AMPLIFY YOUR STORY: Turning Data into Dashboards

Purpose: Data are ideally used for making program decisions, tracking emerging client issues, and delivering high quality services. However, staff often find themselves collecting information, entering it into databases, and then using this data only to provide funders with the numbers they require. If you want to change that – if you want to see and use data for the purposes of your own work – dashboards may be for you. This handout will support you in developing processes to turn the data you collect into dashboards that visually summarize the stories of your program into accessible, compelling reports customized to your various audiences.

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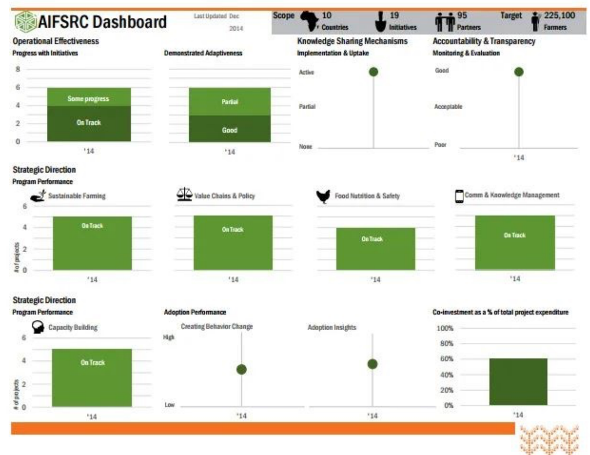
Dashboard Basics

A dashboard is a data visualization tool that allows you to easily see the most relevant performance metrics. Below are a few central elements of an effective dashboard:

Audience: Dashboards are not one-size-fits-all. The metrics included on each dashboard should be catered specifically to the intended audience.

Action: Dashboards are meant to inform, inspire, or move their audience. The data included on a dashboard should have an actionable message.

Story: A dashboard is used to tell a specific story. To tell the story, your findings should be presented in an intuitive way so that the audience gets a complete understanding of what they are seeing. More than telling the facts, you should strive to support them with context or benchmarks that amplify the emotion of the story you are presenting.



Dashboard Visuals 101

Reduce visual clutter: Take out gridlines that are not needed to understand the data. White space is good!
Use icons and images: For flow, consider using simple images that communicate content and attract the eye.
Categorize: Separate data into logical content sections.
Use your branding: Include your logo and use org colors.

Defining Dashboard Contents

For each dashboard, first go through the steps below to define what you need to start building the dashboard.

1: Stakeholder — **Who is the dashboard for?** You may want to include the stakeholder in defining steps 2 and 3 to ensure it is as useful as possible for them.

2: Purpose/Frequency — **How do they plan on using the dashboard**, *and* **when do they need it?** Defining the purpose helps determine the contents of the dashboard.

3: Metrics to Include — **What information** is needed for an actionable dashboard? The contents should inform, inspire, or somehow *matter* to the audience.

4: Data Fields Needed — **What data fields** are needed to provide the desired metric? Usually, more than one data field is needed for a given metric.

5: Report Needed — **What reports** (from database) or documents are needed to access these data fields? These are needed to build the dashboard.

Organizing Dashboard Information

To organize and make your plans for a dashboard, you may want to create a spreadsheet like the one below.
For tips on choosing which metrics may be important, see the* ***Collect Meaningful Data: Conducting a Data Review* *emPower Tool.*

Stakeholder	Purpose/Frequency	Metric/Measure	Field(s)	Report(s)
Home Visitor	Monthly Progress	Client Attendance (by home visitor)	Date, client ID, attendance status, home visitor	2122 – Home Visits
Home Visitor	Monthly Progress	Client Attendance (by referral source)	Date, client ID, attendance status, referral source	2122 – Home Visits 2389 - Intake

Building Dashboards

Actually *building* a dashboard may be the most intimidating part of this process. For more information on how how to choose the best charts and graphs for your data, see the ***Amplify Your Story: Data Visualization*** *emPower Tool.*

Sketch it Out

Before building it, draft your plan and get feedback from the stakeholder(s). Include them in the process and save time!

Choose Your Platform

Consider: will others be able to access this and use it going forward? Am I able to easily connect data to this platform?

Data with Dashboard

If using a platform like Excel, always have copies of the data being used in the same workbook as the dashboard!

Build to Print

Construct the dashboard draft so that it will print well. Include headers, footers, and margins.

Organizing Dashboards

The more dashboards you build and disseminate the more difficult it can be to keep track of them all. You may want to make two spreadsheets (or two tabs in one sheet): one with **general information**, and the other a **to-do calendar**.

1. General Information Spreadsheet

This spreadsheet contains the important information for each dashboard. This will**, 1)** reduce the information the person in charge has to remember, and**, 2)** provide an easy reference if the person responsible for dashboards changes. Below are some columns you may want to include:

- **Stakeholder(s) –** the key people/audience for that particular dashboard (funder, role or format)
- **Name of Dashboard –** a descriptive name to differentiate dashboards from each other
- **What to Include** – the information to be included on the dashboard (like name, age, etc.)
- **Where to Find the Data** – where to find the data needed (which report or database)
- **Dashboard Template** – where to find the dashboard template that has been built
- **Distribution Information** – where the dashboard should be distributed (contact info)
- **Person Responsible** – who is responsible for building/maintaining that dashboard
- **Notes** – anything else someone would need to know about the dashboard

HELPFUL HINT
Whenever you organize information into a spreadsheet, **add filters to the columns**! This will allow you to isolate the information you are looking for.

2. To-Do Calendar

This spreadsheet contains a calendar including deadlines for all dashboards (and reports due to funders as well if you wish!). Below are some tips on how you may want to organize this:

Stakeholder	Name of Dashboard	January	February	Etc.
BSK	*Semiannual*	**31** – Report Due		
Home Visitor Supervisor	*Monthly*	**1** – Pull data **7** – Dashboard completed	**1** – Pull data **7** – Dashboard completed	

Recording Dashboard Processes

Once you have completed all of the above steps, you may want to document the process you use to build each dashboard. This will allow you to consistently complete the dashboard in the most effective way without reinventing the wheel every time, and create sustainability so someone else could complete the process in the future. *For more tips on process documentation, see the* ***Improve Your Workflow: Define and Document Processes emPower Tool****.*

1. **Keep it to one page.** Concise instructions are easier to use.
2. **Use charts and visuals.** Flow charts in cases where there is more than one way to do it. Screenshots when it's helpful!
3. **Number and label steps.** This makes it easy to follow, even without previous knowledge of the process.