NNIP Baltimore 2017

Plenary Session: A World of Dashboards

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**Peter**: We will be discussing dashboard, a topic fraught with controversy and passionate opinions! Topic of dashboards is obviously relevant to our work as NNIP partners. Don’t want to spend a lot of time defining, but think of a car dashboard that is giving you information in real time — warning light, speeding, etc. Information can be important. There is also a question about why are we creating these dashboards? is it because someone wants them?

**Bob**: So, someone just asked you for a dashboard… what now? Many of us have heard that question. Presentation should help prepare for how to answer.

First, important to recognize there are a lot of different dashboard. So, taxonomy of dashboards:

1. Performance management/ decision support dashboard: These are designed to manage performance, give immediate feedback. Example is a car dashboard. Updated in real time and provides data to support decisions. For example, our performance measurement systems has a separate dataset, can be tracked daily or weekly.
2. Collective impact dashboard: This is based on community process, track progress over time against community-defined baseline. Data updated slightly less frequently and always identified through community process.
3. Data Viewer: These are exploratory, no framing other than what data is included in that dashboard. People can see what’s happening (ex. property dashboard, SW Pennsylvania community profiles)

10 Qs to ask when someone asks for a dashboard:

1. What’s the goal or purpose of tool?

2. Will the dashboard be tied to a larger context, process or framework?

* It is important to understand the process and encourage client to view their dashboard as part of a larger process.

3. Who will use the tool?

* should put together personas, skills, data literacy, devices, biases to understand who is going to use it and what they will need to know and have at hand to use it successfully.

4. User center design; how do users currently make decisions or track progress?

* for example, without car dash, how do users understand they have a tire pressure problem?

5. Will users know what to do because of this information?

For example, how will police respond to data? be more present in certain areas?

6. What is the organization’s culture?

Will it make people look bad, must understand and ask questions about organization?

7. Where is the data going to come from and how often will it change?

* Who’s going decide what’s in and out? What do i know about the sources of data and the quality?

8. Is the information reliable and easy to interpret?

* how to deal with margins of errors? what’s the documentation? do you need to provide tips?

9. Is there some easier way to do this?

* Consider off the shop tech options such as tableau

10. How committed are you to maintaining the tool?

* Are you going to pay for my time to participate in community process? How to avoiding 404 page not found warning in future? Who is going to train users?

Have to follow these questions in order to approach and budget properly for a dashboard process.

**Sharon**:

Going to present on dashboards for decision support. Building off Bob’s presentation - that you know you want to build a dashboard, now what? Will talk about our approach to building dashboards and share some lessons.

Our approach has evolved, we have been developing data tools for 20 years, but when we started to apply community participation in tool development, that helped us hit the nail on the head.

Important to consider what is the specific decision making process that you intend to tie this dashboard to. Once that is decided we identify users around specific use case and once we identify stakeholders we build community advisory committee (one per each tool). The committee is responsible for designing the tool with us.

For engagement, we are reliant on community and residents to identify need and design solutions; doing this with community and not for them. We beta test dashboards through networks of advisory committee members. Committee is helpful in attempting to prioritize decisions and essential elements of this dashboard.

Development and feedback cycle - as you can see that the advisory committee is involved in almost every stage; use paper products for early design stage. In graphic design stage, we heavily engage AC. Color has connotation and advisory council is our first line of testers before sharing with more users. (see last year’s San Antonio IGNITE presentation for more detail)

3 examples

1. [indianaimpact.org](http://indianaimpact.org)

* Dashboard to support organizational decision making processes
* United Way of Indiana approached us to make a dashboard to link their 62 local united ways in Indiana
  + Purpose: is our work making a positive impact? what should our priorities be?
  + 2nd purpose: highlight data and community context relevant for other local nonprofits
* Then we thought how to tie to a framework; United Way has a national model and we could pull from that framework to determine what should be on dashboard
* This community was not yet measuring against targets; measuring against key questions: have we improved? who do we compare?
* Can drill down into those metrics and break down by school district

2. [IndyVitals.Org](http://indyvitals.org)

* overall community decision making process
* Plan 2020 is a city led process to improve city and celebrate bicentennial; wants a way to get everyone on same page and then target resources accordingly. City was interested in health and sustainability
* Adopted sustainability framework from STAR communities and then tweaked metrics to define at neighborhood level
* Use Cases: Persona
  + 3 different audiences: interested citizen (simple dashboard) - how neighborhood is doing how it compares; staff at an organization - want a deeper dive to understand disparities and inequities, look at trends; policymaker - understanding relationships between metrics how poverty relates to education
* Demo
  + For each neighborhood get a different screen and dashboard that presents metrics from STAR rating system.
  + This one wanted to include current numbers and how that is changed; how do we compare to other neighborhoods and communities
  + Can dive deeper can dig into trends, look into disparities by neighborhood but also by race, income, gender, etc.
  + Deeper dive lets you explore relationships; and spatial trends.

3. Collective Impact Initiative

* measuring progress against agreed upon set of goals
* education alliance; made trade to career collective impact initiative
* we invested a lot of time creating data to help inform their process
* now that we know what the goals are, let’s measure progress towards those goals

Lessons Learned

1. Manage expectations

* make sure people understand that change does take time
  + long term things that take a lot of energy and effort to change
  + understanding that the dashboard is not an end, it is the start of a conversation
  + The dashboard can point to what else you need to know - such as investment of more time and effort
  + I’d encourage everyone to make sure there is an appropriate level and buy in and support and someone who will maintain it moving forward
  + Data updates are important; all metrics on dashboard we make sure can update regularly at low cost

2. Communicate about data limitations

3. Technology

* tech changes so fast, so we’ve had to adapt our tech and approach so we are now using more agile approaches

4. after its built, now what

* Need capacity building: make sure stakeholders understand how to interpret the data and translate into decisions
* Must think about links to decisions and how dashboard influences how decisions are made

**Peter**: Before we turn over to the floor, a few questions. In examples, you show a lot of different data visualizations: do any of those work better than others? Are there things you've tried that didn't work at all?

**Sharon**: That’s where the interchange with our advisory committees has been really important. For example, some people like arrows and others don’t. It is about understanding audience, use case and testing use case.

**Bob**: Important to work with designers.

**Peter**: Sharon, do you know of any examples about making decisions or changing action based on release of dashboards?

**Sharon**: IndyVital is just starting to roll out. CDCs are using that to show that investment is happening evenly across city, even though the need is right here in their area. Use the data for grants and things like that.

**Sheila**: How have you navigated user registration? Is that helpful to know what users are using your tool or is that a barrier?

**Bob**: We thought about that and felt that it is too much of a barrier. Nice topic for another unconference, how to understand how people are using your tools?

**Sharon**: We used to have a registration and quickly got rid of it because it seemed like a barrier.

**Sarin**: What are the platforms that are more efficient than we are using right now? Is there a way to compile best platforms out there to have people write their experience using it? That way we don’t have to each go and try each one of them.

**Bob**: Some of that might be compiled already on the NNIP site. Have to understand capacity for developers for example.

**Peter**: Difficult in a constantly changing landscape.

**John Cruz**: what kind of stuff do you do in terms of marketing and outreach to get users?

**Sharon**: We have a couple of strategies. We have a community forum event 2 times a year, one was focused on rolling out this tool. We also partner with a PR firm that helps us reach to media. For Indyvital we got on the front page of the local newspaper. In order to do that you have to couple the data with a compelling story. Our advisory committee is also key. One of our members from CDC did a radio show, and all committee members also push it out to their partners.

**Bob**: Try everything and see what works. We pushed it out through list serves, connect with media, change around website, etc.

**Seema**: How to estimate a proportion of time in the development phase instead of production phase? Often funders are only considering the production. How to invest time and money in development? How do you talk about value that your team has added during the development phase itself?

**Sharon**: We have learned to build that into budget. Building buy-in and getting right questions is a large focus of our time. Managing expectations about the time it takes. We build it into our process.

**Bob**: It will differ based on type of dashboard; for example, collective impact may be different than performance measurement

**Peter**: Real world experiences, difficulties?

**Katie Pritchard:** Happy to share painful experience; how to work against a dashboard feeding into the oversimplification of the work we are doing? Particularly true of board members and business folks who are involved. Business sector traditionally into looking at 3 things that explain it all. We hit goal or didn’t; its good or its bad etc. What’s the context you provide to limit the oversimplification?

**Bob**: Not really sure.

**Peter**: Have to get underneath the dashboard, about what the process is going on behind the scenes. These high-level things are what we are monitoring,

**Laura**: I share your pain. We had a Mayor who was an ex-food service CEO. He wanted 6 quick wins to eliminate poverty. What can I give them that will satisfy their need for info, but keep them at arm’s length? Changing mindsets, and using data to help people understand that you need to look more into that problem. As data intermediaries, we have an enormous responsibility to steward data. It is in our hand what the data gets used for.

**Joe**: Wondering about the collective impact model. Is there strategic alignment among folks? There seems to be a link between community indicators and performance measures. Do performance measures reflect across all the contributors across the model or are they identified individually?

**Sharon**: Have to develop strategies that you are going to implement that will actually move the needle. Goals were determined before dashboard process. That one suffered because there wasn't a backbone institution in place to make sure that investment and resources continued. Essentially trying to understand whether each individual program is making progress towards goals. In our case, leaned on United Way as a leader to agree upon key measures in education. They want all the funding that they put into agencies aligning with that particular goal. Using data to ensure that initiatives that are happening under the umbrella under moving the needle on ECE, make sure each unit is pulling their part. At the program level, will you start to see the change first, takes lots of program level changes to make population level change.

**Louise, KCHA:** Best Starts for Kids, multi-million dollar, 6-year project. This year, we are tasked with doing data training for applicants. It was almost impossible to explain the dashboard (headline indicators (long term goals). None of the small groups funded are going to move the needle on that. Then there are secondary goals, and then there are individual indicators. The people who designed the dashboard designed it in backwards way; members of community have a hard time to access and interpret it. Very difficult to do data training when the product wasn't built very well.

**Peter**: You need to be able to show progress and can’t necessarily wait 10 years.

**Sharon**: In dashboards that we develop, we try to show change over a period of time. Year-over-year is not really relevant, can’t change things overnight.