

# DATA-DRIVEN DECISION-MAKING FOR REAL ESTATE PLANNING

AUREO WORKSHOP 2014

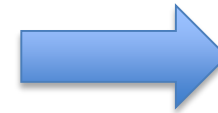


Rena Cheskis-Gold, Principal  
Demographic Perspectives, LLC  
[www.demographicperspectives.com](http://www.demographicperspectives.com)

# INTRODUCTIONS

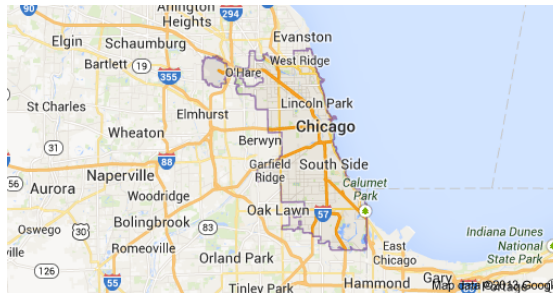


# HOW DID I GET TO BE A DEMOGRAPHER?

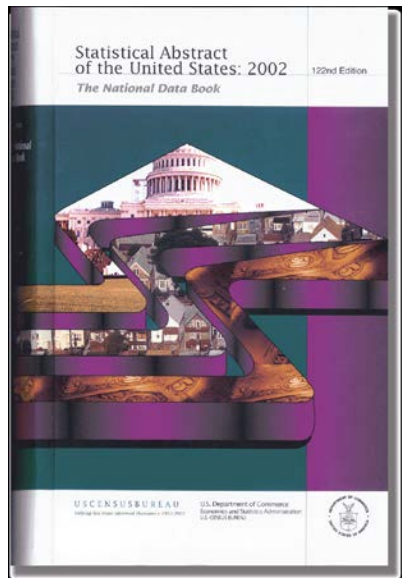


**MATH  
TEACHER???**

*crazy love*



**LOCAL HERO** 



**U.S. Census**

# PASSIONATE ABOUT SUPPORTING STRATEGIES WITH DATA



Live with friends or near friends	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Lower cost than on-campus housing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Good value for cost compared to on-campus apartment options	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Desire to not have campus meal plan	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Unit amenities (e.g., d/w, a/c, carpeting, spacious room size)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Building amenities (e.g., common rooms, storage, parking, backyard or patio)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality and attractiveness of housing	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Good maintenance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
More independence, "real world"	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Religious or personal needs (e.g., candles, special foods, allergies)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Physical accessibility	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Other important reasons for choosing off-campus housing:

Please specify your room type.

- ☐ Single  
☐ Double  
☐ Triple

Where do the funds come from to pay for your current housing costs? (Please mark all that apply.)

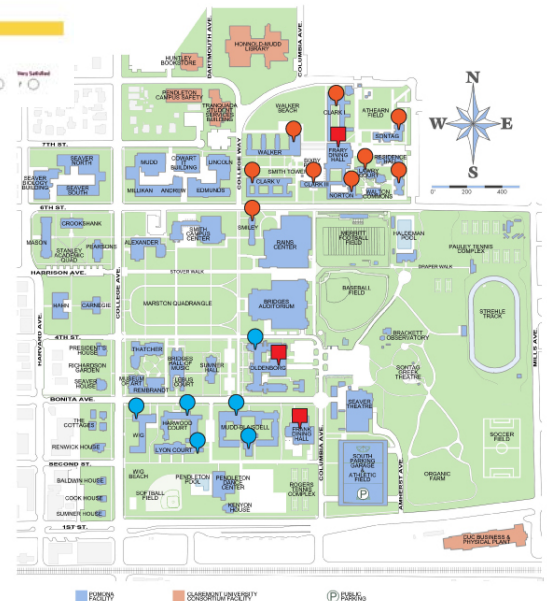
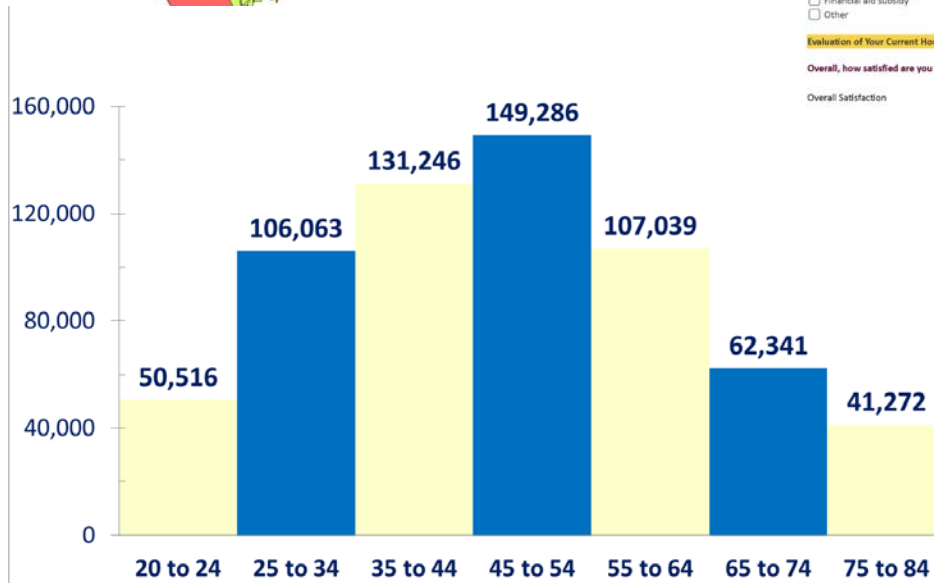
- ☐ Your earnings or savings  
☐ Your parents or relatives  
☐ Financial aid subsidy  
☐ Other

## Evaluation of Your Current Housing Situation

Overall, how satisfied are you with your housing situation this year?

Overall Satisfaction

- ☐ Not at all satisfied  
☐  
☐  
☐ Very satisfied



# WORKSHOP AGENDA

- Quick overview of 12 planning steps
- Drill down on the project brief
- Individual work time on project brief
- Small group share time
- Full group share time
- Staffing options
- Discussion and questions



# DATA-DRIVEN DECISION-MAKING: EXAMPLES

- Develop an off-campus undergraduate housing strategy
- Support recruitment and retention
- Manage off-campus housing
- Attract good retail partners





# 12 BASIC PLANNING STEPS





# DEFINE & ALIGN

## Step 1: Articulate Problem

- Underlying vs. Immediate
- Influence vs. Accept
- Challenges and Opportunities
- Internal vs. External







# DEFINE & ALIGN

## Step 2: Clarify Mission and Goals

- Definitions
- Examples





# CLARIFY PROCESS

## Project Brief

- Consolidate thinking on one-page
- Practical, not theoretical





# DATA TOOLS

## Quantitative Data and Analysis

- Surveys
- Demographic data analysis
- Institutional data analysis
- Benchmarking
- Modeling
- Mapping
- Social media themes

## Qualitative Data and Analysis

- Focus groups
- Interviews
- Participant observation
- Document analysis  
(planning studies, reports, surveys)



# DATA STEPS

## Step 3: Stakeholder Input

- Surveys
- Focus Groups
- Interviews





# DATA STEPS

## Step 4: Existing Data

- Resident/customer lists
- Building program inventory
- Demographic data
- Growth projections
- Hidden gems in other campus studies
- Market analysis
- “Little data”





# DATA STEPS

## Step 5: Benchmark and Best Practices

- Quantitative
- Qualitative

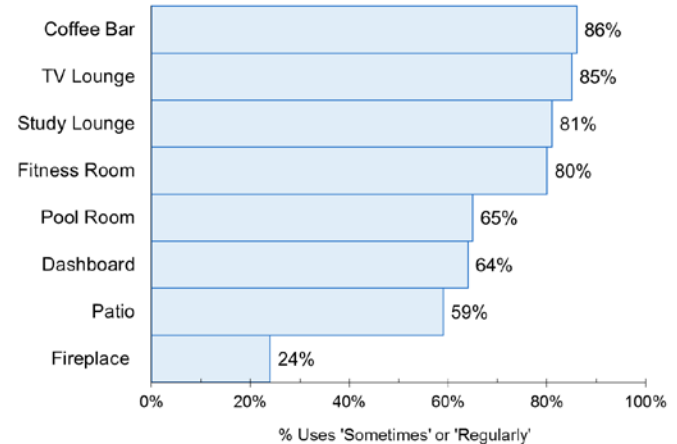




# PEER BENCHMARKING

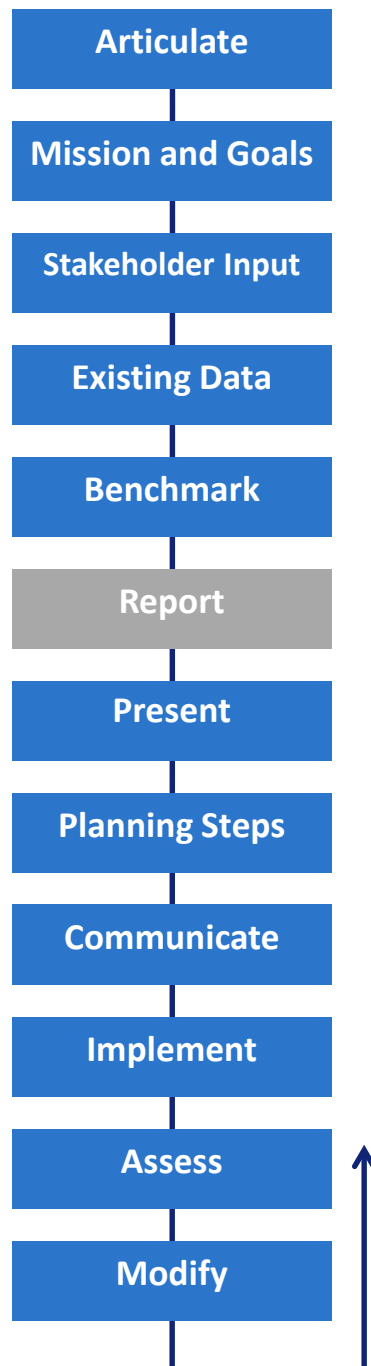
- Comparisons with admissions peers, system peers, structural peers, consortial peers, aspirational peers
- Best practices and hot topics

Utilization of Student Center Features



## Res Life Unit Mix

	Traditional Res Halls	Suites	Apts.	Small Houses
Your School	X	X		
School A	X	X	X	
School B	X	X	X	X
School C	X	X	X	X



# REPORT AND PRESENT

## Step 6: Report

- Analysis: Simple vs. Complex
- Integrate
- Strategy





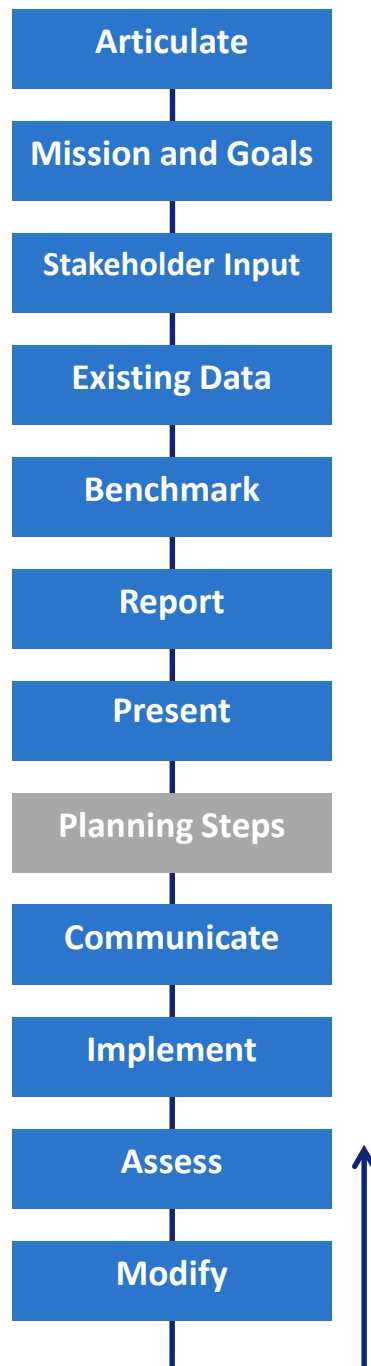


# REPORT AND PRESENT

## Step 7: Present

- Style
- Audiences
- Feedback





# OUTCOMES

## Step 8: Planning Steps

- Incorporate feedback
- List of strategies
- Prioritize strategies
- Refine project brief





# OUTCOMES

## Step 9: Communicate

- Who needs to know/ transparency
- Community building
- Marketing moment
- Delivery method





# OUTCOMES

## Step 10: Implement

- Begin core strategy!





# ASSESSMENT

## Step 11: Assessment

- Match to goals
- Measurement of achievement
- Areas of unexpected achievement
- Tools





# ASSESSMENT

## Step 12: Modify

- Develop strategies and prioritize
- Set up to succeed



# IMPORTANT CONSIDERATIONS

- What tools do I need to get organized?
- How do I staff this project?



# 8-Step Project Brief

Background

Goals

Population

Message

Deliverables

Timeline

Budget

Staff





# 8-Step Project Brief

## Background

What was the catalyst for the project? Why Now? Opportunities? Challenges?

---

## Goals

What is to be accomplished? What is the methodology to be utilized?

---

## Population

Who is the project about, and for? Is there a priority population for the plan?

---

## Message

In the end, if you had 5 minutes to present to the Executive Director or Board Chair, what would that slide say?

---

## Deliverables

What is needed to get your message across to your audience, e.g., a full report, just charts with text, illustrations, statistics/quotes, just bullet-pointed slides?

---

## Timeline

Is there an end date for the project that is tied to a calendar date? Seasonal? If this is a repeating process, is there a specific season to target, or to avoid?

---

## Budget

What is the proposed budget? Where will the money come from? How much room is there for budget overrun?

---

## Staff

Which internal constituents/offices need to be represented in the process? Will this process be done in-house, with consultants, or a hybrid?

---



# PROJECT MANAGEMENT

## Project Participants

**University Staff:** (Oak City U)

## Demographic Perspectives Staff

*Rena Cheskis-Gold*, Principal Survey Consultant, Demographic Perspectives (RCG)

*Alex Danahy*, Survey Consultant, Demographic Perspectives (AD)

*Michael Ben-Avie*, Web Consultant, Demographic Perspectives (MBA)

## Other Consultants Staff

Vineyard Architects (VA)

Project Task	Project Team
<b>1. Survey Design</b>	
Determine issues to address and prioritize, population to survey	Univ., Demographic Perspectives (DP); VA
Survey Drafts	DP, Univ., VA
IRB Survey Approval	Univ., DP.
Final Survey Instrument	DP, Univ.
Survey Web Design	DP

Survey Calendar	
10/14 (Day 1)	Survey Launch (11 a.m.)
10/16 * (Day 3)	First reminder (5 p.m.)
10/20 * (Day 7)	Second reminder
10/23 * (Day 10)	Third reminder
10/27 * (Day 14)	Survey Close



## Comparison of Staffing Options to Lead a Data-Driven Decision-Making Process

Staffing	Opportunities	Challenges
A. Train in-house staff	<p>Professional development oppty for staff member</p> <p>Option 1. Do self-training via Internet</p> <p>Option 2. Take local workshop on how to collect, organize, and analyze data, e.g., Excel Pivot tables</p> <p>Option 3. Work with consultant (see option B)</p>	<p>Need designated time to devote, and relief from other work obligations</p> <p>Who will supervise staff member in new duties?</p> <p>If continual office goal, must be sustainable</p> <p>Learning how to collect data is easier than learning how to analyze data</p>
B. Hire consultant to set up process and train in-house staff	<p>Could be modest cost</p> <p>Can be combined with option A</p>	<p>Tradeoff of cost vs. custom solution:</p> <p style="padding-left: 40px;">Lower cost --&gt; boilerplate solution</p> <p style="padding-left: 40px;">Higher cost --&gt; custom solution</p> <p>Must have appropriate in-house staff</p>
C. Hire staff member with experience	<p>Bring in real focus and expertise</p> <p>Demonstrates long-term commitment to data-driven decision-making</p>	<p>Salary and equipment costs, office space</p> <p>Is there enough work to fill a full-time or part-time position?</p>
D. Hire consultant on retainer to fully manage a single process, or multiple processes	<p>Good consultant quickly learns organizational culture</p> <p>Brings full process, from collection, to analysis, to communication, to strategies for implementation</p> <p>Provides client with a solution for current project, but can also develop a process for future projects</p>	<p>Finding and selecting appropriate consultant</p> <p>Need designated in-house staff to work with consultant</p> <p>Highest cost</p>

# Survey Planning Brief: Determine staff and deadline for each task

## Timeline

Set dates for planning period, live survey time, reporting, presentations

---

## Population dataset

Gather emails and background information on people to be surveyed

---

## Content

Develop topics, narrow down to questions, then only actionable questions. Organize to help respondent move smoothly through survey.

---

## Collateral

Collect any images or photos you may want to include to test-market new ideas.

---

## 'Look' and Design

Utilize the same colors and fonts that already are used to represent your program.

---

## Communications

Web, paper, or phone surveys all need cover letters signed by well-known and important stakeholders. Develop letter content, and signature approvals.

---

## Administration

Need administrator to send multiple waves: initial contact, plus 2-3 follow-ups. Also need a tech support contact.

---

## Analysis & reporting

Timeline, deliverables, style of report (text, charts, full data appendices). Determine level of transparency and sharing, groups for presentations.

---



# DISCUSSION AND QUESTIONS



FOR MORE INFORMATION:

## Demographic Perspectives, LLC

334 McKinley Avenue, New Haven, Connecticut 06515

[www.demographicperspectives.com](http://www.demographicperspectives.com)



**Rena Cheskis-Gold, Principal**

[rena@demographicperspectives.com](mailto:rena@demographicperspectives.com)

Ph/fax (203) 397.1612



Demographic Perspectives, LLC  
[www.demographicperspectives.com](http://www.demographicperspectives.com)

Providing data and analysis for strategy, communications,  
assessment, and for managing change.

© Copyright 2014