



LEO WARDRUP MEMORIAL CAPE CHARLES CUP



Management and Reporting Team

For the LWM Cape Charles Cup, we collect and process two primary types of data: registrations, which includes regalia orders, and sponsorship data.

Registrations

In preparation for the LWM Cape Charles Cup, we collect registration details from skippers via the BBSA website. As we collect the registrations, we need to process the information in several ways, including the creation of:

- Registration lists of boats, skippers, and boat specifics for the yearbook and website,
- Racing class lists including the Scratch Sheet,
- Revenue tracking based on registration fees and purchases,
- Shirt order reports with quantities and sizes so we can submit the order and stuff the skippers' bags accurately,
- Reports to track competitor boat photos for the yearbook,
- And several other reports based on registration data.

Sponsorships

Also, we rely on sponsors to help cover the cost of LWMCCC. For their support, we offer ad space in our yearbook as well as on our website. We maintain a comprehensive sponsor database that keeps track of sponsorships each year, so we can manage:

- Contact information and company details,
- Who has been contacted,
- What has been committed,
- What has been received,
- What level of sponsorship and type of ad they have earned,
- Whether we have received the ad,
- Thank you letters to all sponsors with the correct contact information,
- Details about our sponsorship revenue.

Multiple Volunteer Options

Both data management responsibilities are currently handled completely by the same person, but they do not need to be. Registration data and sponsorship data are separate. The sections below describe each function in more detail. Potential volunteers can do both or either.

General Thoughts about Software Choices

The software that is chosen to process these data and reports should be commonly available. Eric Brinsfield's initial system was built using software that is not commonly available but for which he was an expert. He chose it for expediency his first year. The next years he searched for the best software solutions that were:

- commonly available,
- reasonably priced or free,
- viable by many,
- and could be transferred to other volunteers in the future.

When a new data manager or reporter takes responsibility for these tasks, he or she may convert the processing to other software but should still plan on future portability to others.

The processes described below are currently functional and will continue to function with minor edits each year. Eric will be happy to train anyone who wants to assume the responsibilities for this processing in the future, but a basic knowledge and experience with either data management or reporting would be important.

Registration Data Management and Reporting

Data Management

We collect race registrations and updates to regalia orders through our website software called WildApricot, which is owned by Personify. Although WildApricot can produce reports, the reports do not meet our needs. Consequently, we must regularly export registration data from WildApricot into Excel. Data needs to be rearranged, cleaned, and augmented before we can use it.

The methods presented here describe just one way all of this could be achieved. Any volunteer that wants to take over this responsibility can transform the data however they feel most comfortable. View the following description as just a way to explain the desired end results.

Currently, we use Microsoft Power Query to import and transform the registration data. Again Power Query is not required, it is just what we have currently chosen. Data transformations include:

- Removing unneeded columns from the WildApricot export,
- Cleaning and standardizing column values and names,
- Creating separate tables for skipper registrations and skipper orders for shirts, bags, hats, and dinner tickets and merging order updates with original registrations,
- Transposing (flipping) columns into single columns with multiple rows,
- Generating counts for free regalia and tickets (items included with registration),
- Tracking which skippers have submitted boat photos or whether to use last year's photo.

Reporting

Registration reports include the following:

- Class Summary – counts of boats per racing class,
- Boat Report – all boat registrations sorted by boat name with a specific set of columns,
- Class Report – all boat registrations sorted by class with a specific set of columns,
- Skipper Report - all boat registrations sorted by skipper last name with a specific set of columns,
- Min Draft Report - all boat registrations sorted by draft with a specific set of columns,
- Marina Reports - all boat registrations for each marina at Cape Charles,
- Courtesy Report - all boat registrations requesting courtesy ratings sorted by skipper last name with a specific set of columns,
- First Year Report - all boat registrations for first year skippers sorted by skipper last name with a specific set of columns,
- Unpaid - all boat unpaid registrations,
- Photo Status - all boat registrations sorted by boat name with photo-related columns,
- Yearbook Stats – all boat registrations sorted by boat name using only columns used in the yearbook and online boat listing with photos. This is used to generate HTML for the website,
- Registration Annual Comparison Graph – graph each year’s registrations over time.

Regalia reports include the following:

- Order Summary – Summary counts of shirts, bags, hats, and tickets by size in a pivot table with slicers for Registration Type and Boat Name,
- Inventory Alerts – List of orders of regalia types and sizes compared to inventory,
- Extra Dinner Tickets – special report on extra dinner ticket orders,
- Inventory Report – listing regalia types and sizes comparing starting inventory to pre-orders and various inventory counts after specific events, such as bag stuffing, skippers’ meeting, Saturday social, and awards social,
- Produce Size Analysis – multiple pivot tables analyzing product sales vs. order costs,
- Bag List – used to create bag list tags that itemize contents of each skippers’ bag. Placed in skipper’s bag during bag stuffing.
- Class Boat Analysis – order analysis per class and boat.

Generally, these only need to be refreshed about every week until we get to the last month before the race. At that point, data and reports are refreshed daily or as new registrations arrive.

Volunteer Positions

For registrations, one person can handle everything, or the job could be broken into any combination of three pieces:

1. Website event and data collection specialist
2. Data management specialist – using tool of choice. Currently Excel Power Query
3. Data reporting specialist - using tool of choice. Currently Excel Power Query, basic pivot tables, and Power Pivot tables

Sponsorship Data Management and Reporting

Data Management

All sponsor data is entered and managed by the LWMCCC Committee and does not include any automated data collection through the website. We do provide an online sponsorship form, but the information from that system is manually updated in the Sponsor database.

Currently, the Sponsor database is stored in Microsoft Access. We have converted from Excel, to SAS, to Excel, to Sharepoint Lists, to SQL Server, and ultimately to MS Access. The goal was to find software that was affordable and provided a user interface for data entry that was easy to use and easy to maintain for volunteers in the future. Excel works fine but with the number of columns we track, the user interface was unfriendly.

So, we settled on MS Access with a set of relational tables, queries, and forms. The database structure is not very complicated, so only a basic level of MS Access knowledge is required. Each row in the table is unique to a sponsor and year.

Reporting

Rather than writing all reports in MS Access, the current system extracts data from MS Access into Excel using Power Query.

Reports include:

- Overall Status – list of all sponsors sorted by organization name and last name with a subset of columns that help to monitor the status of sponsorship contributions.
- Sponsors by Owner – committee members are responsible for specific sponsors, so this report is sorted by the committee members.
- Outstanding Commitments – List of sponsors who have made commitments that have not been received.
- Ad Status Report – list of sponsors showing what type and size ad they have earned and the status of that ad (received and ready)
- InKind Status – status of all inkind sponsorships
- Auction Raffle report – listing of sponsors providing items for auction or raffle
- Multiple reports on sponsors with no status update from committee members
- Banner List – auto-generated list of sponsors used as input to yearbook and printed banners
- Mailing Lists – over the year, we send multiple “thank you” notes to sponsors, so we use the database to generate the list with names and addresses. We also generate multiple lists for other internal uses.

Note: The Auction/Raffle Manager also maintains a separate spreadsheet of auction details that are used to manage the individual auctions and raffles. The sponsor database is used for status tracking and historical recording. The two data stores are synchronized regularly.

Volunteer Positions

For sponsorship data, one person can handle everything or the job could be broken into any combination of four pieces:

1. Data entry – currently handled by two volunteers.
2. Data management specialist – MS Access specialist if we stick with MS Access
3. Data reporting specialist -using tool of choice. Currently Excel Power Query, basic pivot tables, and Power Pivot tables
4. Auction/Raffle Manager – a separate role not described here.