# WELCOME!

Tell us about yourself:

- Name
- Organization type (government, nonprofit, philanthropy, or education)
- City, State



# AGENDA

- 1. Introduction
- 2. Why You Need A Dashboard
- 3. Use Cases
- 4. How Do You Create A Dashboard
- 5. How To Use Your Dashboard



# Join at slido.com #609240

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### Who We Are

Transform Consulting Group (TCG) is a woman-owned, strategic, and data-driven consulting firm.



Who We Help

### GOVERNMENT

Our team has experience working inside and outside of the government – at both the state & federal level.

### NONPROFIT

Whether it's fundraising, grant writing, or organizing data we can help you get on track with our systematic approach.

### **EDUCATION**

Our experience in working with all sectors – from early education to adult education – provides a comprehensive foundation to realize positive student outcomes and community impact.

### **PHILANTHROPY**

We support philanthropic partners who are conveners in their communities.



## **Our Solutions**





## Our Team



### Amanda Lopez President

As TCG President, Amanda provides strategic direction for the company and leadership on all client projects. She leads a team dedicated to helping organizations make sense of data through the development of tools and systems. Amanda works with organizations and their leaders to develop competencies and skills to make them more effective and sustainable. This often results in creating strategic plans, fund development plans, and board governance tools. She is passionate about bringing together diverse partners to address the problems that are bigger than any one organization can solve alone (following a <u>collective impact framework</u>).



## Our Team



### Sara Gropp Data Manager

Sara holds a bachelor's degree in business management and educational studies from Manchester University. At TCG, she has led the process of data collection, analysis, and visualization for many nonprofits and government agencies. Sara is a certified Tableau Desktop Specialist. She has developed data dashboards for many projects, including communications dashboards and program evaluation studies. She analyzes data and produces the best charts and tables to visualize the data and tell a story.

### Why You Need A Dashboard



"I cannot tell you how important the dashboard site will be for strategic planning, strategic growth, grant writing, updating cases for support and general resource development. Thank you for what you and your team are doing to support Indiana Boys & Girls Clubs."

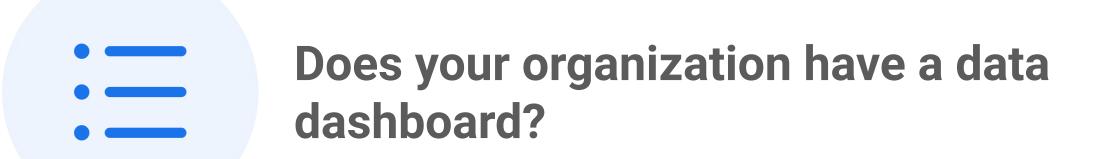
Jeff Amy, Director of Organizational Development



# How do you see a dashboard benefiting your organization? (mark all that apply)

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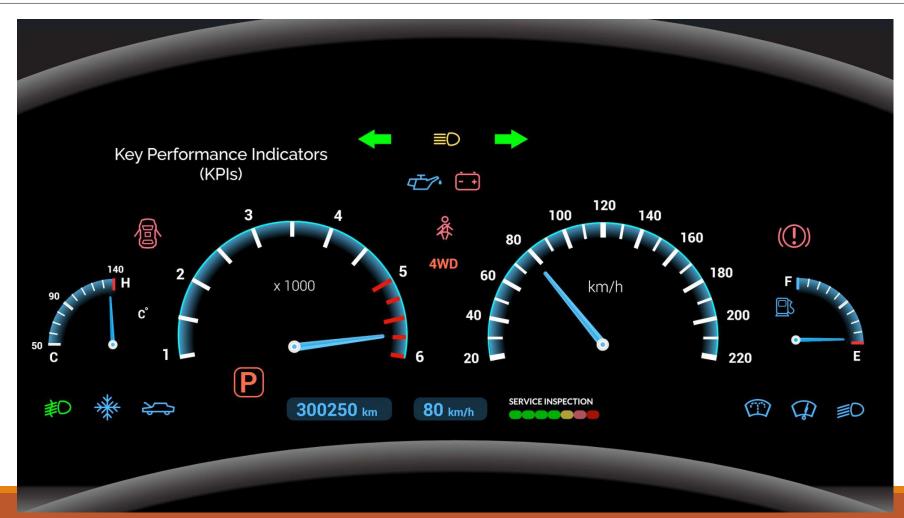




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# We All Have A Data Dashboard





# Why You Need A Dashboard

- Answer your organization's questions
- ✓ Give insight quickly
- Make your data meaningful
- Monitor impact
- Manage impact
- Manage project completion
- Promote your work
- Create static reports and infographics
- And more!



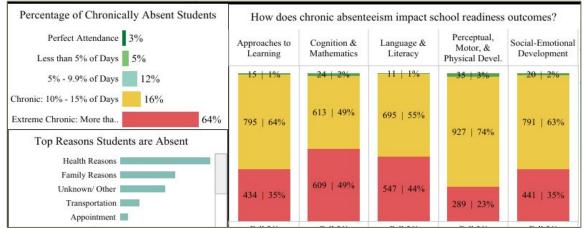


### **Organization Dashboard**

Purpose:

- Connect multiple data sets
- Track, monitor, and report out on key metrics
- Move beyond compliance
- Equip staff/ team with data to make decisions

Indio	cators Monitoring	En	gagement		
Eligibility Doornit	mont Soloction	Enrollment, and	Attend	ance (FRSFA)	
HS, EHS, or EHS-CCP	Program Delegate	Classroom Name	Sessio		
0			Sessio		Hover for Tips
HS, EHS, or EHS-CCP	Program Delegate	Classroom Name	Sessio	on	Hover for Tips



### State and Local Community Assessments

Purpose:

• Understand the Need and Gaps

Select Demographic Catego County Select Location(s) Indiana	2020 ELAC A Interactive Young Childre	Das	shbo	bard		5	Export Hover f	?
Every year the Indiana Early Le (ELAC) is tasked to assess the quality of early care and educa their findings, ELAC writes an A dashboard complements the 2 county level early care and edu	availability, affordability, and ation across the state. To share Annual Report. This interactive 020 Annual Report by providing	childr		d care l	f young because rking?	fam	it is the struc ily household en under 6 ye Married	ls wit
data in the charts to view data	e. Move your cursor (hover) over , notes, and sources.		64	4%		۸.	Couple	33%
Visit elacindiana.org to view other related resources.	the 2020 Annual Report and					TŦ	Parent	
How many young children are there in Indiana?							ethnicity r 6 years?	
Select an Age Gro	up to Filter the Map			ce	,	unue	Ethn	icity
Population Under 6 Years		82%						89
	Jnder 6 Years al: 504,278	- 0	14%	3%	1%		11%	
No items highlighted	21,08318,531 4,233 2,374	White	Black	Asian	American Indian		Hispanic	Non
highlighted No items highlight 34,800.1257,840 9112,322 820 1,489 9112,322 820 1,489 1,789 2,8712,217,9972,466 1,337 6,081 4,311 799 1,772		What is the make up of young children under 6 by federal poverty level? Which counties A highest percent young children I poverty? Counties Rank. Highest Percent Poverty Rank County					est percentag g children livi poverty? unties Ranked nest Percentag Poverty	ge of ing in by
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1,074	8,839 1,772	53%			7%	2	Perry	37%
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7,427,936	1,619		100-12			8	Owen	31%
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1,263 2,03 2,687 <sup>3,235</sup> 7	1,619 7,699 716 6,588 2,172 3,060 3,652 2,018 324 762 1,698 <sup>2</sup> ,173 817 1,405 2,009		125-18 185-20	5% FPL 0% FPL		9 10 11	Marion Miami	31% 31% 30% 30%
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1,263 2,03 2,687 <sup>3,235</sup> 7	1,619 7,699 716 6,588 2,172 3,060 3,652 2,018 324 762 1,698 <sup>2</sup> ,173 817 1,405 2,009 659 5,532 2,896		125-18 185-20	5% FPL 0% FPL		9 10 11 12 13 14 15	Marion Miami Delaware Vanderburgh Rush Jay Lake	31% 31% 30% 30% 30% 29%
1,263 2,03 2,687 <sup>3</sup> ,235 <sup>7</sup> 2,527 <sup>660</sup> 3,3	1,619 7,699 716 6,588 2,172 3,060 3,652 2,018 324 762 1,698 <sup>2</sup> ,173 817 1,405 2,009 659 5,532 2,896		125-18 185-20	5% FPL 0% FPL		9 10 11 12 13 14	Marion Miami Delaware Vanderburgh Rush Jay	31% 31% 30% 30% 30% 29%

### **Asset Mapping**

### Purpose:

Highlight available community resources

#### Wabash County Community Resources Map Presented by the Wabash County United Fund, Inc.

#### Introduction

The Wabash County United Fund created this resource map to help professionals, programs, and other partners identify resources available for support and collaboration, along with resources needed based on gaps in the community.

Individuals looking for specific assistance should call 211 to be quickly referred to the appropriate service.

For questions and comments related to this resource map, please contact Steve Johnson, 260-563-6726.

This resource map is focused around the United Fund's three categories of focus: Health, Education and Financial Stability. In total based around these categories of focus, there are currently 324 unique resources available for Wabash County residents.\*

Start Here Step 1. Select a Focus Area 175 Resources 110 105 Resources Resources inancial Stability Education

Step 2. Select a Secondary Category

Addiction Recovery 9 Resources

Adult Education 1 Resources

Alternative School 4 Resources

Child Protection 1 Resources

Children's Resources 8 Resources Clothing

College and Career 4 Resources

Committee

Community Development

Health



Here is a summary of each category of focus:

175 Resources The Health category includes a variety of resources to help individuals live a healthy life. These resources include areas from access to nutritious foods, substance abuse support, and quality health care.

#### Education

#### 110 Resources



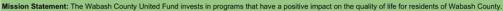
WHERE AN ANTIN

The Education category includes resources that are meant to help children and families from birth to career. These resources include areas around early childhood education, career training and employment assistance, along with community development education.

#### **Financial Stability**

#### 105 Resources

The Financial Stability category is meant to put children and families on the path to financial success and stability. These resources include areas related to billing and housing assistance, financial education and access to other financial resources.



Wabash County United Fund, INC. 73 W Canal Street | PO Box 2 | Wabash, IN 46992 info@wcunitedfund.org | 260-563-6726

Developed in Partnership with Transform Consulting Group

24 Resources

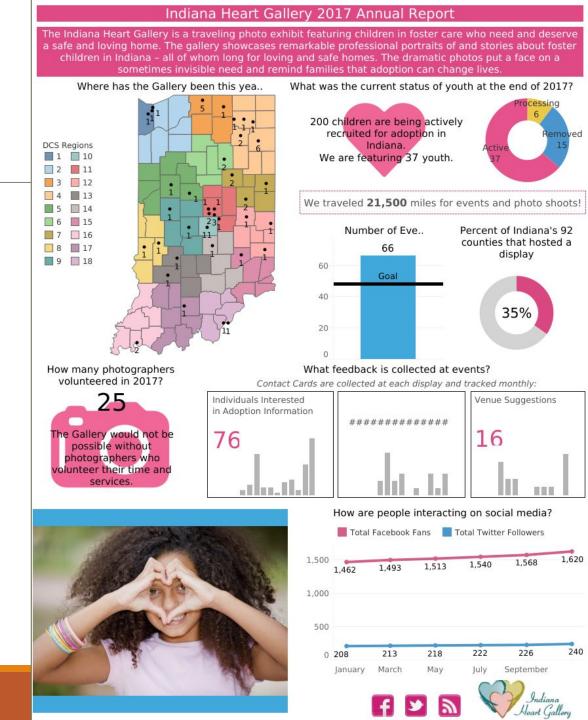
7 Resources

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### **Project Management**

Purpose:

- Track and monitor completion of project tasks
- Report out timely





# What would be your use case for a dashboard?

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PURPOSEAUDIENCEKEYDATAFEATURES & DECISION-QUESTIONSCOLLECTIONUTILIZATIONMAKING



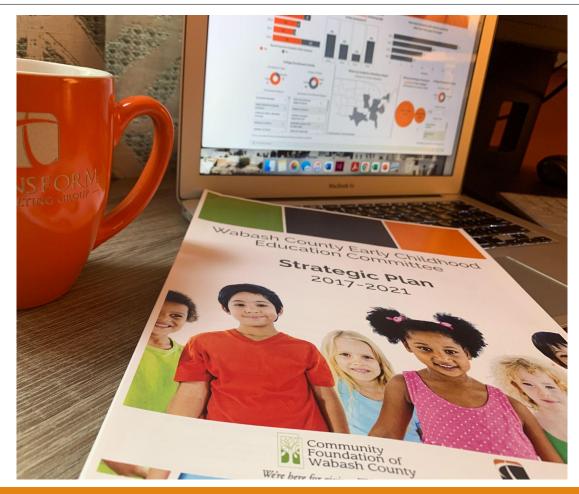
# 1. Determine the Purpose

- Goal
- Define Success
- Value

INNOVATION INTERESTSKILL FINANCE MARKETING NETWORK E SOLUTION SUPPORT BUSINESS DESIGNSERVICE TEAMWORK PARTNERSHIP RGE TECHNOLOGY VISION TIONPROMOTION



# 2. Clarify the Audience





## 3. Confirm Key Questions





## 4. Determine Data Collection

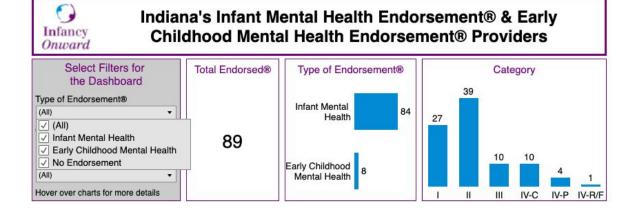




### 5. Identify Features and Utilization

### Interactive Features

- Filters
- Pop-up information boxes
- Multiple pages of data (tabs)



#### Pennsylvania Young Children and Early Head Start Profile





### 5. Identify Features and Utilization TRANSFORM



#### X Create post **Transform Consulting Group** O Public https://public.tableau.com/app/profile/transform.consulting.grou p/viz/PennslyvaniaEarlyHeadStartDashboard/EHSProfile • (...) Pennsylvania Young Children and Early Head Start Profile rly Head Start provides comprehensive services to low come pregnant women and young children ages 0-3. This ofile provides an overview of the vulnerable populations ross the state and how Early Head Start programs are eeting the needs of those populations wer over the con Unmet Need In Pennsylvania, Early Head Start served 12% of children ages 0-3 living in poverty /hy invest in Early Head Start? / Offers comprehensive services including health, mental health, nutrition and family support Free to families / Provides program options to meet the needs of families, home-based or center-based PUBLIC.TABLEAU.COM Pennslyvania Early Head Start Dashboard Pennslyvania Early Head Start Dashboard





### 5. Identify Features and Utilization





# 6. Confirm the Decision-Maker TRANSFORM



### Steps for Creating a Dashboard

# Check Out Our Cheat Sheet!

### Data Dashboard Development Process

At Transform Consulting Group, we work with various clients to create data dashboards. The following questions guide our dashboard creation.

1. Purpose	2. Audience
<ul> <li>What is the main goal of the dashboard?</li> <li>How will you know the dashboard is successful?</li> <li>How will this dashboard add value to the field you serve/ work within?</li> </ul>	<ul> <li>Who is the primary audience?</li> <li>Who is the secondary audience?</li> <li>How do you anticipate the audience will use the dashboard?</li> </ul>
3. Key Questions	4. Data Collection
<ul> <li>What questions need to be answered?</li> <li>What is the story you want to tell?</li> <li>What metrics need to be used and analyzed?</li> <li>What do you need to know?</li> </ul>	<ul> <li>What data are you already collecting?</li> <li>Of the data you collect, what do you want to highlight?</li> <li>What data (internal / external) are you already monitoring?</li> <li>What other data do you want to collect, and why?</li> </ul>
5. Features and Utilization	6. Decision-Making
<ul> <li>Do you have any data dashboard inspirations? Why do you like these dashboards? What features do you appreciate?</li> <li>How do you want to drill down your data? (County, race/ethnicity, economic status, etc.)</li> <li>How often do you want the dashboard to be updated? (Monthly, yearly, quarterly, etc.)</li> <li>How will the dashboard be shared? Will it be shared on your website?</li> <li>How will the dashboard be used internally and externally?</li> <li>Do you want the dashboard printer-friendly?</li> </ul>	<ul> <li>What is the decision-making process?</li> <li>Who has the final approval?</li> </ul>



317-324-4070 | 144 South Wabash Street | Wabash. IN 46992 Offices in Indiana and Michigan www.transformconsultinggroup.com

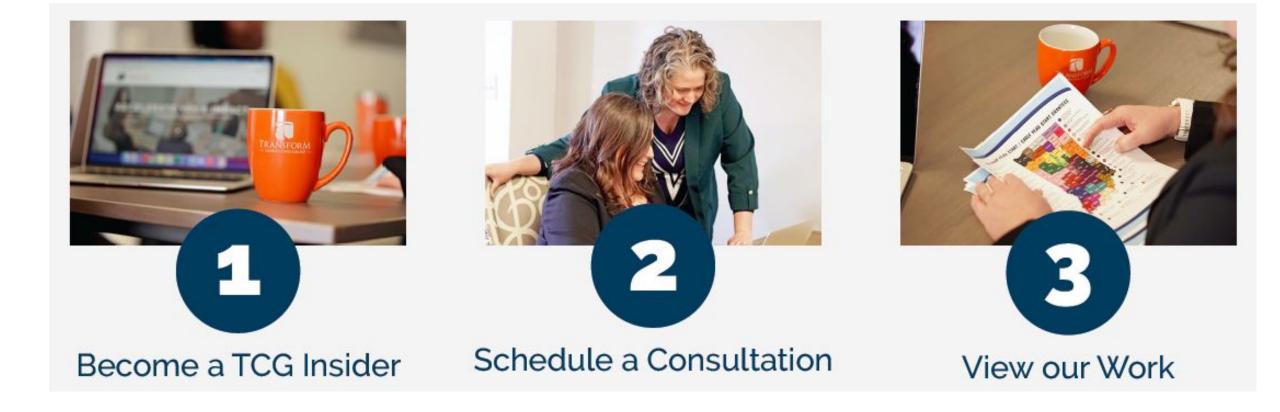
### How To Use A Dashboard



- 1. Use the data dashboard!
- 2. Train and prepare your staff
- 3. Integrate the dashboard within your work culture (Board and staff meetings, decision-making, presentations)
- 4. Improve the quality of your data and data systems



### What to do next?





# What's your next step for a data dashboard?

(i) Start presenting to display the poll results on this slide.



## Presenter Contacts

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### Amanda Lopez

President <u>a.lopez@transformconsultinggroup.com</u>

