

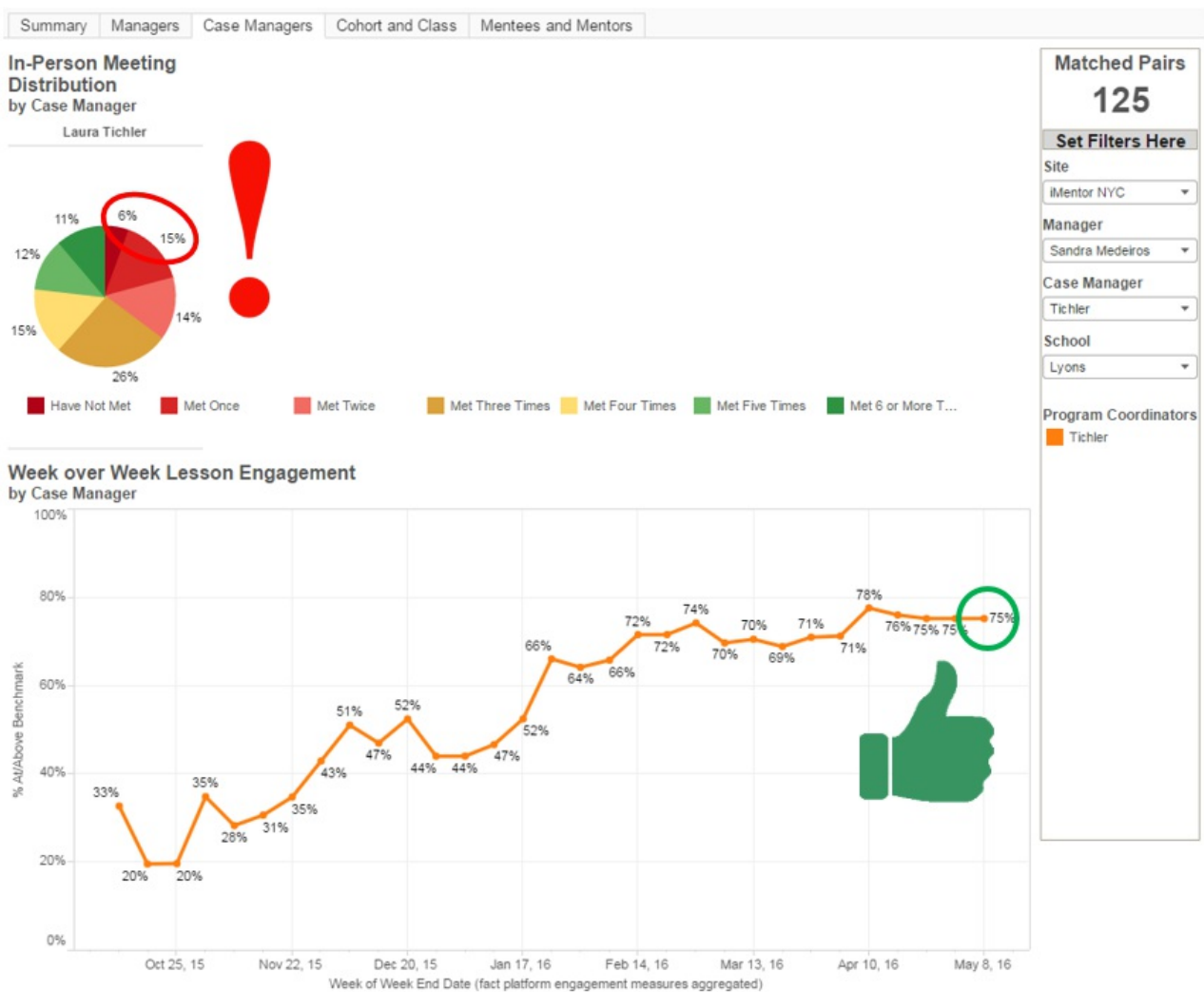
Strategy – Create Quick Focus Lists Using Pair-Level Data

Time is a valuable commodity for staff responsible for supporting pairs. When it comes to determining which pairs need the most support, developing quick and easy ways to create focus lists is an essential skill. Doing so ensures that the support efforts spent are well directed and have the potential for high impact.

In this article, we will explore the use of the View Data function in Tableau to generate a list of pairs to target for attending a make-up event.

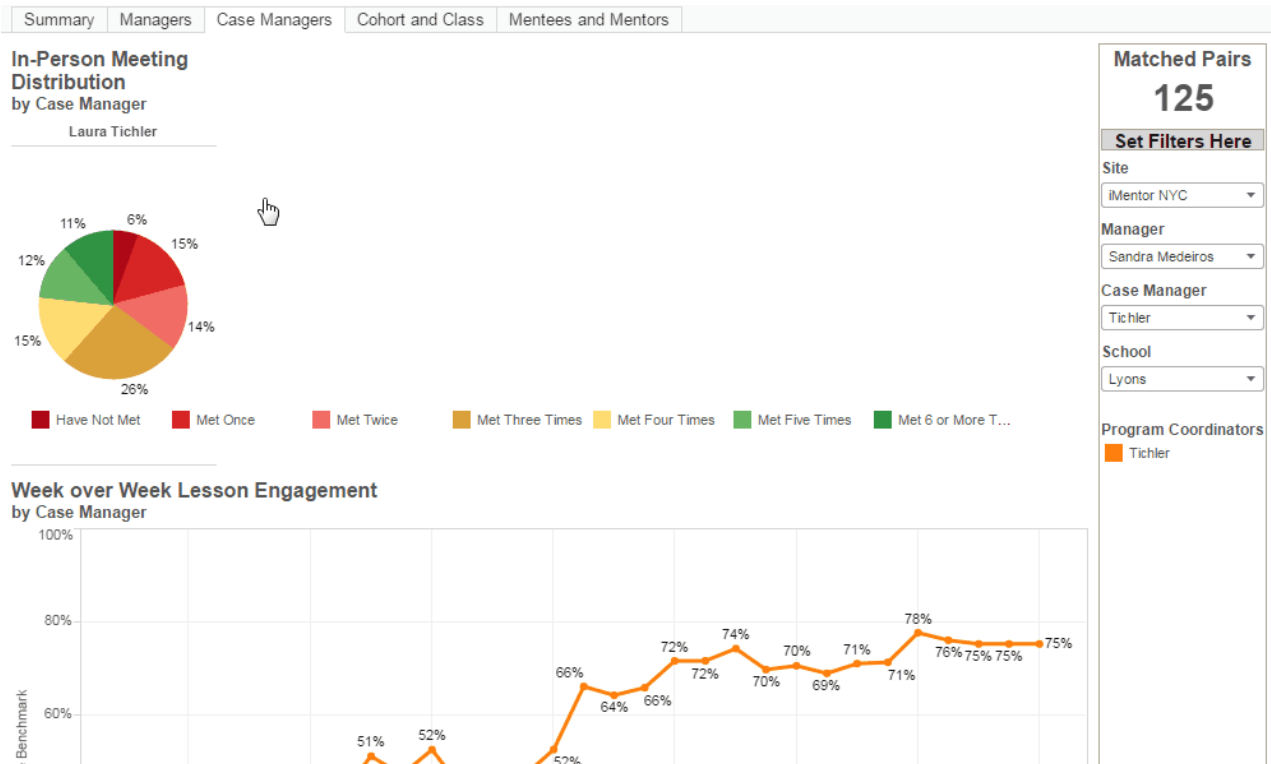
Quick Focus List Creation

Below, the Case Managers dashboard is filtered to an individual with 125 pairs on their caseload. As the end of the year approaches, it appears that her pairs are engaged at a pretty healthy level, but 21% of pairs have not met or only met once.



All pairs are invited to a make-up event at the school, but over the course of the next week, this case manager wants to personally reach out to the mentees and mentors that haven't met or

have only met once. The View Data function is a quick way to create a list of pairs in this category.



After holding down the Ctrl key and clicking on both sections of the pie chart she is interested in and then selecting View Data, the case manager can then click on Underlying Data in the resulting window and download the list of pairs in this category.

View Data - Google Chrome

https://tableau.imentor.org/vizql/w/ProgramEngagement/v/Managers/viewData/sessions/14711BEDD0FD4660

Summary Underlying

Showing first 2 rows.
[Download all rows as a text file](#)

Program Coordinator	Total_In-Person_Mtg (group) 1	SUM(Number of Records)
Laura Tichler	Have Not Met	5.6%
Laura Tichler	Met Once	15.2%

Showing first 2 rows.
[Download all rows as a text file](#)

After opening the downloaded file, the case manager has a nice list of 26 mentees to speak with while in the school that week, and send a bcc email strongly encouraging the mentors to RSVP "yes" to the make-up event.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S	T	U	V	W	X	Y	
1	Class	Cohort	Total_In-F	Program C	Member /	Member /	Member S	Mentee F	Mentee L	Mentee U	Mentor F	Mentor L	Number o	Pair Curric	Pair ID	Pair Other	Partner S	School Na	Updated C	Week End	YTD	Lesson	Mentee C	Mentor C	Pair Completion %
2	Class 1	Lyons 19	Met Once	Laura Tich	Laura	Tichler	iMentor N	Nevelyn	cervantes	178691	Sarah	Goff	1	1	29228		Lyons 19	Lyons	#####	#####	9	56	78	56	
3	Class 1	Lyons 19	Met Once	Laura Tich	Laura	Tichler	iMentor N	Lahquan	mckenzie	178698	Stephan	Richardso	1	1	28951		Lyons 19	Lyons	#####	#####	14	86	71	71	
4	Class 1	Lyons 19	Met Once	Laura Tich	Laura	Tichler	iMentor N	Dellon	Ross	179214	Nick	Mcintyre	1	1	29424		Lyons 19	Lyons	#####	#####	5	100	80	80	
5	Class 2	Lyons 19	Met Once	Laura Tich	Laura	Tichler	iMentor N	prince	davis	179332	John	Warren	1	1	28776		Lyons 19	Lyons	#####	#####	15	87	87	80	
6	Class 2	Lyons 19	Met Once	Laura Tich	Laura	Tichler	iMentor N	samuel	grajales	179335	Marc	Weisi	1	1	28777		Lyons 19	Lyons	#####	#####	15	67	87	67	
7	Class 1	Lyons 19	Met Once	Laura Tich	Laura	Tichler	iMentor N	Nicholas	Rodriguez	179828	Felton	Cortijo	1	1	28928		Lyons 19	Lyons	#####	#####	15	53	40	33	
8	Class 1	Lyons 19	Met Once	Laura Tich	Laura	Tichler	iMentor N	norbey	martinez	179966	Ashley	Bonett	1	1	29271		Lyons 19	Lyons	#####	#####	9	100	100	100	
9	Class 3	Lyons 19	Have Not	Laura Tich	Laura	Tichler	iMentor N	cindy	sanchez	180112	Lucy	Kovalenko	1		28805		Lyons 19	Lyons	#####	#####	13	54	77	46	
10	Class 3	Lyons 18	Met Once	Laura Tich	Laura	Tichler	iMentor N	china	malave	181131	Metty	Fisseha	1	1	29176		Lyons 18	Lyons	#####	#####	8	75	50	50	
11	Class 1	Lyons 19	Met Once	Laura Tich	Laura	Tichler	iMentor N	junior	vargas	179977	Jim	Ling	1	1	29154		Lyons 19	Lyons	#####	#####	11	73	73	55	
12	Class 2	Lyons 19	Met Once	Laura Tich	Laura	Tichler	iMentor N	altagracia	roque	180395	Carl	Collette	1		29236	1	Lyons 19	Lyons	#####	#####	10	80	80	80	
13	Class 1	Lyons 18	Have Not	Laura Tich	Laura	Tichler	iMentor N	antonazia	greene	165819	Armenan	Kouadio	1		23723		Lyons 18	Lyons	#####	#####	22	27	55	27	
14	Class 1	Lyons 18	Met Once	Laura Tich	Laura	Tichler	iMentor N	cassey	acevedo	166436	Paige	Smith	1	1	25470		Lyons 18	Lyons	#####	#####	21	81	95	81	
15	Class 2	Lyons 18	Met Once	Laura Tich	Laura	Tichler	iMentor N	loreny	piena	166559	Deborah	Caesar	1	1	24758		Lyons 18	Lyons	#####	#####	20	60	100	60	
16	Class 2	Lyons 18	Have Not	Laura Tich	Laura	Tichler	iMentor N	naya	brown	166566	Lafarah	Frazier	1		24666		Lyons 18	Lyons	#####	#####	20	65	85	65	
17	Class 2	Lyons 18	Have Not	Laura Tich	Laura	Tichler	iMentor N	taji	lippermar	166570	Brandon	Wood	1		24729		Lyons 18	Lyons	#####	#####	20	70	70	55	
18	Class 3	Lyons 18	Met Once	Laura Tich	Laura	Tichler	iMentor N	jeremiah	bishundia	166574	Rajaram	Balasubra	1		24753	1	Lyons 18	Lyons	#####	#####	19	74	63	63	
19	Class 2	Lyons 18	Met Once	Laura Tich	Laura	Tichler	iMentor N	zoey	codrington	166759	Tiffany	Poole	1	1	24636		Lyons 18	Lyons	#####	#####	20	90	85	80	
20	Class 1	Lyons 18	Met Once	Laura Tich	Laura	Tichler	iMentor N	deona	rosario	166774	Elliana	Jin	1	1	24706		Lyons 18	Lyons	#####	#####	22	27	50	27	
21	Class 1	Lyons 18	Met Once	Laura Tich	Laura	Tichler	iMentor N	lymie	chambers	166834	Rajesh	Jegadees	1		24740	1	Lyons 18	Lyons	#####	#####	21	76	76	67	
22	Class 2	Lyons 18	Met Once	Laura Tich	Laura	Tichler	iMentor N	alyssa	morales	166862	Liz	Vargas	1		24658	1	Lyons 18	Lyons	#####	#####	20	75	80	70	
23	Class 3	Lyons 18	Have Not	Laura Tich	Laura	Tichler	iMentor N	bryan	toledo	166868	Roman	Shapiro	1		24757		Lyons 18	Lyons	#####	#####	19	74	74	63	
24	Class 1	Lyons 18	Met Once	Laura Tich	Laura	Tichler	iMentor N	josue	flores	166556	Jordan	Schatz	1		29427	1	Lyons 18	Lyons	#####	#####	6	100	83	83	
25	Class 2	Lyons 18	Met Once	Laura Tich	Laura	Tichler	iMentor N	jose	reyes	166898	Aaron	Lanou	1		25602	1	Lyons 18	Lyons	#####	#####	20	65	95	60	
26	Class 1	Lyons 18	Have Not	Laura Tich	Laura	Tichler	iMentor N	jony	slavik	168138	Kevin	Nesbeth	1		29426		Lyons 18	Lyons	#####	#####	5	40	60	40	
27	Class 3	Lyons 18	Have Not	Laura Tich	Laura	Tichler	iMentor N	tajh	jones	168144	Doug	Oldiges	1		25473		Lyons 18	Lyons	#####	#####	19	47	53	42	

It may even be wise to comb through the columns on the right-hand side of the download (online lesson completion frequencies) to identify mentors that are also less engaged when it comes to online communication. Perhaps those mentors also receive a personal phone call to illustrate the importance, not only of attending this make-up event, but also increasing their online engagement in service of strengthening their relationship.

The View Data function works everywhere in Tableau, so in-person meetings are simply one way to identify a manageable list of pairs to focus on.

Feel free to reach out to re@iMentor.org (mailto:re@iMentor.org?subject=Assistance%20with%20Data%20Driven%20Strategies) with any questions or requests for support in leveraging this strategy in your work!

Have you tried this strategy or deployed a similar effort? If so, please consider leaving a comment below outlining your experience!