

Managing the Messy Middle

Change Management Lessons
from Selecting & Implementing a
New Data System

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Brief Background

Non Profit in San Francisco Bay Area- 60 staff

- Serves 3 distinct populations, variety of services
 - 4 Distinct Service Departments -> 1 Organization
- Wide range of tech/data experience
- Wide culture/work/age ranges

Case Study: 2025- present

- Changing Electronic Health Record/Client Case Management System

Start with The Why

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What were we trying to achieve?

1. Better compilation of data across services
2. Better fit for more services
3. Better reporting
4. Future integration possibilities
5. Sustainable Product
6. Common language as part of process
7. Inclusion in decision making



Messy Middle: Many Steps

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Reinforce Expectations

We use data to drive decisions

We are all learning

Perfection is not possible

Change is hard

People need certainty more than answers



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Many, Many Steps

Which to Evaluate?



Who will Evaluate?



How to Evaluate?



Choose/Implementation (new messy middle)

Using Non Negotiables

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What must/can our next system do?

Each area created 5 Non Negotiables and provided #

- On scale if 0-1, do we think this system will work for us?
- Looking for 85% to move forward with selection
- Landed at 90% yes
- Compared to Current System at 42%

Set expectations for compromises



Go Live $\neq$ Done

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Using Non Negotiables to Gauge Progress

Previous System = 42%

New System (ideal) = 90%

Go-Live Reality = 18%

Future State = Estimated 68%+?



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The Human Side of Change

Embrace Human Nature

- Communication/Reporting progress
- Set Expectations
 - Support
 - Requests
 - Training
 - Feelings
- Go back to why & data



Lessons We're Still Learning

- Define the Why- Revisit This Often
- Use data for perspective
- Manage expectations & embrace feelings
- Share progress regularly
- Celebrate milestones/acknowledge challenges



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Resources I Can Share

- Excel Template to gather data
 - Evaluation Questions
 - Non Negotiables Questions
 - Post Implementation Eval
- Starting Process “Guide” for Database Evaluation

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We can change the world
when we **change our
approach to technology.**



From Data Cleanup to Data Culture

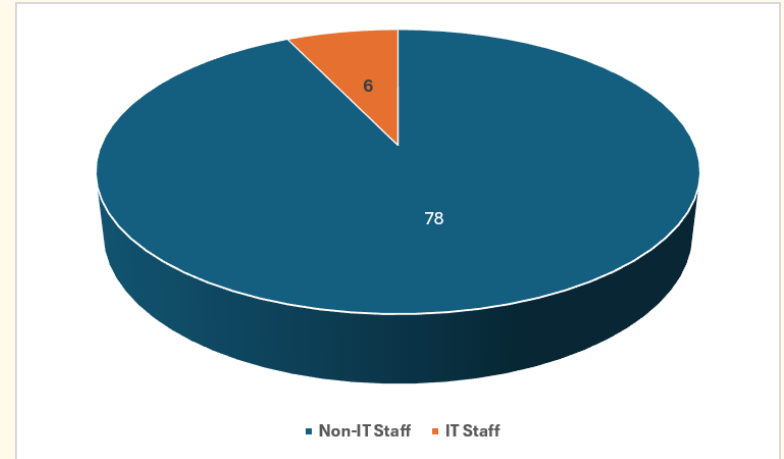
Building Data
Governance at
Vancouver Foundation



Senior Manager, Data & Innovation
charlotte.fox@vancouverfoundation.ca
[linkedin.com/in/charlotterfox](https://www.linkedin.com/in/charlotterfox)
[vancouverfoundation.ca](https://www.vancouverfoundation.ca)

vancouver foundation

- Established 1943
- \$2.05B+ granted
- 2,500+ funds



Challenges (c. 2022)

**siloed
teams**

The diagram features a central orange circle with the text 'siloed teams'. Below it are four light blue, rounded rectangular boxes, each containing a challenge. The challenges are: 'Inconsistent data practices', 'limited shared data definitions', 'multiple systems & storage locations', and 'unclear accountability'. A faint, empty rectangular box is visible on the left side of the slide.

Inconsistent
data
practices

limited shared
data
definitions

multiple
systems &
storage
locations

unclear
accountability

Discovery

We couldn't govern what we couldn't see...

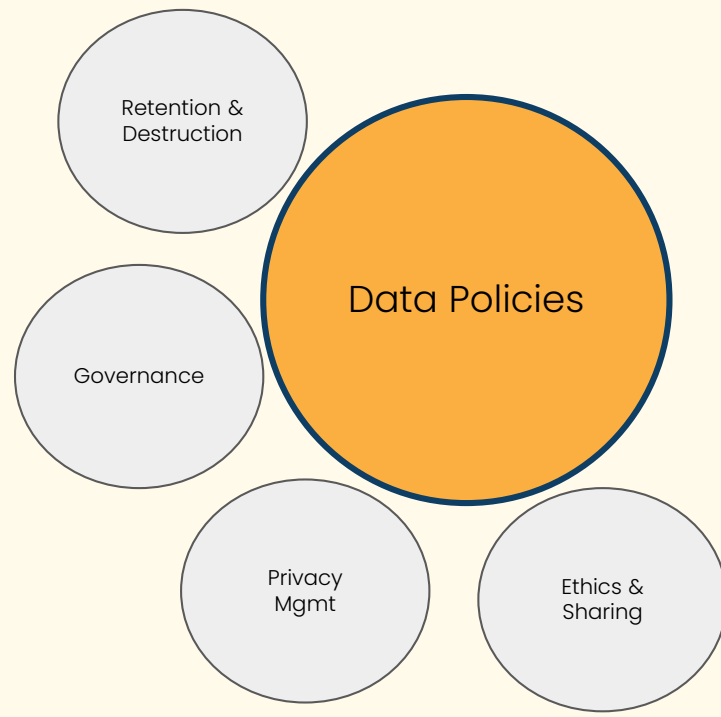
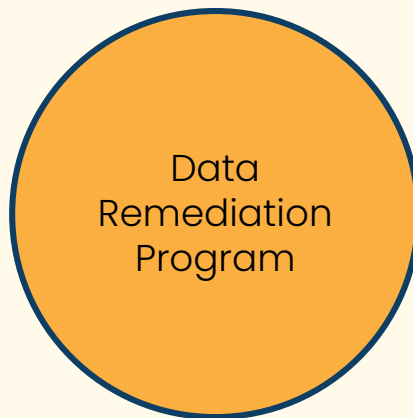
**What data do
we have?**

**Where does it
live?**

**How sensitive is
it?**

Initial Approach

Start small, build structure:



The Reality

What was hard:

- Data quality issues were widespread
- Limited staff capacity & technical literacy
- Resistance to change & lack of buy-in
- Legacy technology constraints
- Perception that data was IT's responsibility

The people challenges were
harder than the technical
challenges.



Accomplishments

~44,000
records
remediated

executive
sponsorship
secured

strong data-
related policy
stance

dedicated
**Data &
Innovation**
team

strong
governance
bodies

**clear pathway for future
governance**

An Unexpected Outcome

Governance-Enabled Modernization



Start by understanding
**what data you have
and where it lives**



Governance is not an IT
responsibility; **it's an
organizational responsibility**



Don't wait for the perfect
framework; start with
regular conversations about data



Thank You!



Do's & Don'ts *of using AI for* Data Visualization

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Let's use AI to
visualize some data

	A	B	C
1	Year	Neighborhood	Average literacy level
2	2015	Spring Garden	9.2
3	2015	Fishtown	5.2
4	2015	Chestnut Hill	6.7
5	2015	West Oak Lane	9.4
6	2015	Fairmount	8.8
7	2015	University City	

Using this data, make me a chart showing mean literacy levels.

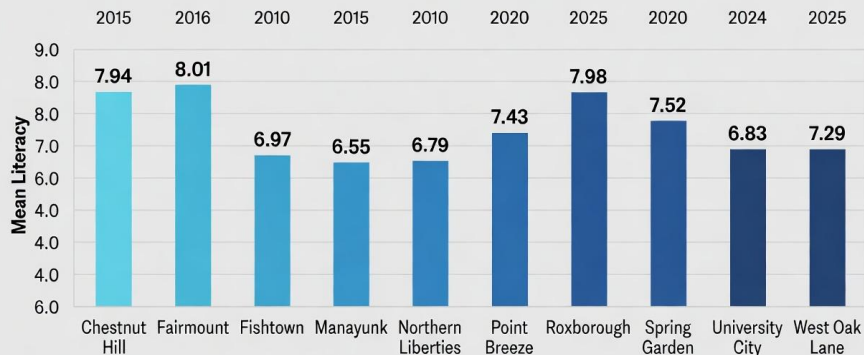


Medium ▾



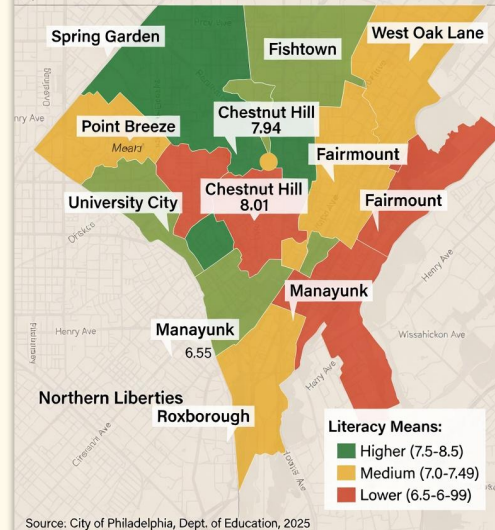
This **doesn't** work

Mean Literacy by Neighborhood (2015-2025)



Source: City of Philadelphia, Dept. of Education & Local Census Data
Data rounded to two decimal places for clarity.

Literacy Levels in Philadelphia Neighborhoods 2015-2025



This doesn't work

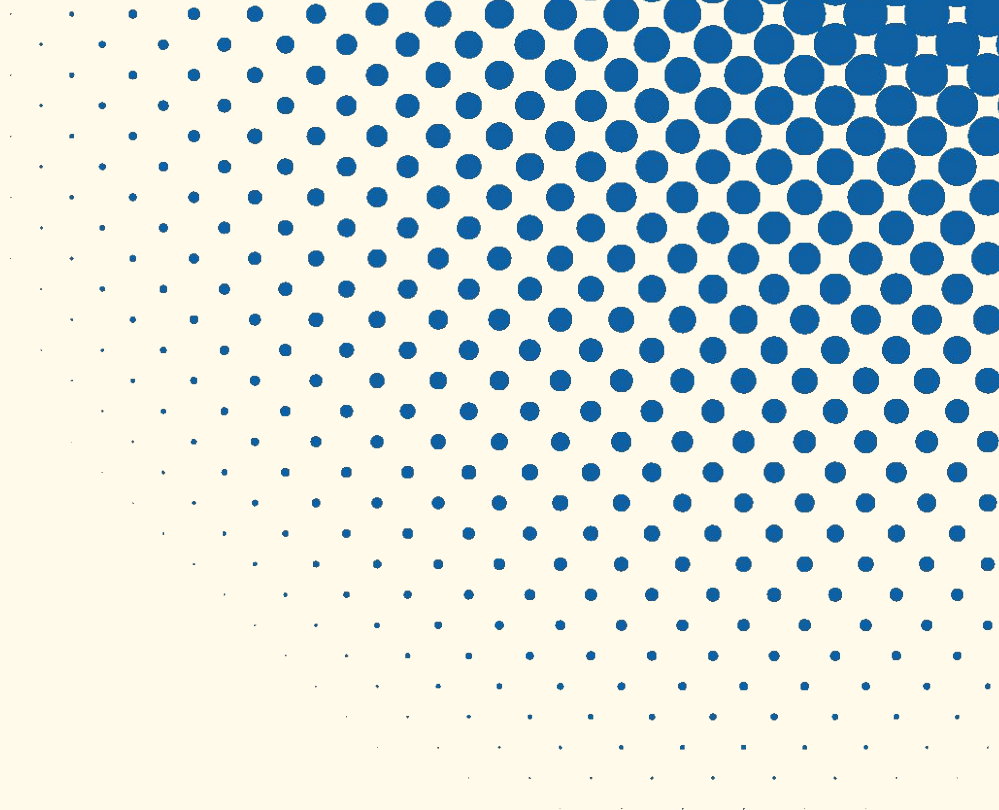
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Case Study

Visualizing survey results

Mott Foundation / Focus on Flint

FocusOnFlint.org



Focus on Flint

rich, diverse, and community energy

CREATING
WELCOMING, VIBRANT
OUTDOOR SPACES
FOR ALL FLINT RESIDENTS

How to vote

STEP 1: Select a park to see the available ideas for improvements.

STEP 2: Click the checkboxes to vote for the ideas you want to see happen. You can also write in your own ideas. You can vote for up to **three parks** and up to **three projects** per park.

STEP 3: Press **Submit My Vote** at the bottom of the page.

Parks and playgrounds create spaces for residents of all ages to gather, play and enjoy the outdoors. These spaces add a lot to quality of life.

In February, the Mott Foundation announced we would grant up to \$20 million to improve playgrounds and parks throughout the city of Flint. We began by granting more than \$7 million to Flint Community Schools to improve playgrounds at five elementary schools.

This is one of several initiatives the Foundation is supporting as we continue in partnership with our hometown of Flint and communities around it to hear from residents about their priorities for city parks throughout Flint.

You have until June 6 to vote on what you'd like to see in your favorite city.

The input we receive will help inform our grantmaking throughout the year. Below is a list of parks owned by the city of Flint. You can share your preferences. Once you choose a park, you can select up to three projects you want to see.

Thank you for helping to make Flint parks even better!

For more information, please visit mott.org/parks or call 810-238-5653.

Aldrich Park

Bassett Park

Brennan Park

Broome Park

Burroughs Park

Chevy Chase

Clara Hilborn Park

Cook Park

Cronin Derby

Dewey Park

Dort Park

Durant Park

Eldorado Vista Park

Farmwood Park

Fleming Park

Broome Park

- ☐ Add skate park.
- ☐ Baseball field improvements.
- ☐ Add paved walking path.

- ☐ Add pavilion/picnic area (tables and grills).
- ☐ Add outdoor workout equipment.
- ☐ Update existing soccer goals.

- ☐ Renovate basketball court.
- ☐ Add a nature playscape.
- ☐ Repair parking lot.

Enter your own ideas:

Close

Focus on Flint rich, green, and community spaces



How to vote

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You have until June 6 to vote on what you'd like to see in your favorite city.

The input we receive will help inform our grantmaking throughout the year. We won't be able to fund every project, our goal is to make improvements city-wide.

Below is a list of parks owned by the city of Flint. You can share your vote for a park. Once you choose a park, you can select up to three projects you want to see happen.

Thank you for helping to make Flint parks even better!

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Aldrich Park	Basset Park	Brennan Park
Broome Park	Burroughs Park	Cherry Comm
Clara Hilborn Park	Cook Park	Cronin Derby
Dewey Park	Dort Park	Durant Park
Eldorado Vista Park	Farmwood Park	Fleming Park

\$20 million

44 parks

1,444 total responses

1,250 write-in ideas

Broome Park

- ☐ Add skate park.
- ☐ Baseball field improvements.
- ☐ Add paved walking path.

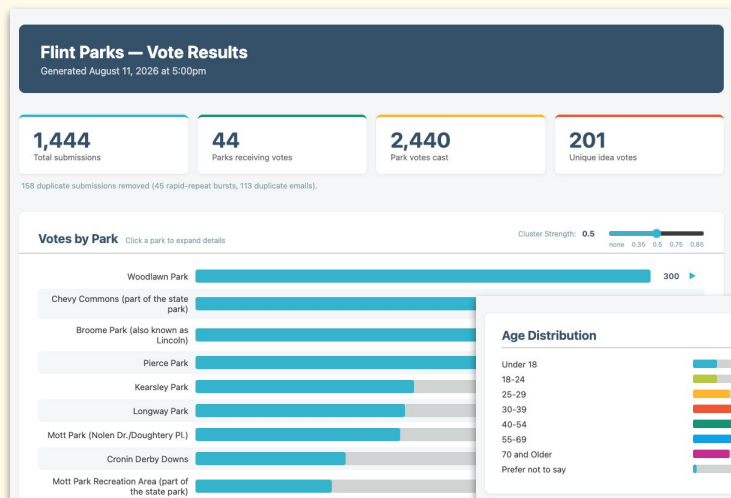
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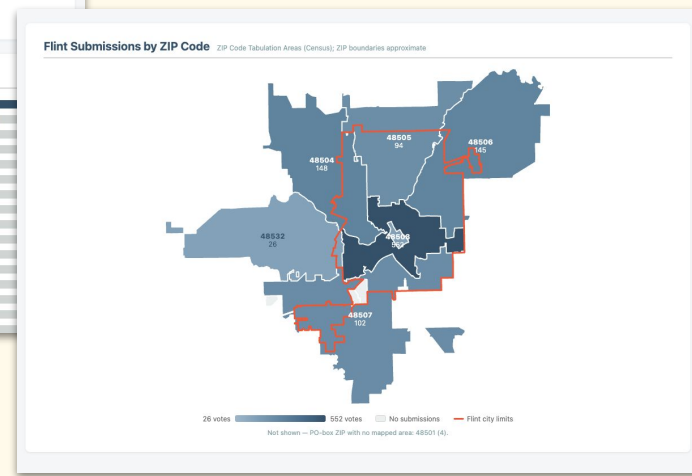
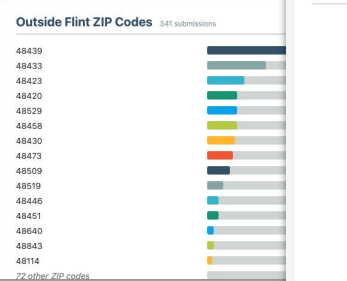
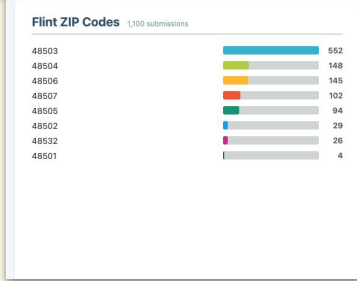
Enter your own ideas:

Close

Let's make some charts.



Let's make some charts that are **accurate, verifiable** and **deterministic**.



Votes by Park

Click a park to expand details

Cluster Strength: none



Broome Park

221



Add skate park.		143
Add pavilion/picnic area (tables and grills).		46
Baseball field improvements.		44
Repair parking lot.		41
Renovate basketball court.		34
Add paved walking path.		32
Add a nature playscape.		26
Add outdoor workout equipment.		13
Update existing soccer goals.		12

WRITE-IN IDEAS

<i>Install new field lights</i>		3
<i>Football field</i>		2
<i>New Field Lights</i>		1
<i>Pool with diving board</i>		1
<i>Fenced dog park</i>		1
<i>Lighting</i>		1
<i>public pool/ice skate rink like my dad said it used to have</i>		1
<i>A Skatepark / Pump Track would be a great addition to the area!</i>		1

Votes by Park

Click a park to expand details

Cluster Strength: 0.35



Broome Park

221



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WRITE-IN IDEAS

► Field Lighting Improvements		7
► Artificial Turf Installation		5
Football field		2
► Dog Park Creation		2
A better way of keeping atvs and motorbikes out of the park would be nice. I don't know if we could add wire through the fence posts or something? People keep driving through the fence posts as well.		1
Basketball court		1
Leave several areas UNMOWED year round for		

Votes by Park

Click a park to expand details

Cluster Strength: 0.35



Broome Park

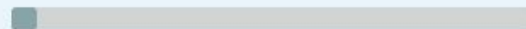
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WRITE-IN IDEAS

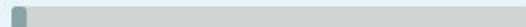
▼ Field Lighting Improvements



7

Install new field lights x3
Lights for baseball field
New Field Lighting
Fix Field Lights
New Field Lights

▼ Artificial Turf Installation



5

Put artificial turf on infields
install artificial turf on infield
Artificial Turf

Votes by Park

Click a park to expand details

Cluster Strength: 0.35



Broome Park



221 ▼

Add skate park.		143
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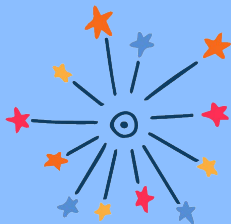
Cluster Strength	Number of groupings
none	946
0.35	737
0.50	621
0.75	349
0.85	135

Improvements		7
lights x3		
ball field		
ing		
ts		
installation		5
on infields		
install artificial turf on infield		
Artificial Turf		

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Do **this** not **that**

- **Don't** let your AI system generate an **image** of a chart, graph or map.
- **Do** have it **write the code** for you that performs the analysis or charting you want.
- **Do** make sure any data analysis, charting, or dataviz is **verifiable** and **deterministic** even if it uses AI in its process.



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Thank you!

Nathan Gasser

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ReportKitchen.com



Dashboard Design and Adoption





I'm Jess!

1. Maryland Legal Aid is a non-profit law firm
2. 400+ Staff**
3. Our teams work across the state of Maryland
4. Data Analytics & Insights department created in 2024

**Count includes our subsidiary, Maryland Center for Legal Assistance

Case Study

When our organization wanted to begin building dashboards to analyze our data and use what we learn for storytelling, we quickly realized we faced some realities:

- Data living in multiple sources
- Similar datapoints were titled/structured differently from one system to another
- Our data story is evolving



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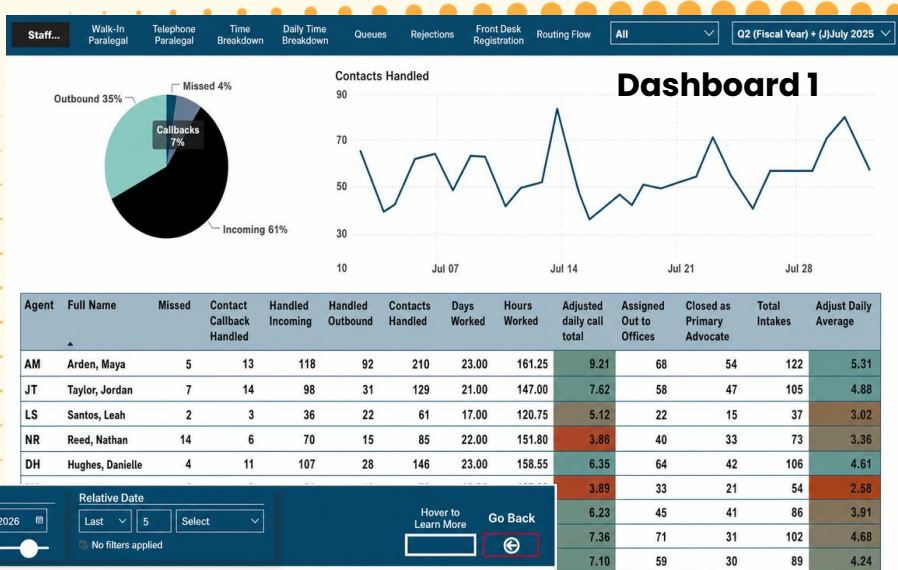
Same principles
applied for our
dashboard builds

Tool Selection: Choose
dashboard tool based
on the team's current
need

Testing Windows: Build
dedicated time into the
schedule for testing

Early Feedback: Gather
feedback early in the
design process.

Collaborative Planning: Plan
time for discussion about
the dashboard



*** all artificial
data in
screenshots*



Key Takeaways

1. Match Tool to Data Needs & Audience
2. Design as a Collective
3. Build Internal Culture for Dashboard Review
4. Leverage Community Learning

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Thank you!

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