# Optimizing Your Apricot

How to build and maintain an effective database

We will start shortly!

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# Meet Your Trainer

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# Learning Objective

This training will cover:
- Structuring your data around agency outcomes
- Change Management processes
- Governance of your system


- By the end of this session, the goal is for you to understand the importance of structuring your data to support your outcomes, enabling your staff to succeed in system adoption and developing a plan to manage Apricot long term.

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# Agenda

Importance of Outcomes

Change Management

Apricot Governance

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# The Importance of Outcomes

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# WHAT IS AN OUTCOME?

An outcome is the direct, measurable change that is the result of an action or a service.

Your agency outcomes may be to:
- Enhance skills and employability through vocational training programs
- Reduce the incidence of a specific disease through prevention programs
- Reduce homelessness through housing assistance programs

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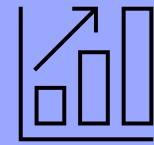# What are the benefits of collecting data?

**Proving Impact**

Data-driven outcomes demonstrate the value of your work by showcasing success stories and social impact.
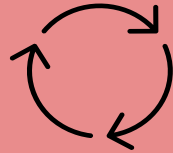
**Program Monitoring**

Data monitoring empowers you to make data-informed decisions for program improvement.

**Program Evaluation**

Key data points track participant progress and assess the impact of interventions.

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# How do you measure outcomes?

The key is data collection and planning.

## Assessments

### Evaluate progress towards goals

Assessments are data collection tools that are used to measure or assess a person or population at a point in time. Assessments should be used at multiple points in time to show change over time. Common assessments are baseline and endline.

## Surveys

### Participant perspective of progress

Surveys are data collection instruments that are used to collect data from a population of people and can be given multiple times. Surveys usually involve collecting data about the participant's perspective, views and experience.

## Indicators

### Provides a measure of a concept

An indicator is something that points to or measures a specific concept or outcome. For example, kindergarten readiness is an outcome that could be measured through multiple indicators: reading comprehension scores, emotional independence, etc.

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# Change Management

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# WHAT IS CHANGE MANAGEMENT?

Change management is the application of a structured process and set of tools for leading the people side of change to achieve a desired outcome.

Ultimately, change management focuses on how to help people engage, adopt and use a change in their day-to-day work.

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# Why is it important?

Managing the implementation of a new software or introducing changes to existing processes within your software may be met with resistance...

| We don't need to change. | Too many things are changing. | The original way is easier. |

*However,* if administrators plan ahead and develop an effective change management strategy, you can ensure **increased user adoption** and **improved data accuracy** and ultimately see a successful facilitation of change!

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# Change Management Framework

**Communicate**
- Understand your audience
- Explain the need for change & benefits
- Share transparent updates about progress

**Build a Team**
- Identify key stakeholders
- Involve people impacted
- Find Champions of Change

**Define Your Strategy**
- Desired outcomes
- Measures of success

**Plan for Resistance**
- Make it easy for people to change / remove blockers
- Understand sources of hesitance / concern

**Ensure Continuous Improvement**
- Pay attention to what's working / not working
- Be flexible and evolve as needs change

Purpose     People     Plan     Implementation     Communication

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# Apricot Governance

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# WHAT IS GOVERNANCE?

Governance is simply the management of the responsibilities of the decisions that must be made around the use of software.

THINK:
- What needs to be done?
- Who decides what?
- When do things need to be done?

Start with small tasks and build from there using a RACI matrix.

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## RACI MATRIX FOR OUR ORGANIZATION

| | | |
|---|---|---|
| R | Responsible |
| A | Accountable |
| C | Consulted |
| I | Informed |

| Deliverable | Timing | Manager, Volunteers | Programs Manager | IT Manager | Executive Director | Admin | Fundraising Manager |
|---|---|---|---|---|---|---|---|
| Manage the Bonterra Contract | Annually | I | I | C | A | R | I |
| Software updates | Upon Release | I | I | A | I | R | I |
| Report for Funders | Annually | I | I | C | C | R | A |
| Set up Programs | Review Quarterly | I | R | C | I | A | I |
| Train Users | Monthly | C | C | I | A | R | R |
| Create Workflows | Annually | C | R | C | A | I | I |
| Update Bonterra on Staff Changes | Review Quarterly | I | R | I | C | I | R |
| Responsible for Communicating with Bonterra CSM | Review Quarterly | C | A | C | R | C | R |
| Responsible for working with ASC | Review Quarterly | C | C | R | C | C | R |
| Responsible for working with Professional Services Team | Review Quarterly | R | I | C | C | R | C |

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# Additional Resources

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# Additional Training Opportunities

- Knowledge Base – How-To Articles (Search Chat or Visit Online)

- Bonterra Academy – Free Webinars & Recordings

- Foundations – Intensive, Multiday Courses to Cover Admin Basics

- Admin Labs – 2 Hour Live Trainings on Specific Capabilities

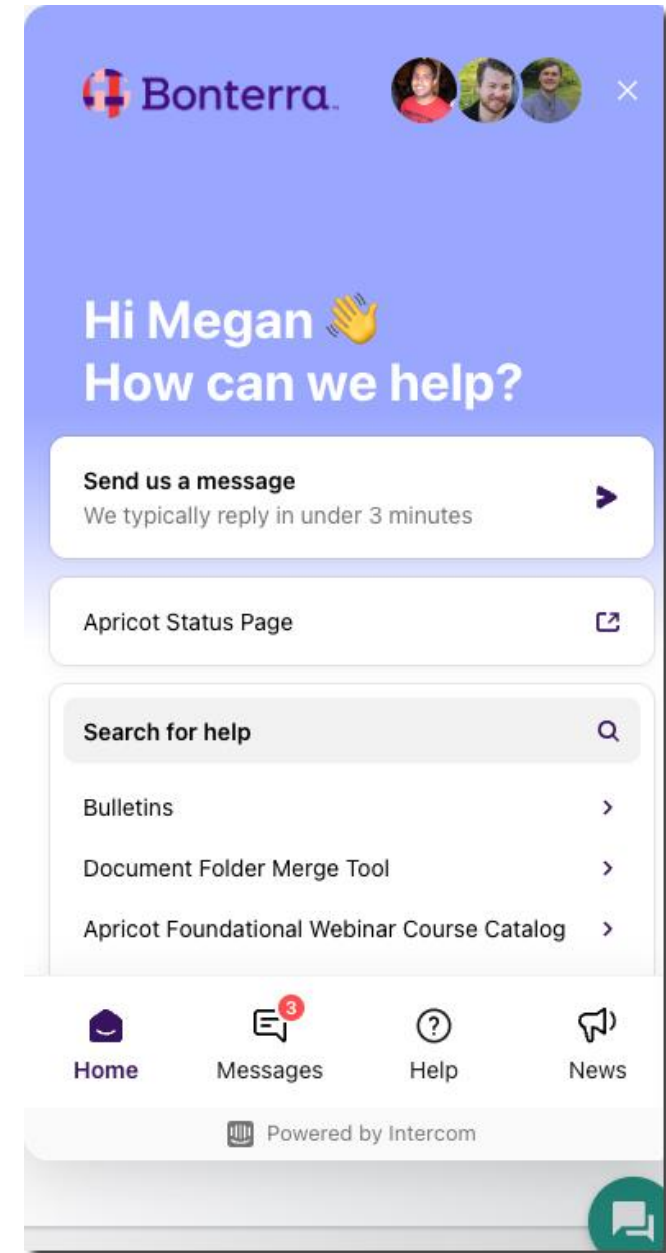- Private Training – 1:1 Sessions with Training Expert in Your Apricot (End User & Admin Topics Available)



Build confidence & knowledge in our software!

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# Customer Support

**Reach out to our Customer Support Team with Questions or Concerns.**

Weekdays 7am – 7pm CST via chat or through email:
apricot@bonterratech.com

# Q & A

- Ask questions about functionality covered in this training

- Ask trainer to redo a demo

- Ask real-life application questions

- Or sign off and we will see you in the next training!



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Thank you for attending!

We hope to see you
in future trainings.

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