Community Engagement Data Methodology Guide

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Overview

At your fingertips is now a central repository for tracking all data related to your Firm's impact and community outreach efforts. This data can be referenced on its own, or easily viewed and edited in a more visually pleasing format through the Siebert Community Engagement Power BI Dashboard. **While the data inputs themselves are sourced from various stakeholders, it is our recommendation that any modifications to the primary consolidated data file are controlled by one person to minimize any errors**. The following guide serves as a reference for adding and maintaining data on a go-forward basis. It is organized according to the tabs within the data file provided at the conclusion of the consulting engagement.

I.　　Company Donations

Data Source: Sharon Spencer

Modifications made to the provided raw data	• Removed all line items related to "Promotions", which Sharon clarified were not considered Donations • Added an "OrgFocus" column to categorize the type of community organization, based on a quick Google search for the organization's website and mission
Things to watch out for during data cleaning	• Consistency of Donation Date format (MM/DD/YY) • Spacing of the Requested by Names should be consistent: the format should be "X. XXXXX" or in other words, first initial, period, followed by a single space and the full last name. Any errant space or letter prevents proper consolidation for donations requested by the same person and would result in incorrect totals for that employee • Naming convention for Organizations: naming should be consistent. There were many instances where the same organization was shortened in one place, lengthened in another. We recommend first searching the organization in the existing table to see if it exists and then if it does, matching the spelling exactly by copying and pasting the name of the organization Also, for nationwide organizations that have regional chapters, make sure to standardize the organization name so it consolidates under the same umbrella organization.

	The regional aspect can simply be reflected in the location columns for City & State. So, for example, "Women in Public Finance DC" turns into just "Women in Public Finance" and the City & State columns say "Washington" and "D.C." Please again note that any errant space or letter prevents proper consolidation and would result in incorrect totals for that organization
	• City spelling should be consistent: be careful to fully spell out all city names and ensure they are spelled correctly
	• Each line item and cell must represent one single attribute: Any donations that are split between people need to either be allocated to one person, or the donation value needs to be split evenly, with each person receiving their own line item. The same for donations split between locations. Each cell must have its own data

I.   SWS Foundation Donations

Data Source: Sobani Warner

Modifications made to the provided raw data	• Aligned naming convention for Organization Names & Organization Category to the Community Donations tab for consistency
Things to watch out for during data cleaning	• Please reference the same data cleaning items listed under "Company Donations" as detailed above

II.   Internships

Data Source: Sharon Spencer

Modifications made to the provided raw data	• Added a date for the year the students were supported. Arbitrarily used January 1 of each year for consistency's sake