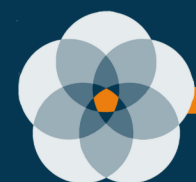
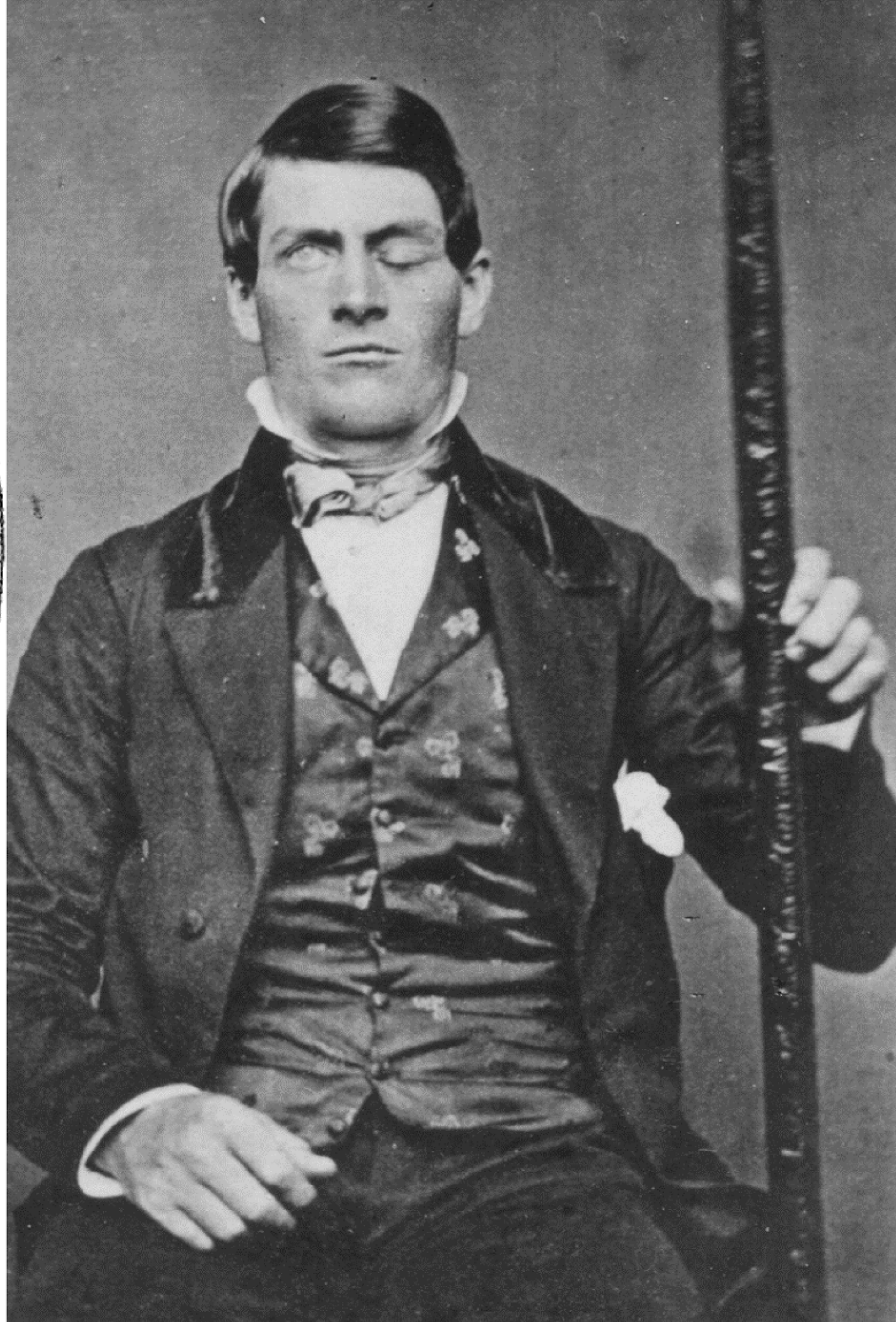
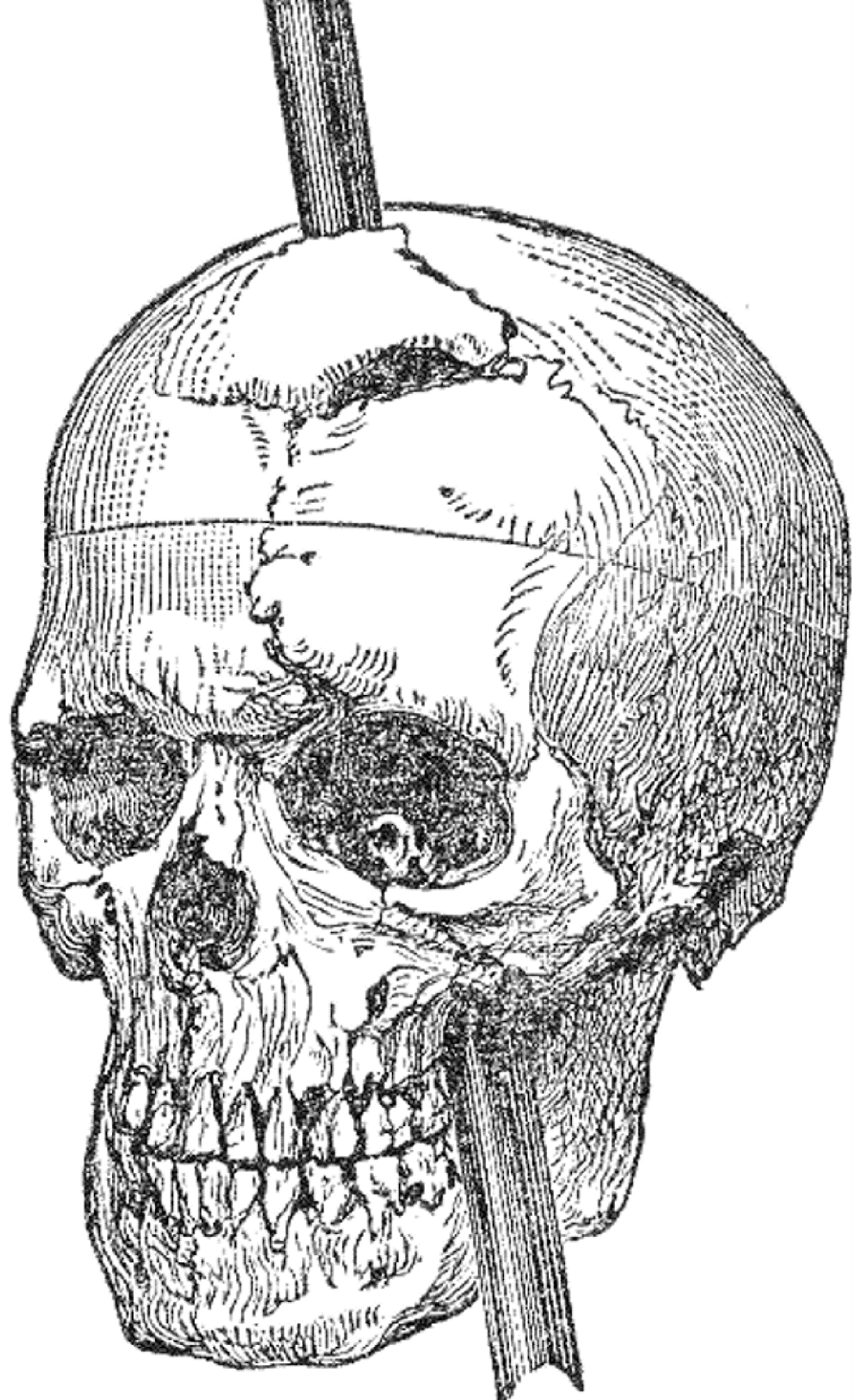


Heart-Centered, Data-Powered

Making decisions guided by values &
informed by data

Alexandra Mannerings, PhD





“ —
One might venture that either his **value system**
was now different, or, if it was still the same,
there was no way in which the old values could
influence his decisions. — ”

Damasio, Antonio R. Descartes' Error : Emotion, Reason, and the Human Brain. New York :G.P. Putnam, 1994.





“—
A **reduction in emotion** may constitute an
equally important **source of irrational behavior**
[compared to loss of cognitive function].
—”

Damasio, Antonio R. Descartes' Error : Emotion, Reason, and the Human Brain. New York :G.P. Putnam, 1994.





Who I Am



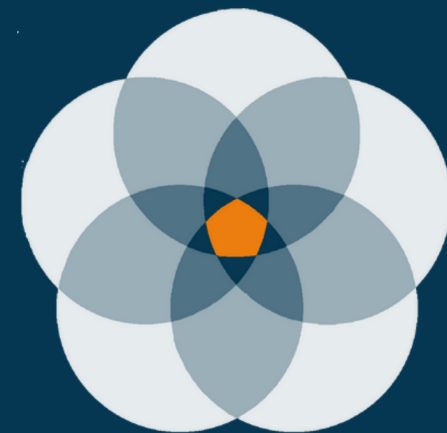
SCHOLAR

PhD from the University of Cambridge, UK



SCIENTIST

Researching across multiple continents and diverse fields




ENTREPRENEUR

Founded and run Merakinos, an analytics education and data services company for nonprofits



A photograph of two men shaking hands in a grand, arched hall. The man on the left is Black with short, curly hair, wearing a green jacket. The man on the right is white with short hair, wearing a red t-shirt. They are both smiling and looking at each other. The background features large, arched windows and a high ceiling.


How would you greet a client who came to your organization?

A photograph of two men shaking hands in a professional setting, overlaid with a dark blue tint. The man on the left is wearing a grey blazer, and the man on the right is wearing a red t-shirt. They are both smiling and looking at each other. The background shows a building with arched windows.

How would you greet a client who came to your organization?

A white arrow pointing from the text above towards the word 'Goal'.

Goal

A photograph of two men shaking hands in a professional setting, overlaid with a dark blue semi-transparent filter. The man on the left is Black and wearing a grey blazer, while the man on the right is white and wearing a maroon t-shirt. They are both smiling and looking at each other. The background shows a blurred office or public space with architectural details.

How would you greet a client who came to your organization?

Goal

**Values &
Constraints**

How would you greet a client who came to your organization?

Goal

Data

Values &
Constraints

A FLAT DECISION- MAKING LANDSCAPE



A FLAT DECISION- MAKING LANDSCAPE

It's NOT about following the numbers...
where are you even trying to get to anyway??



A FLAT DECISION- MAKING LANDSCAPE

- Values are required to give differential weight to options
- Decisions cannot be made without values
- The goal/value may not be explicitly stated or acknowledged...



WE'RE ALSO LOST WITHOUT DATA



- How do you know you are achieving your goals?
- How do you know if you within your constraints?
- How do you effectively evaluate options?



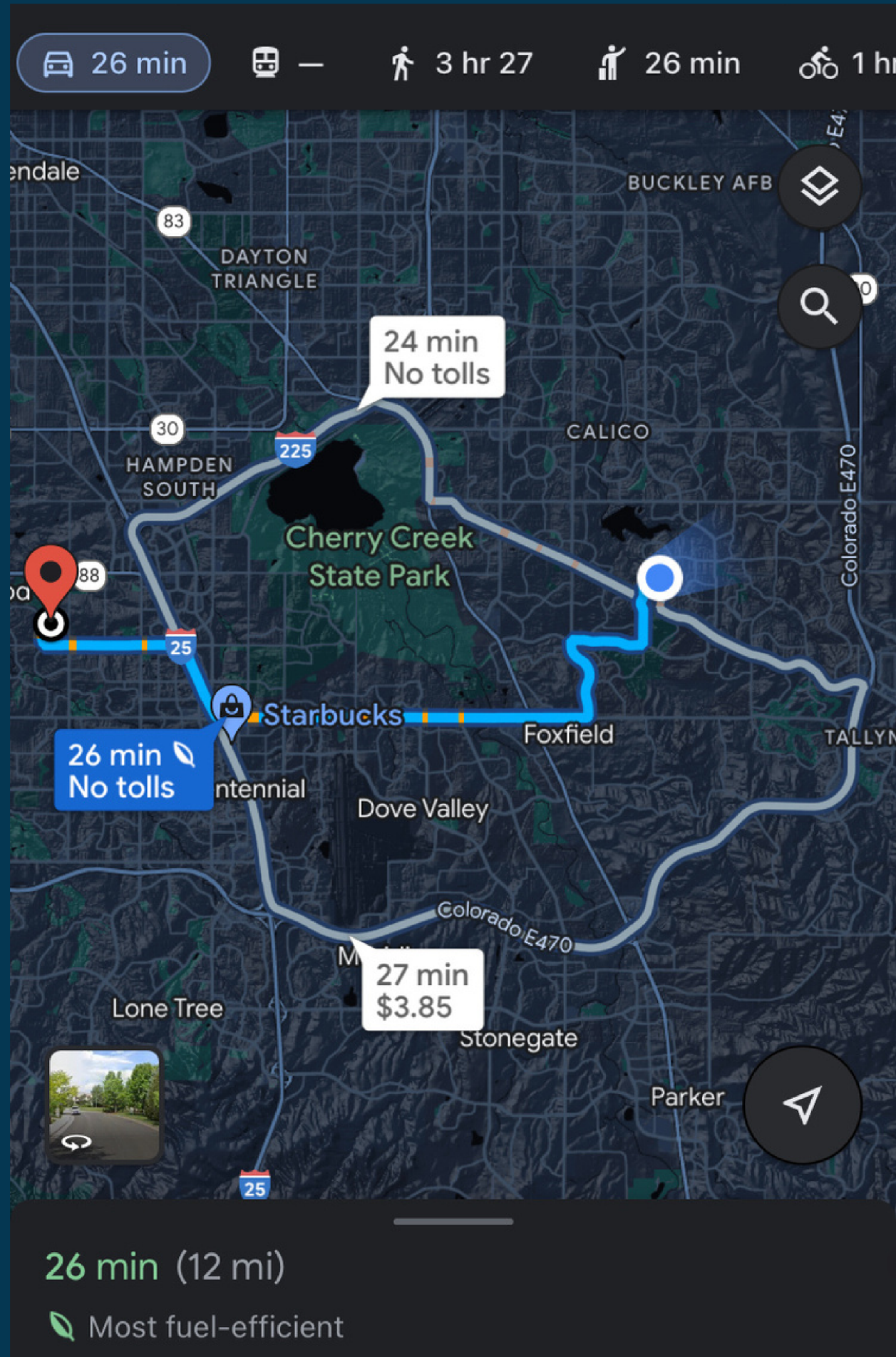


WHY WE NEED DATA

A cautionary tale...

<http://www.swjpc.com/general-medicine/2012/8/2/profiles-in-medical-courage-evidence-based-medicine-and-arch.html>



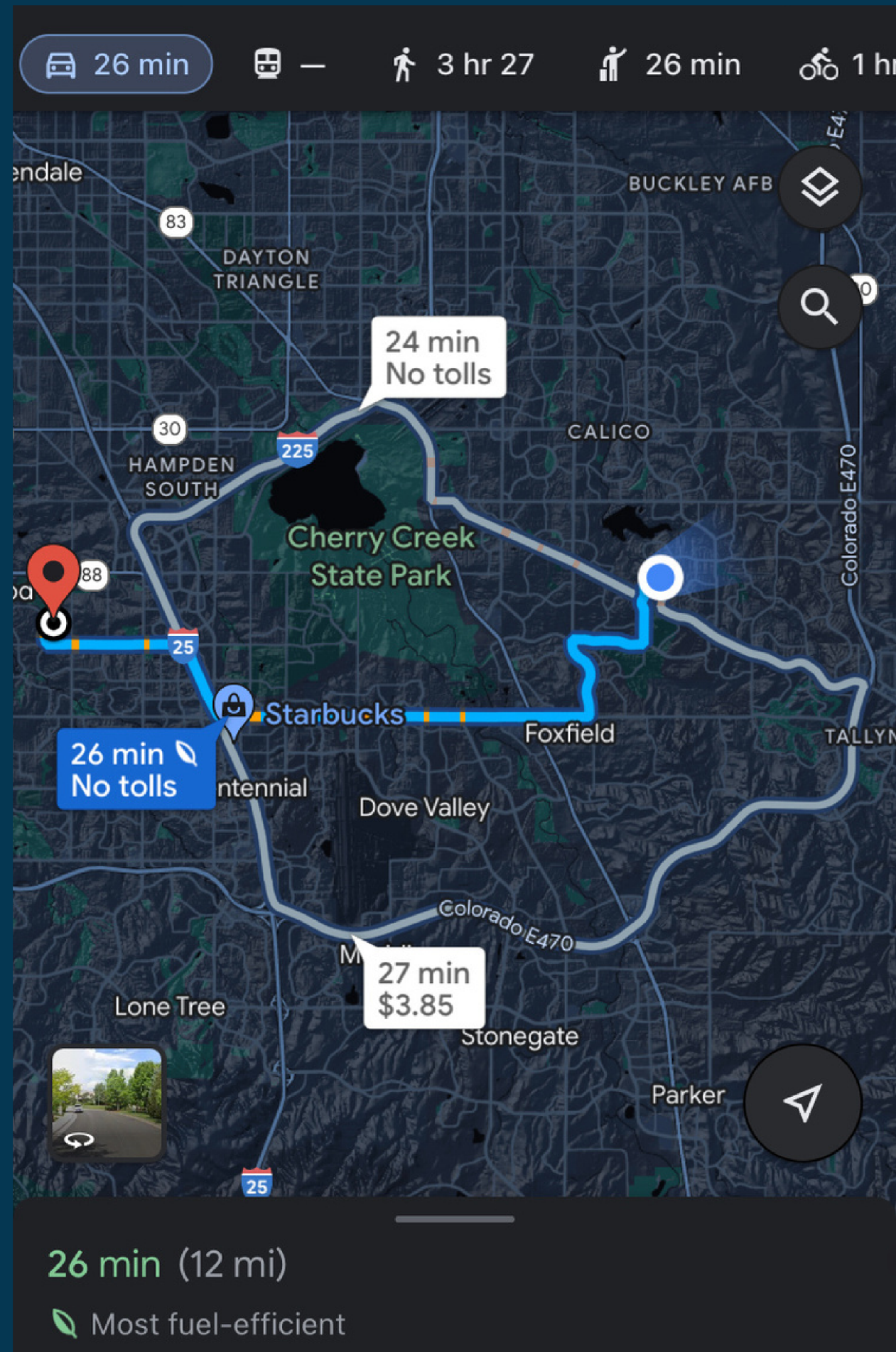


Which route should I take?



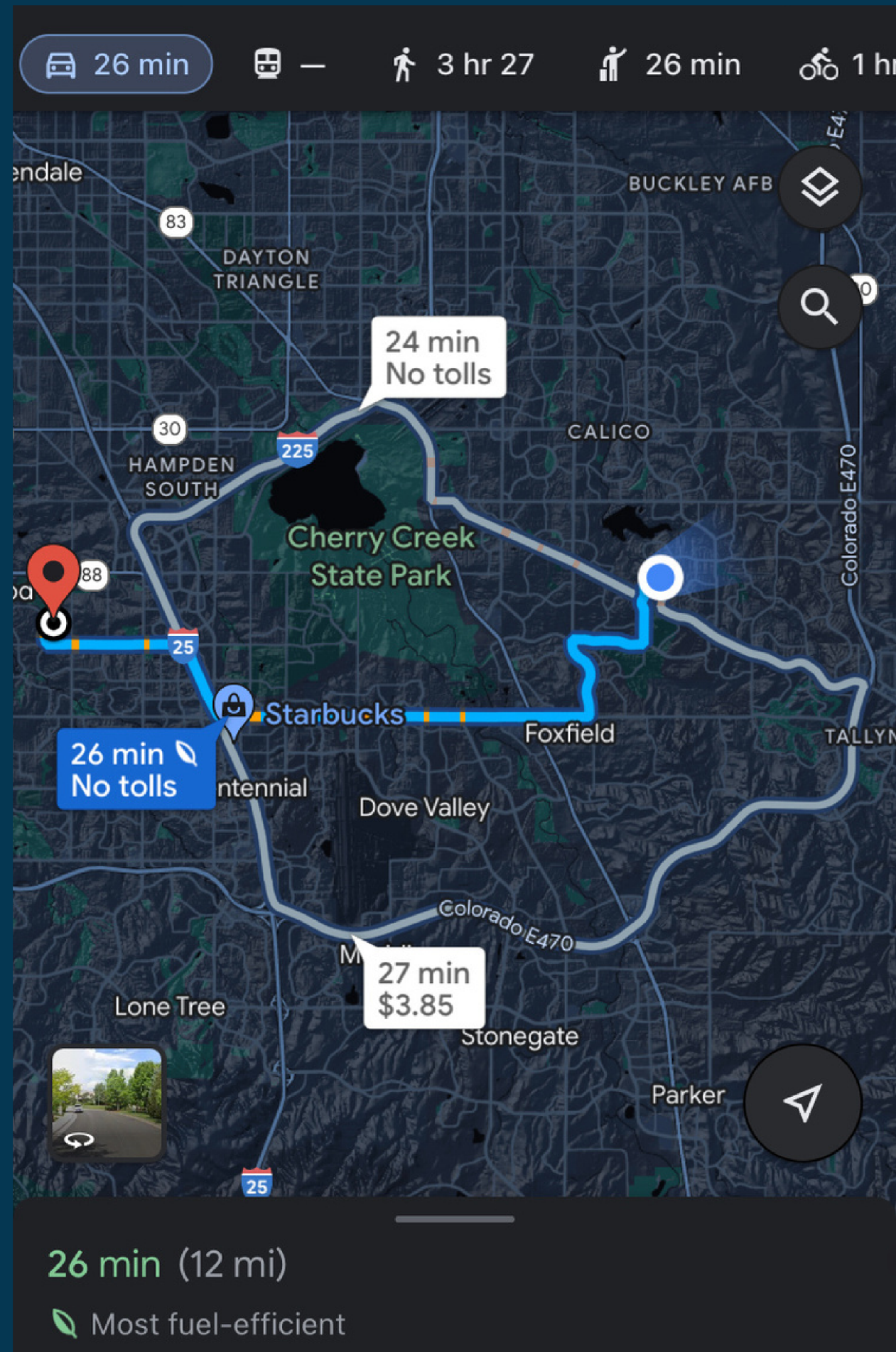
What makes Google work?

✓ A destination (and options to get there)



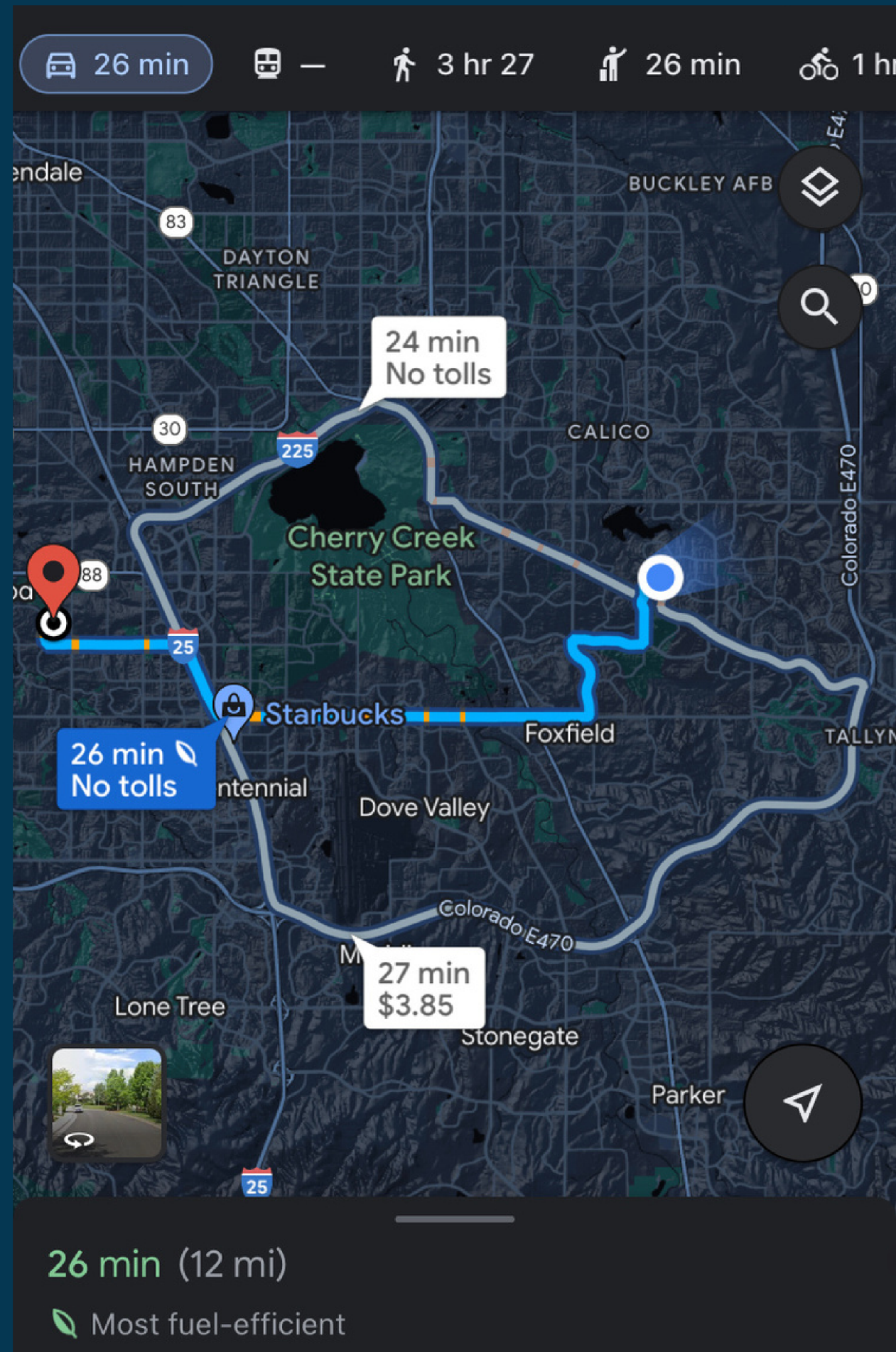
What makes Google work?

- ✓ A destination
- ✓ Knowledge & respect of constraints

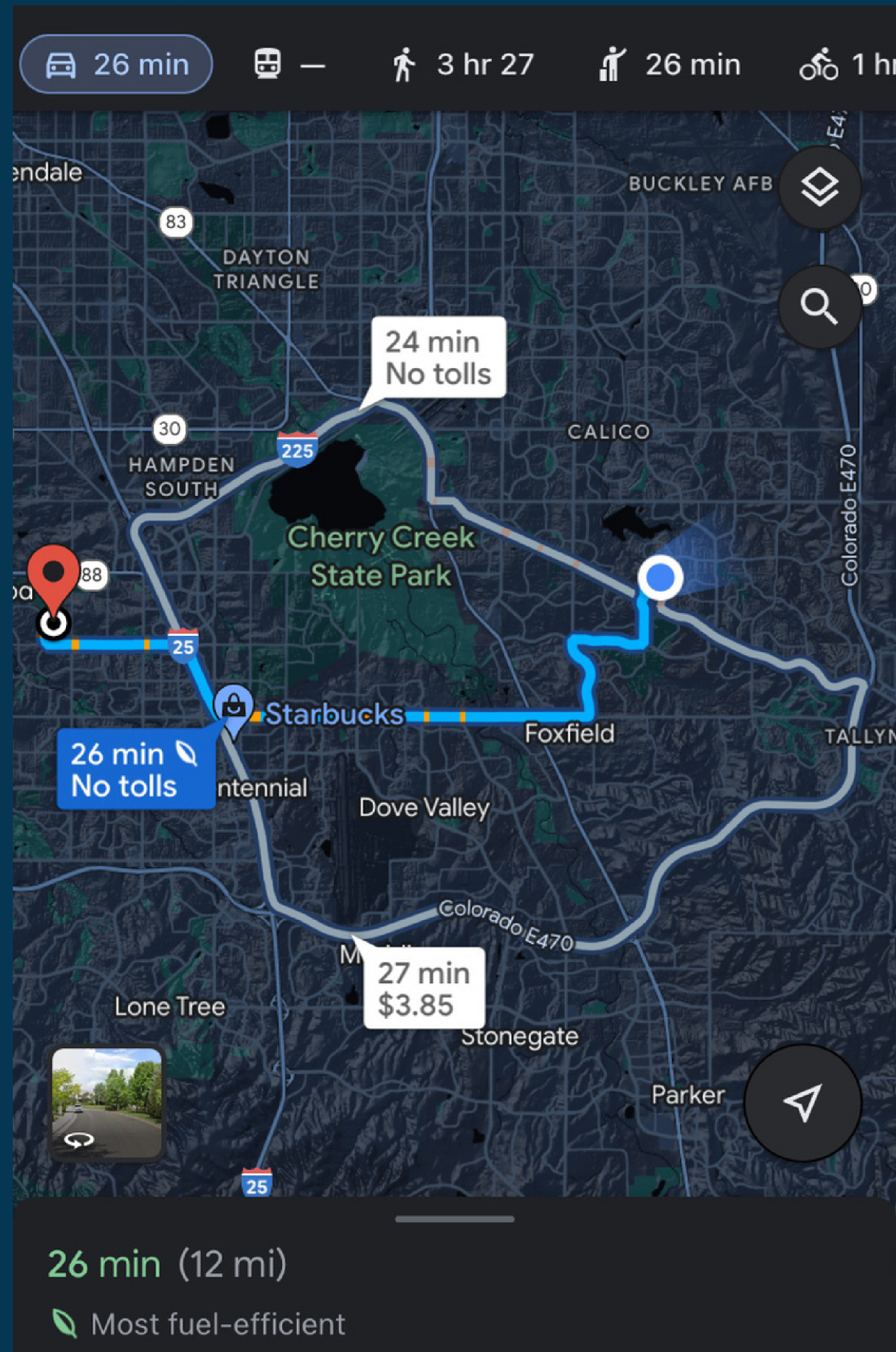


What makes Google work?

- ✓ A destination
- ✓ Knowledge & respect of constraints
- ✓ All the data



What makes Google work?



- ✓ A destination
- ✓ Knowledge & respect of constraints
- ✓ All the data
- ✓ Learning



EMMOTTE





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EMMOTTE

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● EDEN: YOUR DESTINATION

What is the perfect world you are building?

- What are you trying to achieve?
- This is chosen by what matters to you and your organization
- Data cannot tell you what this is
 - (though data will help you know if you get there...)





You try!



- What is something you hope to achieve or a challenge you are facing?
- What is the desired end-state (your Eden)?



MORALS/MITIGATION: YOUR VALUES & CONSTRAINTS

What are you willing and
able to pay to get to Eden?

- The 'eco way' vs the 'fast way'
- What matters to you & your org
- What parameters or resource limits you face
 - your 'limiting reagents'





You try!



- What are your organizational values that are relevant to this decision?
- What are the limits of your constraints?



OPTIONS: YOUR CHOICES

What possible paths exist to get you to your Eden?

- Brainstorm first!
- Then attempt to estimate how well each option achieves your primary goal





● OPTIONS: YOUR CHOICES

Data Point # 1: how close each option gets us to our goal



An architectural drawing of a floor plan is shown on the left side of the slide. It features several rulers placed over the drawing to indicate scale. The drawing includes labels such as 'TOILE 175x', 'CHAMBRE 2', and 'CHAMBRE 3 260x310'. There are also some symbols like 'Rq' in boxes. The drawing is partially obscured by the rulers and the orange vertical bar on the right.

TRIANGUATE: MEASURE THE OPTIONS

How do the options stack up?

Do any options fundamentally exceed resource constraints?



An architectural drawing of a floor plan is shown on the left side of the slide. It features several rulers placed over the drawing to indicate scale. The drawing includes labels for 'TOILE 175x...', 'CHAMBRE 2', and 'CHAMBRE 3 260x310'. There are also some symbols like 'Rq' and 'Rq' in boxes. The rulers show measurements in centimeters, with markings for 41, 42, 43, 44, 46, 47, 48, 49, and 50.

TRIANGULATE: MEASURE THE OPTIONS

How do the options stack up?

Do any options fundamentally exceed resource constraints?

Data Point # 2: amount of resource usage



TRIANGULATE: MEASURE THE OPTIONS

The typical equation: cost-benefit analysis

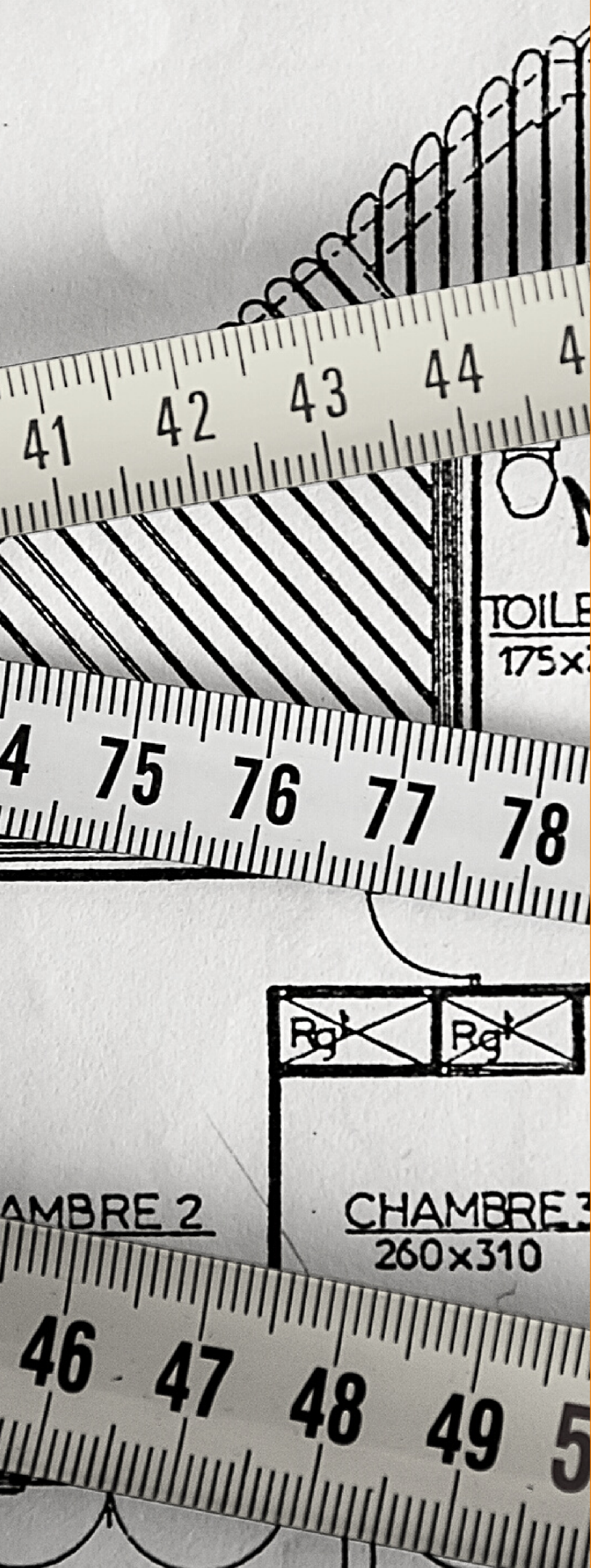
Benefit

Cost

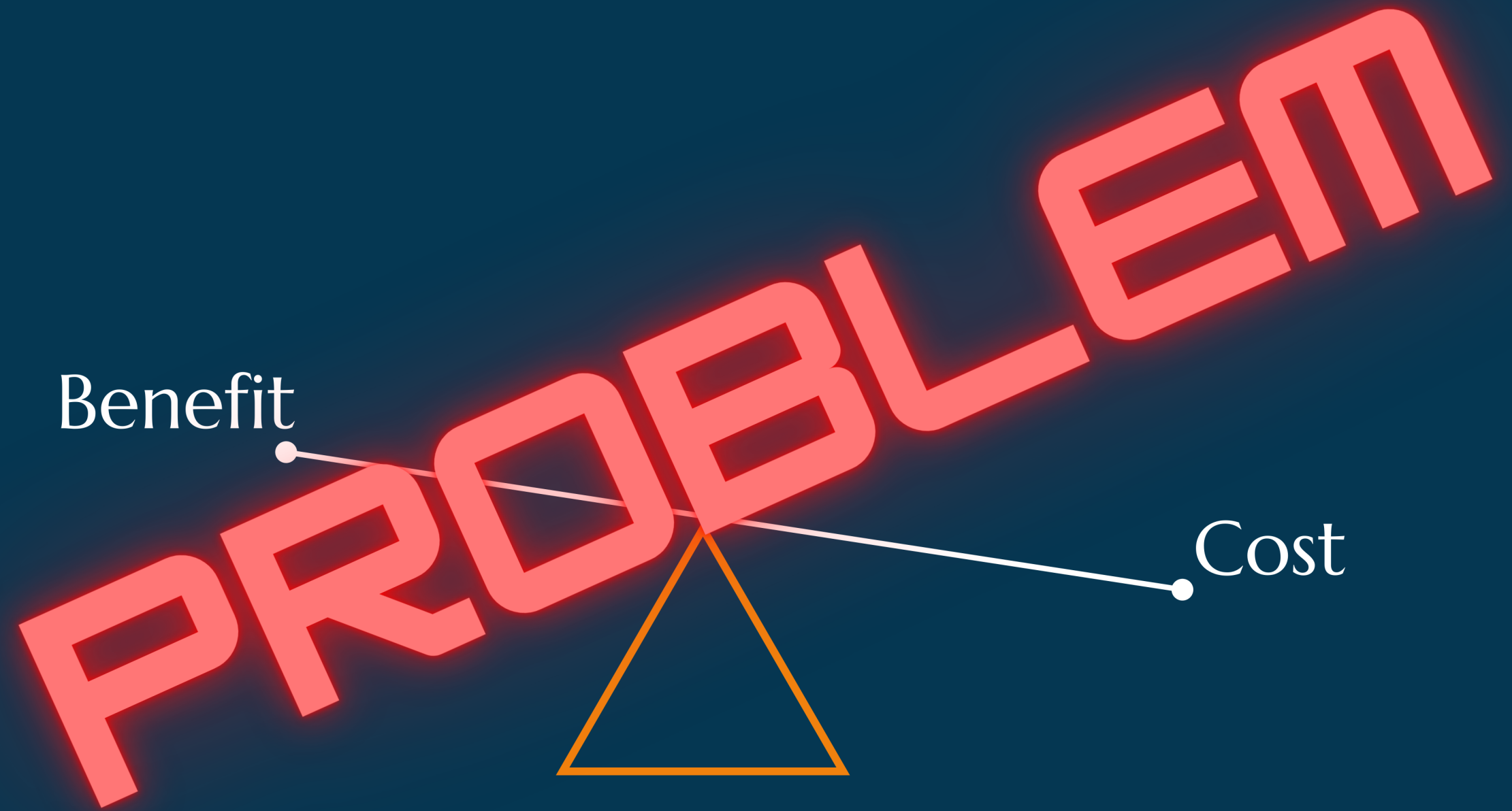
Data point #1

Data point #2

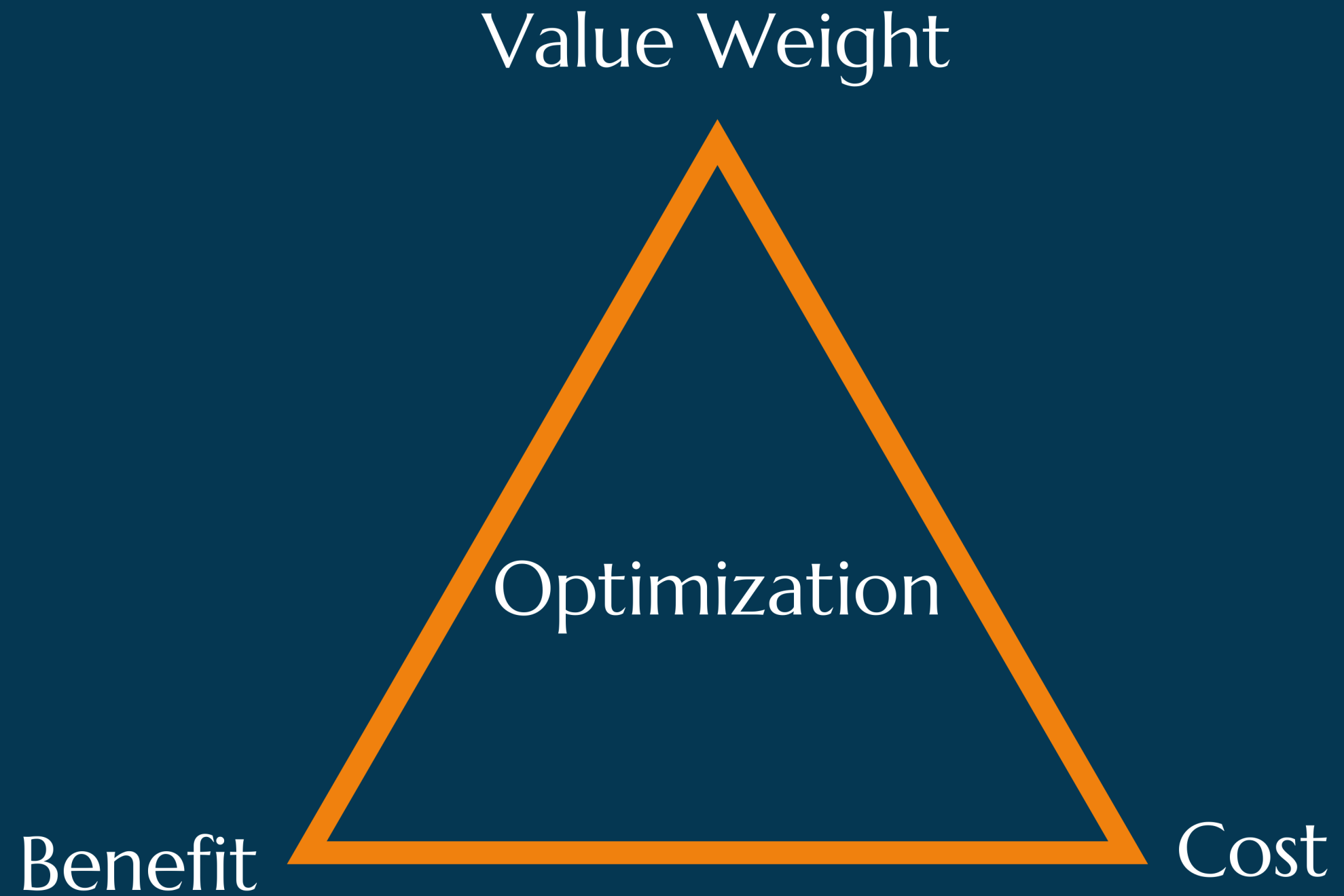


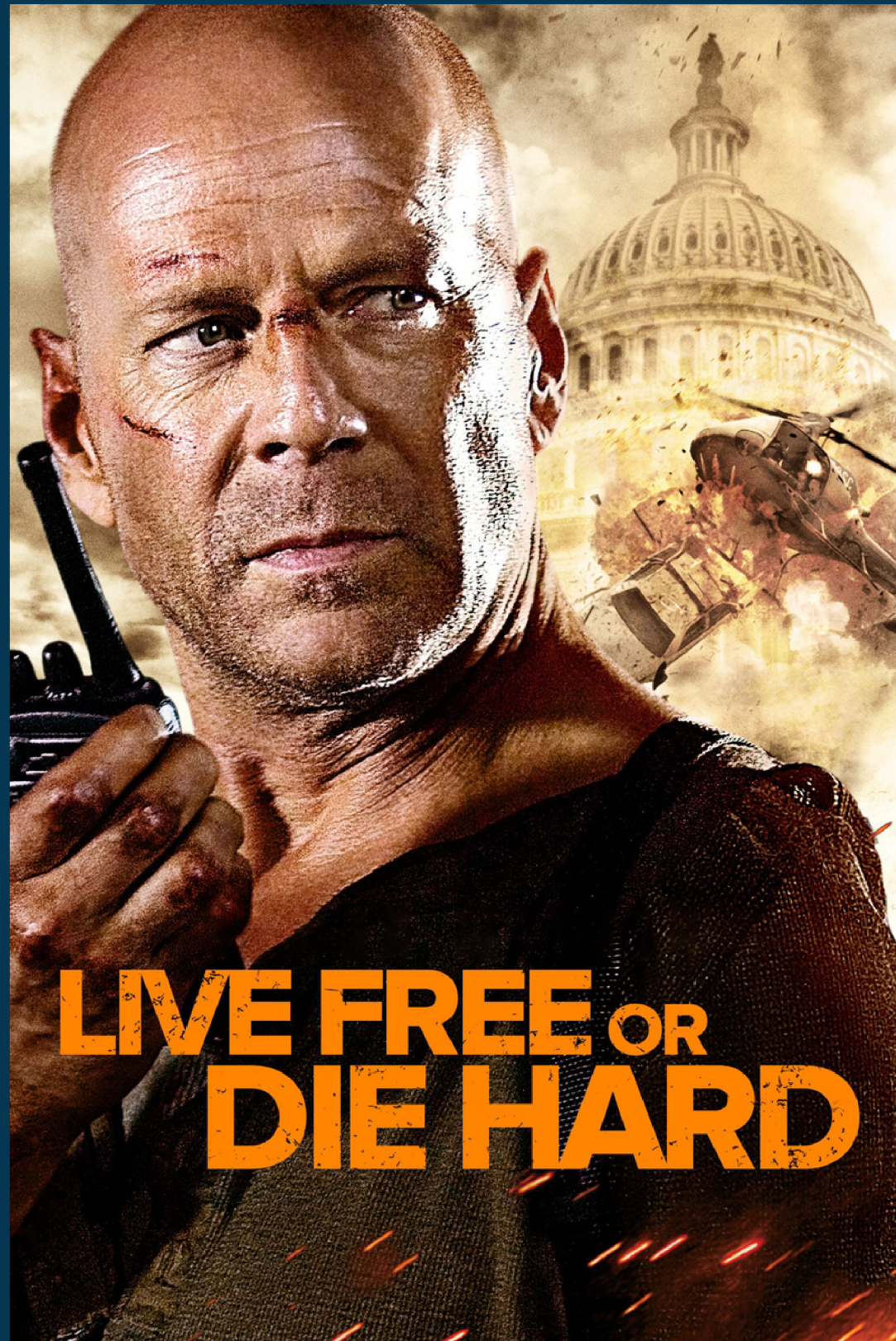


● TRIANGULATE: MEASURE THE OPTIONS

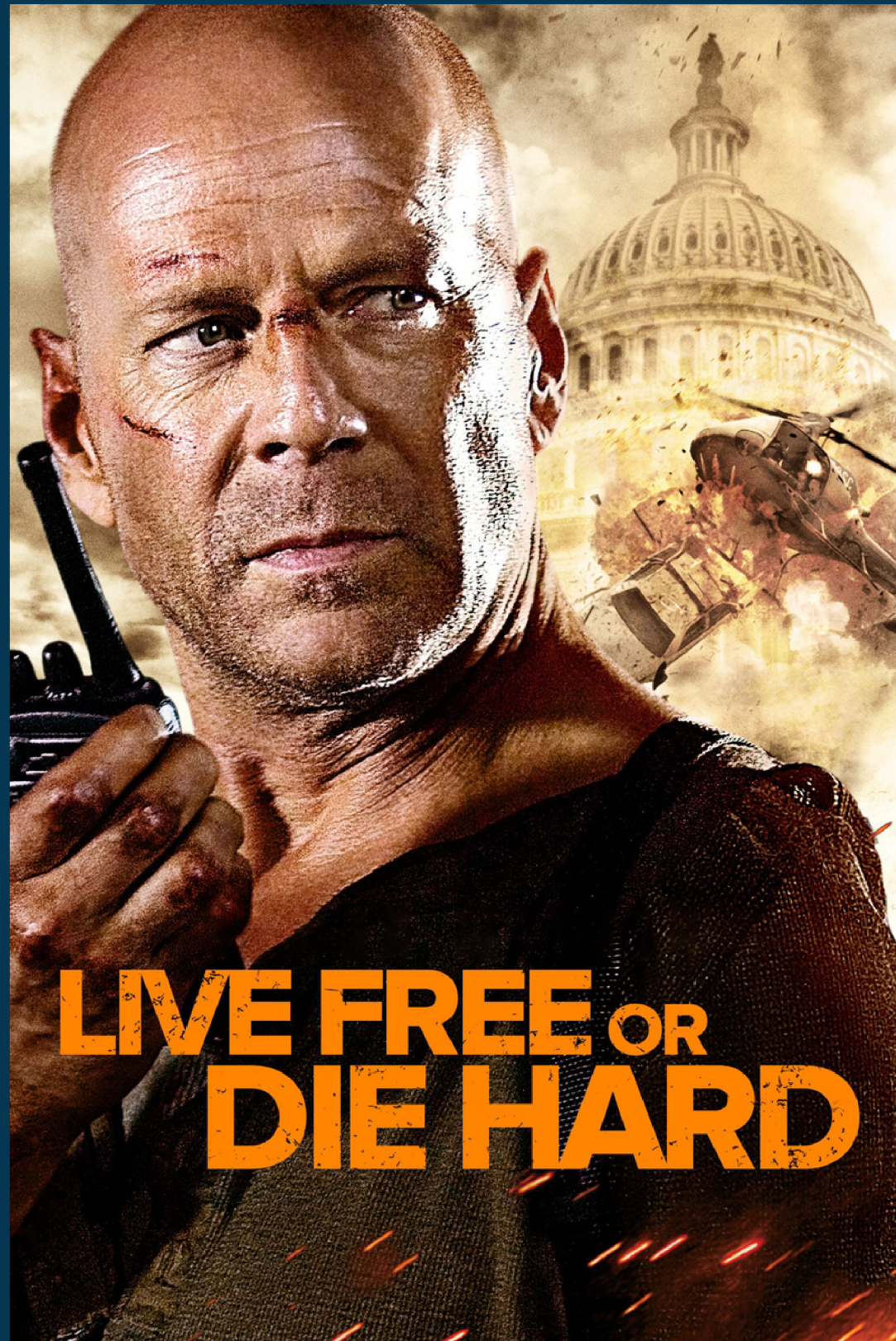


TRIANGULATE: MEASURE THE OPTIONS

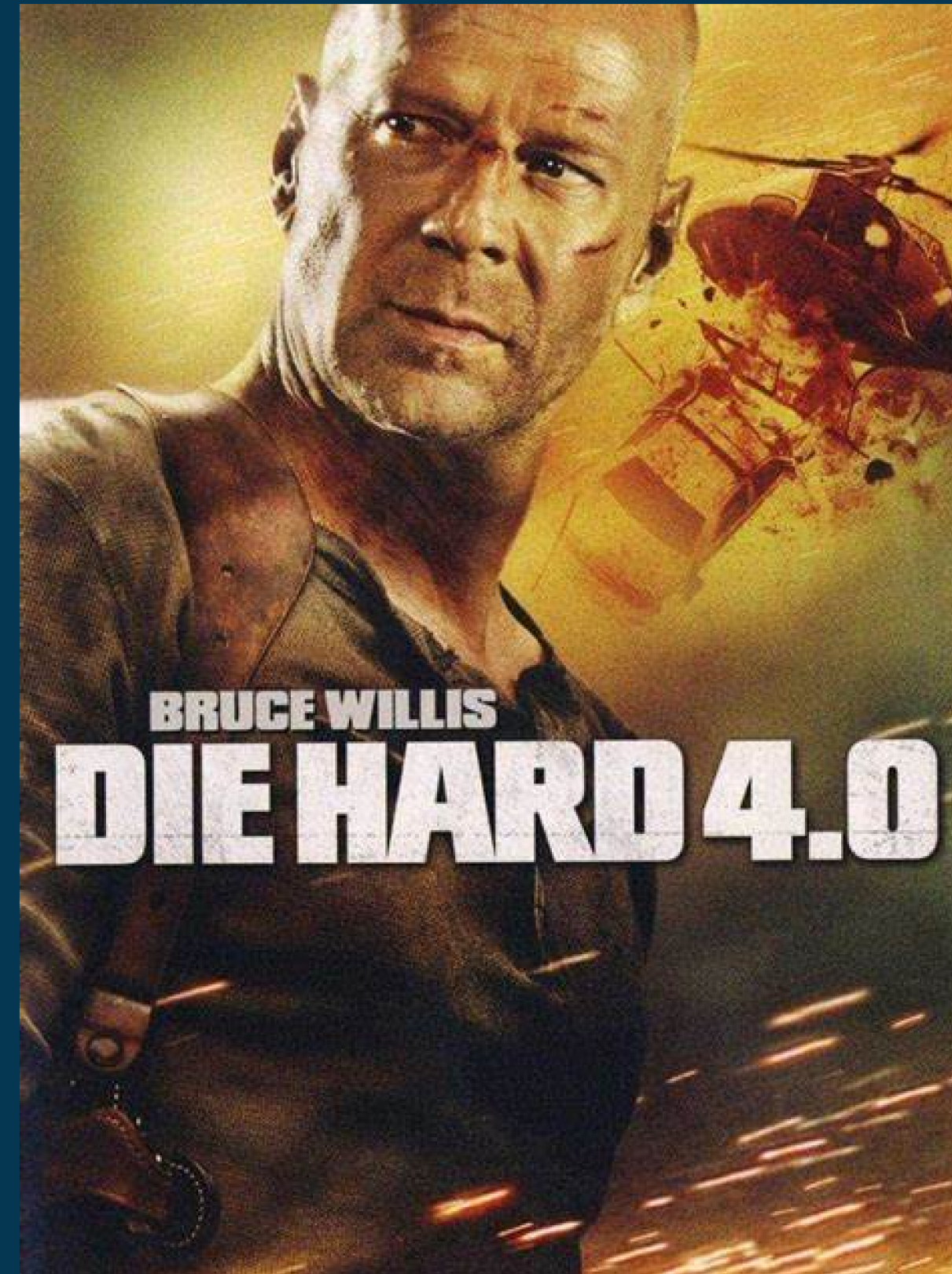




**LIVE FREE OR
DIE HARD**



**LIVE FREE OR
DIE HARD**



**BRUCE WILLIS
DIE HARD 4.0**



**Which would you rather
have...?**



THE TRIANGULATION GRID

Options

	A	B	C	
\$ Cost				Data point #2a
Time Cost				Data point #2b
Value 1				} Data points?!
Value 2				
Value 3				
Outcome benefit				Data point #1



You try!



- Take a stab at filling in your own grid for at least two of your options
- You may not have all the answers now, and that's ok!

THE TRIANGULATION GRID

A=book bags
 B=tutoring
 C=online class

Options

	A	B	C	
\$ Cost	\$10k	\$50k	\$5k	Data point #2a
Time Cost	50/50 hr	20/500 hr	500/10 hr	Data point #2b
Equity	↑	↑↑	→	} Data points?!
Environ. sustainability	↓	↑	↑↑	
Resilience	↑	↓	↑↑	
Literacy gained	20%	50%	8%	Data point #1

MEASURING VALUES

- Define how key values are expressed/achieved
 - This is a value judgment!
- Then find/collect key data points on those expressions from your options
 - could be qualitative or quantitative
- Consider a 'multiplier' or cut-off based on the relative weights of each value

MEASURING VALUES

- Some values may be difficult to measure
- Don't try to use the data points measuring amount of the value to settle disagreements about the weight of the value
- Others may feel inviolable, traumatic, or downright wrong to even consider as a 'cost'
 - but hiding/avoiding leads to bias

MEASURING VALUES

Avoidance → Opacity → Implicitness → Bias



RULES FOR CREATING EQUIVALENCY



**Judge options,
not people**



**Respect
organizational values**



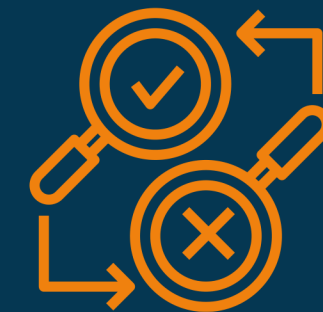
**Optimize, don't
perfect**



**What other voices
should be heard?**



Be transparent



**Recognize the
subjectivity**



EVALUATE: PICK & TRACK

We went with A!
...Did it work?

- Take our best guess, and return to evaluate
 - otherwise, learning can't happen





You try!



- How could you evaluate the costs and effectiveness of your choice?



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Values only

Values + data

Data only (mostly)





TIPS TO REMEMBER

- This framework is a way to argue about hard choices more effectively and respectfully

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- Set cutoffs 'a priori' whenever possible (before you get the data points)
 - "What data would convince me or change my mind?"

TIPS TO REMEMBER

- This framework is a way to argue about hard choices more effectively and respectfully
- Set cutoffs 'a priori' whenever possible (before you get the data points)
 - "What data would convince me or change my mind?"
- Respect that values different from your own are NOT wrong, just different
 - Don't use data to try to change values
 - Finding common values is often more effective than trying to change differing ones



Resources

HEART, SOUL & DATA

A podcast for community organizations getting started with data. On all the podcasting platforms or www.heartsouldata.com.

GET THE SLIDES, RESOURCE LINKS & MORE

www.merakinos.com/CNA22

MERAKINOS

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