# **PARTNER CPRM Data Dictionary Template**

This Data Dictionary Template provides a structured framework for standardizing data entry, ensuring consistency, and maximizing the PARTNER CPRM platform’s capabilities.

### **Benefits of Using a Data Dictionary:**

There are a lot of reasons to use a Data Dictionary while implementing PARTNER CPRM. These are some of the primary benefits provided by such a resource.

* Helpful tool for orienting new users to the data being tracked your CPRM.
* Ensures consistency in data entry (especially for attributes) because there is a shared reference defining each data field.
* Creates an audit trail of choices made about what to track and how.

While a Dictionary may not always be necessary, especially for SNA projects looking at one point in time, we generally advise taking the time to create one for ongoing projects.

### **Customize This Template For Your Organization:**

Here’s how to edit this template for your own use case and context:

* **Modify Field Names & Definitions** – Adapt field names and descriptions to match your organization’s terminology and workflow.
* **Update Dropdown Options** – Customize dropdown selections (e.g., Org Sectors, Services Provided) based on your ecosystem’s specific categories.
* **Adjust Data Entry Guidelines** – Define internal rules for data entry (e.g., naming conventions, formatting).
* **Expand Attributes & Relational Data** – Add organization-specific attributes and network relationship measures.
* **Integrate with Organizational Workflows** – Ensure alignment with your team’s processes for adding, updating, and analyzing data in PARTNER CPRM.

Use this as a living document—update it regularly to reflect changes as your network evolves.

Questions? Email our team for more information and support: support@visiblenetworklabs.com.

💡**Pro Tip:** We recommend saving and managing your Data Dictionary in a Google Doc, spreadsheet, Notion document, or other tool that allows for real-time edits and permission controls to prevent accidental edits.

## **1. Introduction**

A Data Dictionary is a structured reference that defines, standardizes, and ensures consistency in data entry across the PARTNER CPRM platform. This living document should be regularly updated to reflect new fields, attributes, and protocols as organizations grow and evolve.

### **How to Use this Data Dictionary**

* Utilize as a reference when adding, editing, or maintaining data in PARTNER CPRM.
* Adhere to naming conventions to ensure consistency across all entries.
* Use standardized dropdown options to avoid redundant or conflicting data.
* Regularly review and update the dictionary to reflect the evolving needs of the organization.

## **2. General Terms**

* **CPRM (Community Partner Relationship Management):** The PARTNER CPRM platform is a tool for mapping, tracking, and managing relationships within a community ecosystem.
* **CPRM Admin:** Users with administrative access who can create captures, modify attributes, and manage user roles.
* **Network:** A collection of relational data captured from members using survey questions to visualize and explore connections.
* **Member:** An entity (organization, group, or individual) in the network shown as a node and associated with various attributes, notes, and secondary contacts.
* **Secondary Contact:** Additional individuals associated with a member organization, including details like contact information, job titles, and additional notes.
* **Attributes:** Data points that describe the characteristics or properties of a member. Can be single-select (e.g., sector or focus area), multi-select (e.g., types of services offered: advocacy, referrals, technical assistance), open-ended text, or GIS-based (e.g., school district, census tract). Attributes are usually entered by users in the member library.
* **Relational Data:** Information describing relationships and interactions between members. Relational data is usually captured from members using a network survey or form questions.

## **3. Member Fields**

These are the approved member fields, attributes, contact info, and other member data.

*Template Note: Add any additional instructions or guidelines on who should edit member fields, including when, the steps or process, and whether they need to check for duplicate data or notes before creating/editing/deleting a new member.*

### **I. Member - Primary Contact**

| **Field** | **Definition** | **Data Type** |
| --- | --- | --- |
| **Org Name** | Full organization name. Acronyms in parentheses (e.g., *Community Health Network (CHN)*). Avoid special characters. | Open Text |
| **Map Label Name** | Copy of the Org Name (or an abbreviation if needed). Must be unique. | Open Text |
| **Website** | Organization’s website URL. | Open Text |
| **First Name** | Full first name of the primary contact. | Open Text |
| **Last Name** | Full last name of the primary contact. | Open Text |
| **Email Address** | Contact's professional email address. | Open Text |
| **Job Title** | Official title of the contact person. | Open Text |
| **Phone Number** | Contact’s direct phone number (format: *(123) 456-7890*). | Open Text |

### **II. Member - Primary Address**

| **Field** | **Definition** | **Data Type** |
| --- | --- | --- |
| **Search Address** | Auto-populates address fields if available. | Open Text |
| **Primary Address Street** | Official street address of the organization. | Open Text |
| **Primary Address City** | City of the organization. | Open Text |
| **Primary Address State** | State abbreviation (e.g., CO, NY). | Dropdown (Single Select) |
| **Primary Address Zipcode** | ZIP or postal code. | Open Text |
| **Primary Address Country** | Country of the organization. | Dropdown (Single Select) |

### **III. Member - Notes**

| **Field** | **Definition** | **Data Type** |
| --- | --- | --- |
| **Date** | Auto-populated date of note entry. | Date |
| **User** | Auto-populated username of the note author. | Open Text |
| **Text** | General notes on meetings, updates, or changes. | Open Text |

## **4. Secondary Contact Fields**

*Template Note: Explain your process for adding secondary contacts and what information should be included by default, including the “Additional Info” section.*

| **Field** | **Definition** | **Data Type** |
| --- | --- | --- |
| **First Name** | Secondary contact’s first name. | Open Text |
| **Last Name** | Secondary contact’s last name. | Open Text |
| **Email Address** | Secondary contact’s email. | Open Text |
| **Job Title** | Position of the secondary contact. | Open Text |
| **Phone Number** | Contact’s phone number. | Open Text |
| **Additional Info** | Notes on the contact's role or relevance. | Open Text |

## **5. Custom Attributes**

*Template Note: Add guidelines on when to create a new attribute, the process to follow, and how to add more rows and definitions. Sector and Primary Function are included by default.*

| **Attributes** | **Definition** | **Data Type** |
| --- | --- | --- |
| **Org Mission** | Description of the organization’s principle mission. | Open Text |
| **Primary Function** | Main function or focus of the organization. | Single Select |
| **Sector** | Organization’s sector based on tax classification. | Single Select |
| **Service Type** | Categories of assistance and programs provided. | Multiple Select |
| **School District** | School district each organization is located in. | GIS Attribute |

## **6. Relational Survey Questions**

*Template Note: These are placeholder questions. Replace them with the survey questions you choose to ask your network members.*

| **Question** | **Data Type** | **Response Options** |
| --- | --- | --- |
| **What type of interaction do you have with this partner?** | Multi-Select Matrix | Advocacy, Referrals, Meetings, Funding, etc. |
| **Describe the nature of your partnership.** | Single-Select Matrix | Inform, Consult, Collaborate, etc. |
| **Outcomes of this partnership?** | Multi-Select | Referrals, New Programs, Policy Change, etc. |

*This template provides a standardized approach for maintaining data consistency in PARTNER CPRM. It can be adapted as needed based on organizational requirements. 🚀*

***Last Update: Feb 20, 2025***