useful or Very Useful**



## SUMMER SYMPOSIUM

Over 120 staff attended the IDMG Summer Symposium, including around 20 staff from the UCOP and UCSF. The word cloud below displays the job titles of participants who registered through the Learning Center for this symposium.



Erin Gore, AVC-CFO, kicked off Berkeley's first IDMG Symposium and introduced keynote speaker Jeff Heer who highlighted some of the tools his lab had developed to produce data visualizations. He described how these data visualizations have also been used to clean and analyze data, as well as present it.

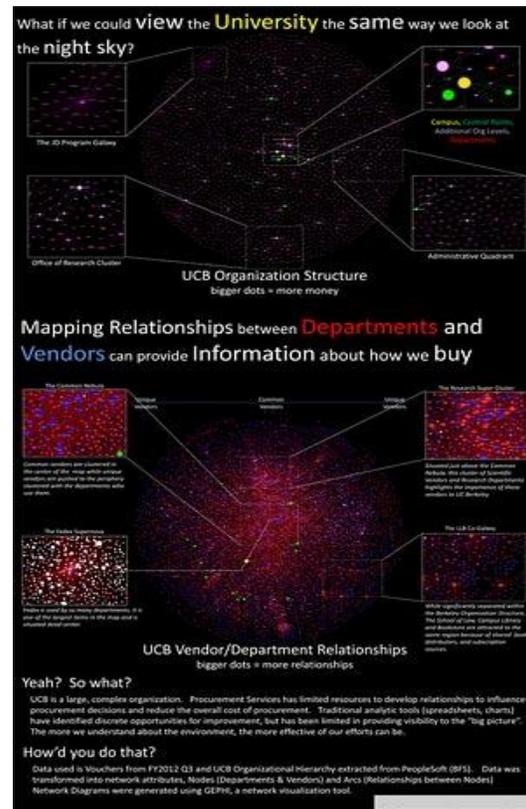
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**"Jeff Heer's Data Wrangler is an awesome tool! My distant wish (dare I say dream) would be to create a tool specific to the kind of data I handle."**

**IDMG Symposium participant**

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Then the three data visualization winners presented their projects and the process they followed to analyze the data and create the visualizations. UCSF's Greg Macway was winner of the most creative visualization. He mapped campus BearBuy data into celestial formations to illustrate department-vendor buying patterns.



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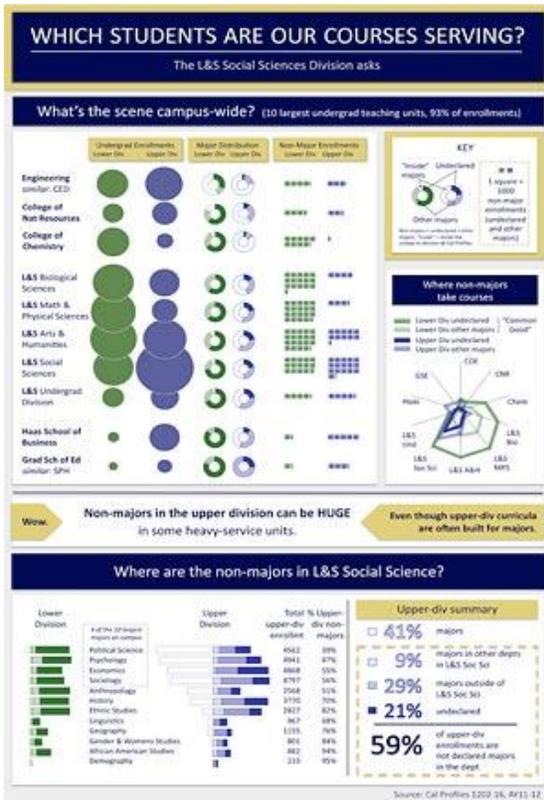
**"It was great to learn how each of the symposium winners approached the creation of their visual displays."**

**"While everything I saw was interesting, the most useful is when people talk or demonstrate what they were attempting to do, how they worked through it, and how the end result was accomplished.."**

**IDMG Symposium participants**

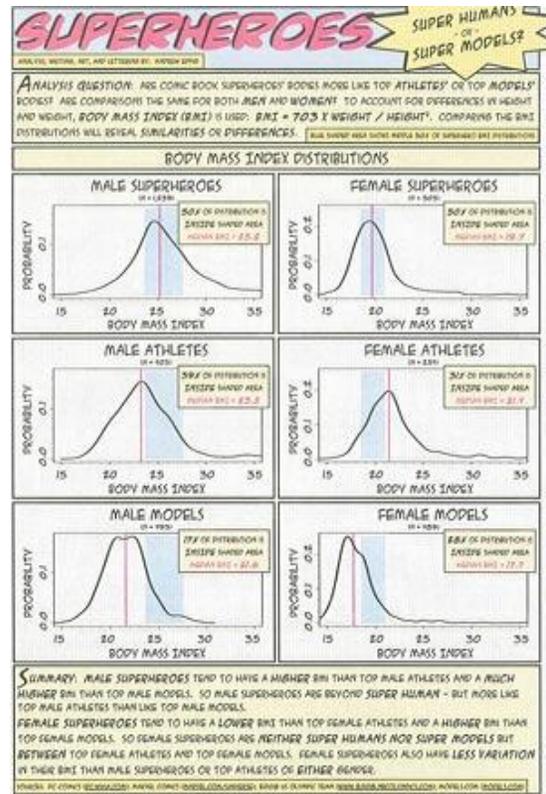
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Cathryn Carson, an associate professor of history at Berkeley, won for clearest visualization with her social-science supergraphic.



Andrew Eppig who works with OPA and for Equity and Inclusion was the overall winner with his supergraphic that blended creative, data-intensive and narrative qualities into comic book-themed analysis.

“This is about more than visuals and all three winners presented an extensive amount of complex data that conveyed their message in a clear, concise, meaningful and engaging manner,” Gore said. “As a one-pager, Andrew’s data visualization was extremely creative and provides enough information that it can stand by itself and convey its findings in a narrative that can be readily understood.”



## IDMG SUMMER SCHOOL AND SYMPOSIUM COVERAGE

The Berkeley NewsCenter covered the IDMG Summer School and Symposium, as well as highlighted IDMG initiative progress, in an article entitled “Making Hard Data Easier to Manage.”

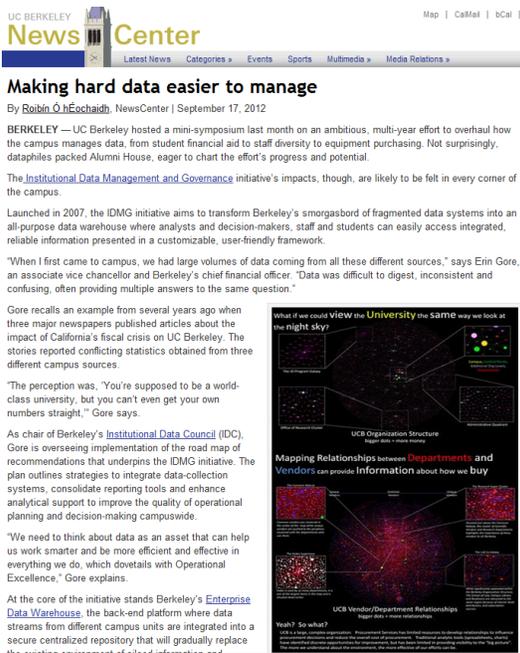
“We need to think about data as an asset that can help us work smarter and be more efficient and effective in everything we do, which dovetails with Operational Excellence,” Gore explains.

Berkeley’s Office of Equity and Inclusion recently secured a multi-million-dollar grant from the Evelyn and Walter Haas Jr. Fund to expand diversity initiatives on campus. Rather than develop its own new reporting system, the office allocated a portion of the five-year award to build the diversity-data project within Berkeley’s new EDW infrastructure.

**“The symposium was the perfect way to close out the summer school series because it gave the group an opportunity to discuss discrete projects put together by colleagues,” Gore said. “The contest provided the campus with great examples of what IDMG is all about and demonstrated what our staff can achieve when they combine their talent with the right tools.”**

**Extracts from “Making Hard Data Easier to Manage”**

This article was posted on the Berkeley home page for almost a week and distributed through the on-line Berkeleyan, significantly expanding our reach to other faculty and staff across the campus.



**FUTURE STEPS**

The team of staff who came together to organize the 2012 IDMG Summer School and Symposium are already planning what's next based on feedback we received.

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**If IDMG Summer School was offered in the future, what would you recommend??**

***“I would recommend that Senior Leaders participate again from time to time to demonstrate their on-going commitment.”***

***“Some of us are not data analysts by trade, so some suggestions on where and how we can get fundamental training working with data would be great.”***

***“I don’t know if it would be possible, but I would love to do something hands on – perhaps learning how to use a really cool graphing technique.”***

***“Have materials available the day before the actual session.”***

***“It gets better every time! Perhaps have a session on website communication and provide templates people can use across the campus.”***

***“External speakers are great. They help us think beyond the campus bounds so we can get a big picture perspective from others who stimulate creativity.”***

**IDMG Summer School and Symposium Participants**

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## APPENDIX: CREATING A CATCHY ONE-PAGER (LESS IS MORE)

Below are examples of catchy one-pagers created by IDMG participants with the goal of encouraging Oracle's Larry Ellison to donate a portion of his stock to help fight world poverty.

**WE HAVE A PROBLEM**

**22,000** CHILDREN Die every day

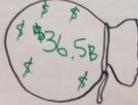
They die quietly in the poorest villages on earth, far removed from the scrutiny and the ~~press~~ **CONSCIENCE** of the **WORLD**

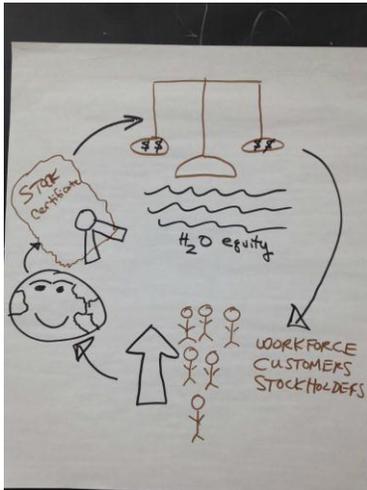
**THE SOLUTION...**

Global Priority	Billions
① Pet foods	17
② Military spending	780
Water + sanitation	9

**EVEN A SMALL SHIFT CHANGES LIVES!**

 <p>1/2 OF HUMANITY LIVES ON LESS THAN \$2.50/DAY</p>	 <p>1/4 humanity lives w/out electricity</p>
 <p>1.8 BILLION children die of diarrhea each year</p>	<p>5¢ per day per child will end poverty in 1 generation</p>

\$36.5B Larry's Net Worth	\$35.5B Bill Gates Endowment
Larry is ?	Bill is Well Endowed
<b>LEGACY</b>	
 <p>1.8 billion children are dying...</p>	



Stock Options

H<sub>2</sub>O equity

WORKFORCE CUSTOMERS STOCKHOLDERS

77% of Resources are consumed by 20%

**PRIORITIES?**

- \$12 BILLION ON PERFUME
- \$11 BILLION ON ICE CREAM
- \$105 Alcohol

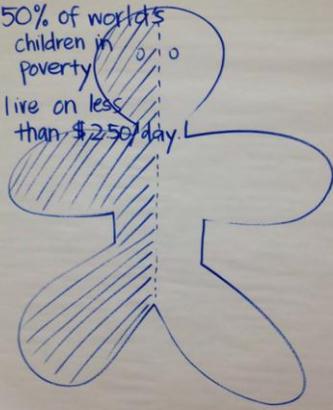
\$2.50 per day

1 BILLION IN POVERTY

10.6 MILLION DIE

900 MILLION NO ACCESS TO SAFE WATER

50% of world's children in poverty live on less than \$2.50/day



1.4M children die annually w/o safe water

1 crank saves X

2 cranks saves XX

3 cranks saves XXX!

So crank it up!

If you live you might go to school > might get out of poverty

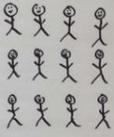
Super Ellison saves the world

you can live w/o healthcare but can't live w/o water

1 SHARE OF ORACLE

\$30

=



**12B**

**80%**

Live on less than \$10.00 Per day...

- 2.6 billion lack basic sanitation
- 800,000 children die per year due to poverty
- 640 million without adequate shelter

A Bold problem requires a bold leader

WHAT DO  
YOU WANT  
YOUR  
LEGACY  
TO BE?

HOW DO YOU WANT TO BE  
REMEMBERED?