

Creating Dashboards For Grants Management

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ATE PI Conference



Major Changes in Federal Grants Management 2017

1. Focus on Outcomes
2. Performance Metrics
3. Risk Assessments
4. Financial Management Policies
5. Equipment Use
6. Micro purchases
7. Corrective Action
8. Family Friendly Policies
9. False Claim Certifications
10. Audit Thresholds

Source: Brustein & Manasevit, www.bruman.com



Your Knowledge and Skill

- Is increasingly called upon in the grant management area
- You can help set up a viable process for projects to begin tracking their success

Dashboard Elements

Dashboard (Sample)

Data and Trends	
Metrics and Measures	
Key Performance Indicators (KPIs)	

Dashboard Elements

Dashboard (Sample)

Data and Trends



Metrics and Measures

Key Performance Indicators (KPIs)



Dashboard – Data and Trends

Dashboard (Sample)	
Data and Trends	
Awards by College	
Occupational Programs	
5-year Program Trend	
5-year Award Trend	
Metrics and Measures	

For Your Project Management Team?

What are the most important trends and data that you track?



Elements: Distinguishing

Dashboard (Sample)	
Data and Trends	
Metrics and Measures	
Key Performance Indicators (KPIs)	

Poll #1

Choose the Best KPI

A. Number of workshop attendees

B. Number of workshop attendees
implementing model curriculum

Poll #2

Choose the Best KPI

A. Program Enrollments

B. Fraction of Underserved Populations
Enrolling in Programs

Audience?

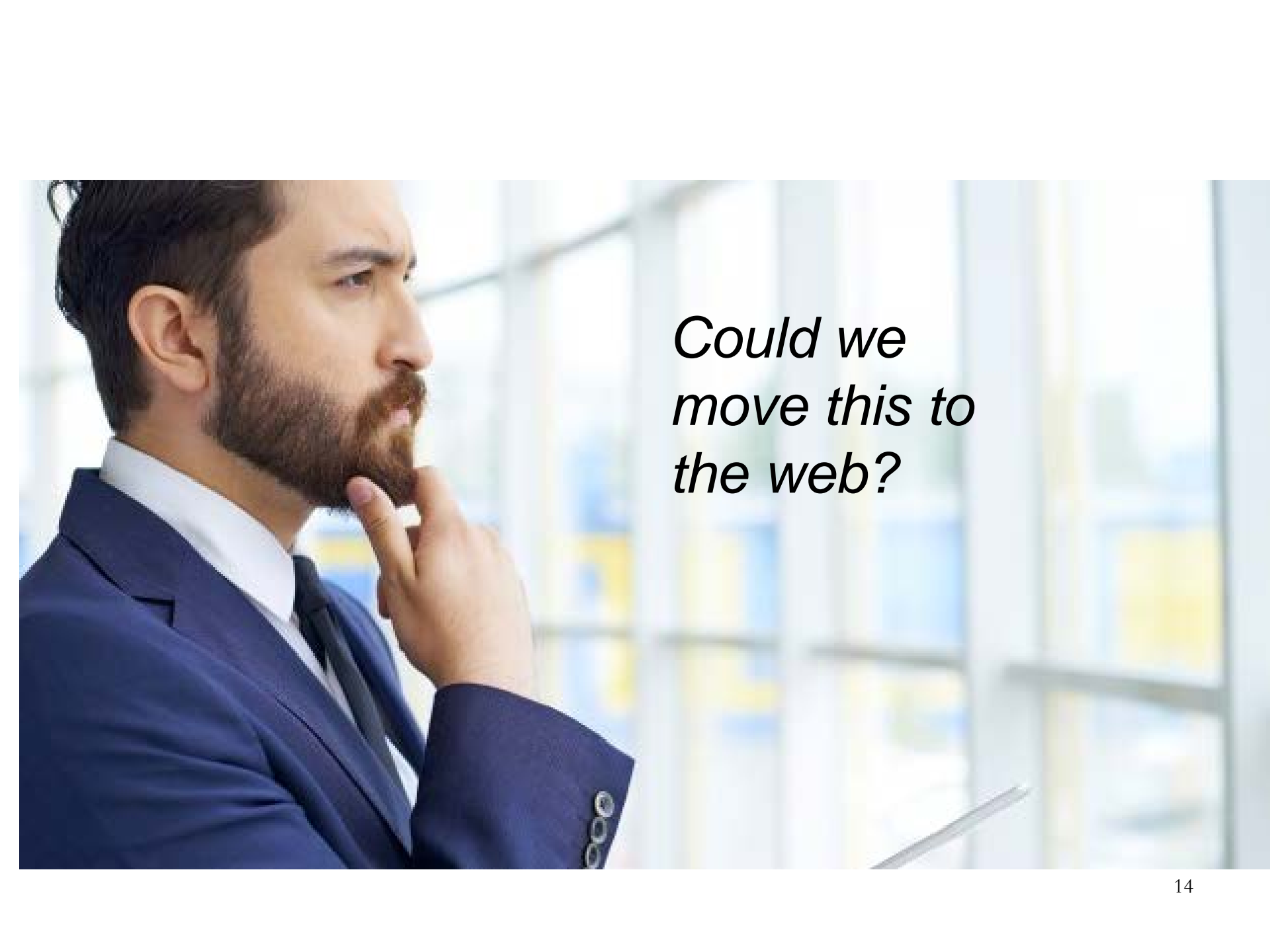
Do you have Key Performance Indicators?

KPIs Distinguished by Direct Link to Big Goals

<p>Number of occupational program completers passing a licensing exam or earning an industry-recognized credential</p>		KPI	2011	2012 (Preliminary)
		% of Alumni Employed	67.6%	82.9%
		No. of Graduates	923	910
		RN-NCLEX Pass Rate	94.2%	97.1%
		Graduation Rate	79.6% <i>(2008-2009)</i>	75.6% <i>(2010-2011)</i>

Example KPI for Professional Development

Fraction of participants who made a significant change in their course or curricula after attending

A man with a beard, wearing a blue suit, white shirt, and dark tie, is shown in profile from the chest up. He has a thoughtful expression, with his hand resting on his chin. The background is a blurred office interior with large windows. Overlaid on the right side of the image is the text "Could we move this to the web?" in a black, italicized font.

*Could we
move this to
the web?*

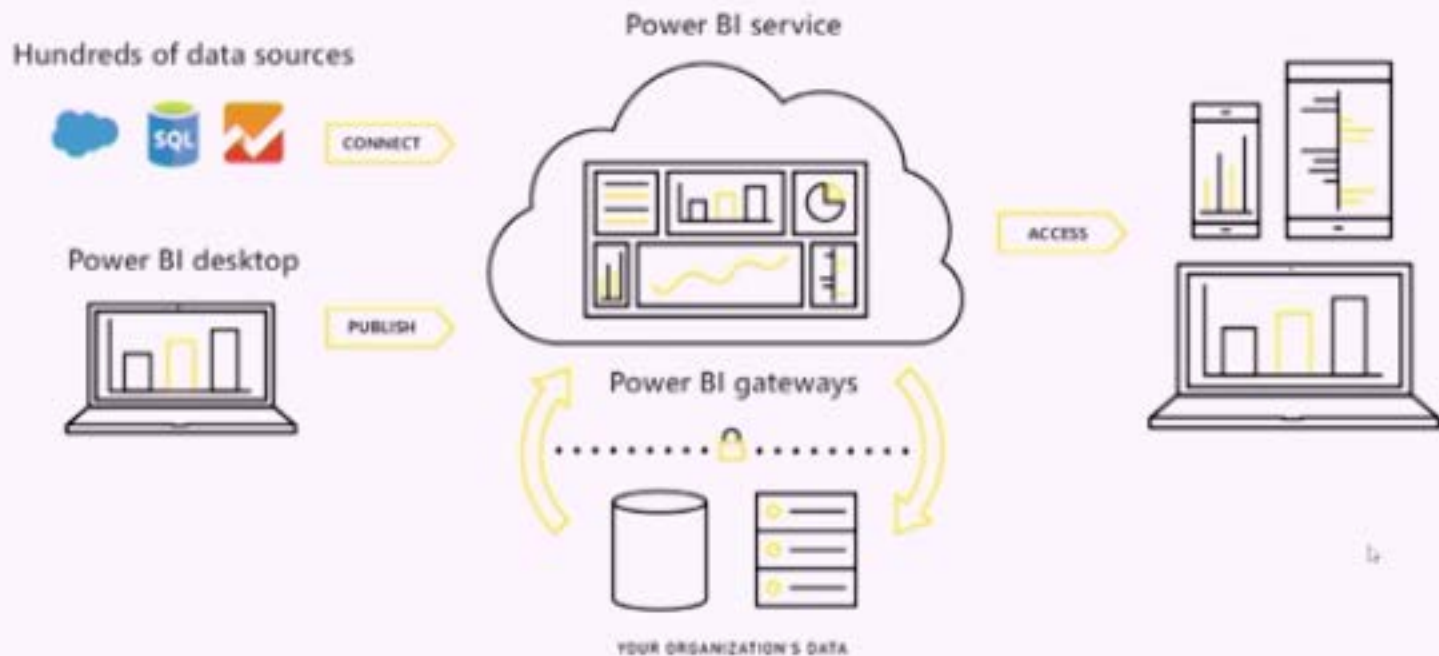
Yes

Microsoft Power BI

Business Intelligence is cloud service that provides non-technical business users with tools for aggregating, analyzing, visualizing and sharing data

Tableau also an option

What is Power BI?



In the Cloud

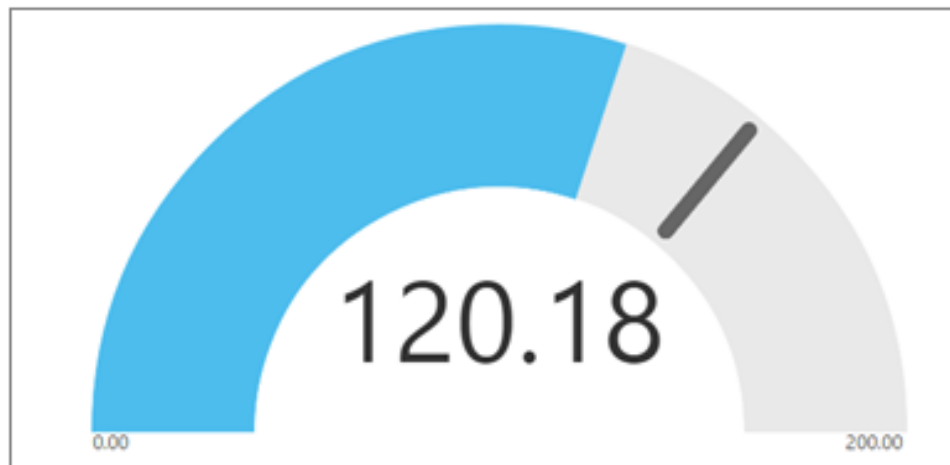
- Establish your data in Excel (or CSV)
- Determine the relationships you wish to display
- Select the visualization



Maps: Basic maps



Gauge charts



Waterfall charts



Example: Remote Access of Instrumentation for Nanotechnology

<https://app.powerbi.com/view?r=eyJrljoiZTdIMmQ5MWItMzBjYy00MTU4LWlxODctY2EwNGU4YmIwOGI5IiwidCI6IjhhNWl2ZmQyLWYyMGQtNDU2NS05MTBhLTFmZmU2NDU0ZTM2OCIsImMiOiZ9>

Microsoft Power BI

powerbi.microsoft.com

POWER BI

Cloud collaboration and sharing

Use Power BI Pro to share and distribute reports with others, without any complicated setup. Get started now with a free 60-day trial of Power BI Pro.

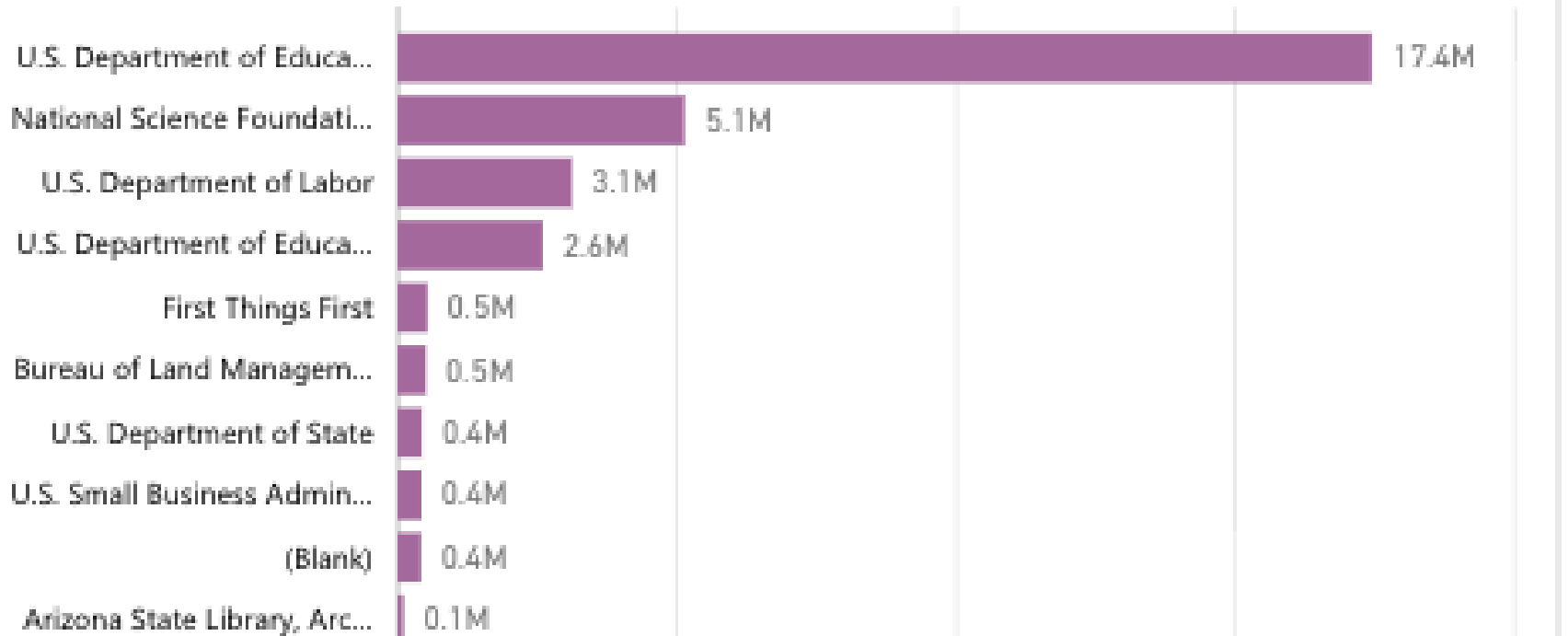
TRY FREE >

Difficulties: The Dark Side of Dashboards

- Using the Right data, avoiding the Wrong data
- Too much extraneous information
- If you can not really use a dashboard item then drop it
- Keeping it evergreen

Make the Title of the Graph
Tell the Story

Total Funded by Funding Source (Only Shows Funding Aligne...





Practical Hints

- Encourage ownership by including the “Dashboard” as an agenda item in a staff meeting
- Then call for updates
- Be able to link to the Big Goals and Objectives



Summary: You Can Now

- Describe the elements of a dashboard
- Distinguish informational elements from trends and Key Performance indicators (KPIs)
- Create ownership to make the dashboard a dynamic reporting tool
- Develop your own dashboard
- Think about the possibility of moving it to the web

Own Your
Dashboard!





Make Your Dashboard Real and Evergreen

- Ownership
- Renew/Update process



Questions

Ask Frequently, Ask Often

Follow Up Questions Welcome

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