Affordable Data Solutions: Customizing Off-the-Shelf Software

Eric Rogers
AAO Design Matters Conference 2019
Introductions
Case Study: Open House Chicago

Program management as a data management challenge

- Decisionmaking: buy vs. build
- DIY Database: how to build in Airtable
- Challenges and wins: what’s problematic, what’s possible
GET BEHIND-THE-SCENES ACCESS TO BUILDINGS ALL OVER CHICAGO

350 SITES · 48 HOURS · GO · IT’S FREE

OPENHOUSECHICAGO.ORG | #OHC2019
Open House Chicago Overview

• Annual festival of architecture & urban exploration launched in 2011

• Part of a global network of over 50 similar events

• No tickets or reservations required for the most part; a true citywide choose-your-own-adventure experience

• Visitors use OpenHouseChicago.org and a printed Event Guide to plan their own weekends
Open House Chicago 2019

- 352 sites in 38 neighborhoods
- 109,000 visitors made 370,000 visits
- 62 community partner organizations
- ~2,000 volunteers directly scheduled
### Some Familiar Trends

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Constraints & Challenges

• Doing more with less (people, money)
• Desire to streamline and automate
• Generalist staff with limited expertise
Planning for Change

1. Assessing past systems
2. Setting goals
3. Identifying options
4. Making a decision
5. Implementation
6. Evaluate & refine
1. Assessing past systems

2014: Paper sign-up forms + Google Sheets
   +Simple
   -Labor-intensive, stale or siloed data

2017: Google Forms + Google Sheets
   +Digital first, less manual labor and printing
   -Stale or siloed data

2018: Tessitura + Submittable
   +Digital first, database-driven systems
   -Inflexible, not tailored to operations, siloed data
2. Setting goals

- Unify storage and management workflows of data and content into one easier-to-use system

- Reduce labor-intensive, error-prone manual entry, merging, unmerging, and manipulation of data – while retaining flexibility to change any data as needed

- Allow sites to propose, sign up, review/edit content, and submit needed info and materials
3. Identifying options

• Synthetic research (Capterra)
  • What category to search?
  • Feature comparisons, and frequently-compared
  • Airtable rose to the top for versatility

• Talking with peers
  • Most still on spreadsheets/Google Sheets
  • Formstack forms
  • Custom-built tools for Open House London, Doors Open Pittsburgh
4. Making a decision

• Doors Open Pittsburgh system vs. Airtable
• Buy vs. Build
• But it’s more nuanced than that!
4. Making a decision

Doors Open Pittsburgh system

Pros
• Already exists
• Purpose-built for similar workflows & processes
• Proven track record

Cons
• Vendor/platform lock-in
• Licensing fees in addition to costs for hosting, etc
• Integration with systems we don’t use
• Would require customization – not turnkey
• Might not be flexible for future changes
4. Making a decision

Airtable

**Pros**
- Quick and free to start using
- Affordable subscription fees (less than $12/user/month with NPO discount)
- Many templates available to study and adapt
- Flexible and intuitive – can be used like a spreadsheet
- Integrations with other services available (emailing, forms, etc)
- SaaS: automated backups, reliability assured

**Cons**
- Uncertainty about the platform
- Learning curve
- Need to set up from scratch
4. Making a decision

• If we’re going to have to customize something, we might as well build exactly what we want – on a platform that allows ongoing changes.

• Airtable has the power of a relational database, but you can fall back to using it like a shared spreadsheet if need be.

• With a nonprofit discount and monthly per-user pricing, Airtable is very affordable (less than 1/3 what we spent on Submittable in 2018).
5. Implementation

So you’ve decided to build...

- Create a data flow diagram
- Review documentation
- Get started!
Data Flow Diagram

Inventory existing data

Map out main processes (existing and aspirational)

Produce a diagram
Review Documentation

Airtable has around 100 articles documenting how to start, and all major features and functions

Documentation covers integrations with third-party services and the robust API as well

Identify which features and functions enable what workflows

Key concepts: tables, link fields, views, blocks
Review Documentation

Key concepts:
• Tables
• Link fields
• Views
• Blocks
• Integrations
Get started!

- Import
- Start using and building
- Refine as you go
- Document
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Open House Chicago Site Proposal

Fields marked with an * are required. You will receive a confirmation email when your proposal has been received. CAC staff will follow up after we have reviewed your proposal. Those sites selected to participate will have the opportunity to amend all information provided.

Your Name

Your Email Address
Will only be used to follow up with you about this proposal.

Your Preferred Phone
Will only be used to follow up with you about this proposal.
RH Three Arts Club
1300 N Dearborn Parkway

medina athletic club
505 Michigan Avenue

Our Lady of Mount Carmel
708 W Belmont Ave

Salvage One
1840 W Hubbard St.

The Black Chicago Museum
7424 South Morgan Street

In architectural significance, I served on the Three Arts Club board for many years. It was built in 1919 for housing for women studying the arts in Chicago. It has dome architecture.

Our church was built in 1913 but was established in 1886. We are an anchor in Lakeview. We were featured in the movie "While You Were Sleeping".

Picture an expansive 60,000 sq ft Chicago warehouse complete with stunning exposed brick, timber floors and an interesting...
Find duplicate records

Pick a table and fields to find duplicates. Optionally, choose a view to limit the set of records. You can manually review and merge these records in the next step.

Table
Organizations

View
Grid view

Fields for duplicates
Records are considered duplicates if they have matching cell values in all of these fields.

- Name
- Tessitura ID
- Site Address
- Secondary Name
- Multisite
- Entrance Instructions
- Shortname
- City
- State

38 RECORDS

- Unnamed record
- Unnamed record
- Unnamed record
- Unnamed record
- Unnamed record
Open House Chicago 2019 will take place on October 19-20. It is our pleasure to invite Eris Brewery & Cider House to participate.

In 2018, OHC attendees made 366,000 visits to 278 featured sites. We expect OHC’s impact to continue to grow in 2019.

The deadline to sign up is July 1. However, the sooner you sign up the better. If you are unsure about your participation, simply reply to this email and let us know how we can help you decide.

Next Steps:

1. Review the OHC 2019 Site Participation Information packet.
2. If you’re ready to commit, sign up using the convenient online form (simple new system this year, no log-in required). You can also sign up using the paper form if necessary.
3. The OHC Team will be in touch about next steps.

We’re looking forward to working with you this year. Together, we can make OHC 2019 the best yet!

Open House Chicago Team
Chicago Architecture Center
Formerly Chicago Architecture Foundation
111 E. Wacker Dr., Suite 1321 | Chicago, IL 60601
OHC@architecture.org
architecture.org | openhousechicago.org
OPEN HOUSE CHICAGO 2019 SITE PARTICIPATION PORTAL

This portal for sites participating in OHC 2019 includes a timeline, forms that sites are asked to complete after signing up, and links to resources that may be useful. Do not share this page’s URL or contents outside of your organization.

If you have questions or concerns, email OHC@architecture.org. If possible, please add OHC@architecture.org to your trusted list of senders, contacts or address book to avoid being marked as spam/junk. Important communications will come from this email address.
6. Evaluate & refine

Wins:

• ONE central, up-to-date database from which to share, export, etc.
• Automated templated emails
• Routine workflows to aggregate & update data
• Dashboard tracking
6. Evaluate & refine

Struggles:

• Difficulty hiring outside help

• Need to produce AND UPDATE documentation

• You have to pick and prioritize; you probably can’t realize all your goals at once

• It’s never done, and sometimes you have to build things under pressure
6. Evaluate & refine

Plans:

• Fix and document functions built hastily right before OHC 2019 weekend

• Add status tracker to Portal, so sites know where they are in process without inquiring

• Where record types are similar but not identical, separate into different tables to simplify
Conclusions

1. Technology can make the small, mighty

2. Platforms like Airtable make the DIY creation of complex custom tools possible
Q & A

Eric Rogers
Manager, Open House Chicago & Community Outreach
Chicago Architecture Center

erogers@architecture.org