Creating Dashboards for Grants Development and Management
May 18, 2017

Michael Lesiecki - Good day everyone I'm your host and presenter today Mike Lesiecki our topic is Creating Dashboards for Grants Development and Management in today's webinar May 18th 2017 thanks for joining today. Let's look a little bit about the system that we're using.

Webinar Details
Michael Lesiecki - The webinar details you'll be in listen-only mode using your computer or phone for your audio systems and please use that question window on the lower right of your screen yes the webinar is being recorded you automatically get a link to the recording. Thanks for joining today, brought to you by the Center's Collaborative for Technical Assistance with additional support from the ATE Collaborative Impact Project and funding from the National Science Foundation, thank you to those who support this project.

The CCTA is led by
Michael Lesiecki - What is this CCTA thing well it's the national tis led by five centers the first one as you see is the National Center for Convergence Technology; the South Carolina ATE Center; the Florida ATE Center; Bio-Link and our own Networks Resource Center here at the Maricopa Community College's, thank you centers for being part of this.

CCTA Purpose
Michael Lesiecki - What's the purpose of this CCTA well it was designed to provide technical assistance to grantees both from the labor side and the NSF side but more than that we invite participation from all of those that are interested in these topics workforce oriented programs in general so thank you for joining. Our deliverables are webinars like this one, identification of best practices which you can see as white papers on the website and we host convenings like the one at HI-TEC coming up this summer that you'll hear more about.

Poll #1: Your Affiliation
Michael Lesiecki - Now it's time for ask for me to ask you a question in a moment we're going to launch the first poll, I'm going to ask you if you could identify your affiliation so there's a poll on your screen would you please click on the radio buttons you'll indicate that you're involved with NSF, with labor, with both or neither. Yes I see all kinds of results streaming in, you probably know the answer to this one I'll give you just another moment five, four, three, two, one please type in those last answers. Let's take a look, I'm going to close the poll and then display the results. Now let's look at our results today pretty impressive we have people from all over but the largest almost the largest number have both NSF and TAACCCT grants isn't that interesting. So there's a spectrum that you see of people that are involved today, good let's close that poll and I have one more question for you just a moment.

Poll: How many people are listening with you?
Michael Lesiecki - Oops sorry we'd like to ask this question how many people are in the room with you so let me choose this poll, display the poll for you there it is this helps us look at the broadening of our impact often we will sit in the room together watch this webinar at lunchtime so thank you very much for just typing that in, we use this to demonstrate our impact to the NSF. I'm going to close it five, four, three, two, one closing the poll. Let's take a look at the results, well of course most of us are by

ourselves that's sort of the nature of things but 10, 5, 19 percent have more than one person with them in the room thanks very much for doing that, let's close that poll and move on.

About the Presenter
Michael Lesiecki – There he is about the presenter that's me on the right-hand side I'm Mike Lesiecki. A little bit about me I'm a PI of an NSF grant, I've reviewed for NIH and NSF grants, I have a technical background in chemical physics and lasers but I like to think about evaluation and impact as well so thanks very much for joining.

Also joining us Today
Michael Lesiecki - And now it's my pleasure to welcome my co-presenter Lara Smith, she's the Coordinator of Grants Development and Management at Gateway Community College. Hi Lara would you say hi to everybody.

Lara Smith - Hello everybody hope you enjoy the webinar today.

Michael Lesiecki -Good your audio sounds just great. Gateway has been very successful at grant's over the years and I think a lot of that has to do with you we're actually going to look at some dashboard data later on in the program so thank you Lara for joining us today.

Lara Smith - Thank you and thanks for the compliment.

Context
Michael Lesiecki - Ok so let's go ahead what's the context for today's thing, well even though we're focused on grant developers and resource development personnel it applies across a large spectrum and do you know that those sort of people like Lara their managers today and they get questions about evaluation, outcomes, evaluators, evidence, data management, it's more than just writing grants it has to do with all of these things.

Grant Coordinator Job Description
Michael Lesiecki - In fact I went online and found a job description for a Grant Coordinator, you can see the link to the community college there and what do they have to do they have to develop, implement, monitor and evaluate a grant management and reporting system this was one of the job duties for a Grant Coordinator that's a lot of work in addition to developing grants themselves.

Major Changes in Federal Grants Management 2017
Michael Lesiecki - So we're going to hopefully give some help there. Here's some more background and context, I was at a recent meeting talking about the major changes in federal grants management upcoming in here now in 2017 so it was me that highlighted number one and two there's a focus on outcomes, number two performance metrics man are they talking our language, sure there's other things like micro purchases who cares about those things no I'm joking about that. Our focus today is on number one and number two, if you want to learn more about this you can see the source there brewman.com and that's the legal firm that advises provides advice to a number of people in the United States about federal funding opportunities.

Your Knowledge and Skill
Michael Lesiecki - So your knowledge and skill is increasingly called upon in the grant management area, whether we're resource developers or PIs or project staff and I think the bullet number two if you setup

a viable process for your project whatever it is to begin tracking that success it's going to make a difference for you in many different ways which we'll discuss today.

Points of View
Michael Lesiecki - Again our point of view the Development Office, sponsored research officers, their teams and anyone working on a project of any sort can gain from knowledge about dashboards.

Today's Objectives
Michael Lesiecki – I know I'm going fast through this stuff but I want to get to the meat of the dashboard things and by the way you can always review this on a recording to. Here's what we're doing today; number one we're going to define dashboard elements, number two distinguish informational elements from the important KPIs the key performance indicators, look at the third bullet we want to create ownership because that dashboard if it's owned is going to give it a dynamism or a dynamic reporting tool and towards the end will develop we'll show you how you can develop your own dashboard with simple examples and this is the key thing we're going to get excited about publishing our dashboard on the web as a live interactive tool.

Elements
Michael Lesiecki - Let's talk about the first thing those dashboard elements I think of them in three ways a dashboard ought to have data and trends, metrics and measures and those important KPIs so as you think about a dashboard it's got those three elements.

Let's Get A Sense Of A Dashboard
Michael Lesiecki - Let's get a sense of what a dashboard looks like so I'm nosing around the web and I find Seattle Colleges data dashboard so it wouldn't surprise you that a college would have student profiles, enrollment, eLearning, diversity, student achievement metrics this is the headline of their dashboard and of course a link to see it.

Seattle Colleges Student Profile
Michael Lesiecki - Now if you looked a little bit further at their student profile it wouldn't surprise you to see data like this notice how they're using a very visual display of their fall student count, their full-time student percentages, their financial aid well this stuff comes streaming out of the institutional research departments and it's used to give information these are information and data elements pretty typical of a dashboard you can go right to the Seattle's homepage and see this stuff yourself.

Untitled Slide
Michael Lesiecki -Now let's look at something that's more about performance it's that same thing we looked at a moment ago but now I'm talking about completions, what does that mean?

Untitled Slide
Michael Lesiecki - Well if we look further into Seattle's dashboard under completions, you see how it's highlighted there in the upper right they're measuring their colleges it's a group of three colleges; central, north and south. The gray bar shows the state norms and notice on the first one at 40% or 44 they're actually doing a bit better than the state norms. Look how they are using the data visual display to show their progress against a benchmark these are important performance indicators for Seattle. Turn your eyes towards the bottom transfers who earned a degree, professional-technical completions so you can really get some important information at a glance, you're looking at performance and data

that's the advantage of dashboards for many of you I'm not telling you something new I'm just reinforcing the value here.

Dashboard Elements
Michael Lesiecki - Back to the dashboard elements remember there's three of them, data and trends, metrics and measures and what's the third one yes everyone shouts out key performance indicators so as you look at this further let's look at some examples of data and trends, these aren't necessarily going to be the ones you use I just want to use them as illustrative elements.

Dashboard – Data and Trends
Michael Lesiecki - So data and trends could be, what sort of awards are being made by the colleges or being certificates of completion or degree completion, what's the trends and occupational programs over time, what are those trends look like so that could be typical sort of things that we're looking at.

Dashboard – You Are Creating An Outline
Michael Lesiecki - Now notice I've underlining the words at the top of the frame you're creating an outline. I want to put in your mind as you think about a dashboard be like writing a term paper right you start with an outline of the key things that you want to have and what your subsections are going to be your three things are data and trends, metrics and measures and KPIs so I'm just trying to reinforce that.

Now Set Your Links
Michael Lesiecki - So now occupational programs, I'm now going to actually start creating my dashboard I'm going to create a link between the other part of my Excel spreadsheet which has information about occupational programs.

Dashboard- Setup in Excel
Michael Lesiecki - I'm in Excel all of us use Excel to some level I'm not very good I have to tell you the truth or else you can find somebody that can help you but look at the look at the dashboard trends on the right there's trends, data elements right number three occupational programs yours an award and I've got it linked to a sheet at the bottom of the page all of us are pretty familiar with you know these worksheets and stuff and Excel I want to go through this in detail as if I'm giving you a tutorial in Excel but there will be a little bit of detail here.

Now "Present" Your Information
Michael Lesiecki - So now I've got my dashboard information set up I want to show it to somebody.

When You Click On The Data Or Trend Element It Is "Presented"
Michael Lesiecki - Excel has this little thing of linking to it of linking the worksheet in here so I click on that data here it is occupational elements there it's all presented ready to go.

Review
Michael Lesiecki - And now we're ready to review the dashboard, I'm knowing going quickly through this one I'm trying to give you a sense that it's pretty easy manipulation in Excel so what do we do we set up data and trends we used Excel, we outlined our dashboard, use the sheet for every dashboard element.

Link Each Element To Its Sheet
Michael Lesiecki - Each of those elements has its own little sheet and now the key thing is we linked from our dashboard right to that sheet. Not going to you know I'm going to talk about this a lot but you can use the Edit hyperlink command pretty easy to figure out even I can do it.

Anchor The Sheet To Its Element
Michael Lesiecki - We anchor it and that's the final step in creating your dashboard notice I'm going through creating a dashboard in a matter of minutes here so it's not a tough thing to do it's a few little details but you can do it.

You Are Now Ready to Show Your Dashboard
Michael Lesiecki - Your dashboard is ready to go, you've got it set up, you've outlined it, you've created your worksheets, you linked them, ready to show. So your boss comes in and you say, "hey let me show you this dashboard," open up your Excel and click on it.

Your Dashboard Is Ready – Clicking On An Element Presents The Information
Michael Lesiecki - Click on that occupational program activity trend, click there it is.

Results Of Clicking On 5-Year Trend
Michael Lesiecki - So that's the results of clicking on the trend you can see the academic years, a number of programs going on to moratorium whatever you have got to show. So in just a matter of a few minutes we work quickly here but we've come pretty fast to actually getting towards what dashboards mean and how to think about them.

What are the most important trends and data that you track in your grants office?
Michael Lesiecki - Now Laura, let me turn toward you, your Grants Development Officer, what are the sort of things that you track, data trends what are you doing in your Grant's office?

Lara Smith – Well, I thought the webinar was over because you already showed us how to use a dashboard so obviously you're done, and we could go away.

Michael Lesiecki - We can head off to lunch, I know it's faster. Yeah ok yeah so what do you do over there?

Lara Smith – Well ok, you know I think that there's interesting information that we should keep track of when we're looking at different types of opportunities you know for community colleges in particular there's opportunities where community colleges are eligible to apply but if you dig a little deeper you see that they are awarding to four-year colleges and universities as opposed to community colleges so that's something that I'd like to know going into a grant opportunity is does this funder really fund community colleges and what percentage of awards go to community colleges instead of universities. So that's something that is easy for us to see if we put it in a dashboard we can help to identify the types of agencies that are truly interested at actively funding community colleges over universities which increases our likelihood of being funded. Another thing, go ahead.

Michael Lesiecki - I guess trends change over time so you probably measure that over time.

Lara Smith - Yes I would say another thing that changes over time is what particular interests are of funders you know a few years ago STEM was the big push as it still is but then we heard arts being

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introduced into STEM and then STEAM was the buzzword. Now still large focus on IT and cybersecurity so I think gauging the interest of the funders and the ways those trend is important as well. So if we can also check by agency to see you know what are their top interests.

Michael Lesiecki - Sure that makes sense.

Lara Smith – Then we know what agency to go to, for what type of program. Another thing that's fairly new over the last couple years in the grant's world is competitive preference priorities and those are kind of like the extra credit points you can get in a proposal more agencies are adopting those and if we look at them closely we can see trends in what their interests are for us to address those points. One of the things we see more in grant development is evidence of effectiveness or evidence-based strategies and so that's something else that we might want to keep an eye on to see what type of agencies are focused on those different types of competitive preference priorities.

Michael Lesiecki - Sure make sense.

Lara Smith – Yeah.

Michael Lesiecki - Cool those are good examples I think of trends somebody like you in your position would track and for example for me you know I'm in this advanced manufacturing thing we'll look at trends and like for example in automation how that's changing the way things are done, we might use that information as we go into a proposal development and use that in our needs section so we it's actually a good idea to put that stuff on our dashboard because it's right there we're ready to grab it.

Lara Smith – Yeah, labor market needs are very important and that's something that is definitely going to change over time.

Michael Lesiecki - I think the point Lara is that you can use this section of the dashboard to put what's relevant to you; it's like a resource that's right there at your disposal. You know what I'm going to go ahead into our presentation and talk a bit more about dashboards.

Elements: Distinguishing
Michael Lesiecki -Oops excuse me went too fast. So we just finished talking about data and trends folks let's think about metrics and measures what does it mean, what do we mean when we say that, what does that mean for a dashboard?

Dashboard – Metrics and Measures
Michael Lesiecki - Well I've sort of bolded some examples of metrics and measurements here, Google Analytics it's a simple one, Information Request these are two simple things, let's see how they would play out.

"Analytics" As A Measure
Michael Lesiecki - Well analytics could be a measure you know analytics aren't hard to get they could give you a sense of the interest in particular the change in interest of your web elements over time, give you a sense of you're getting new people coming in versus other people who are referring to all that sort of stuff analytics would be considered a measure. Here I've simply grabbed a screenshot from my analytics dashboard and I've pasted that into my excel sheet, so now it becomes part of my dashboard.

Dashboard – Metrics and Measurements
Michael Lesiecki - What about Information Requests.

"Requests" For Information As A Measure
Michael Lesiecki - Well I took this information actually working with colleagues here at the Maricopa Community College's and if you look at the questions they get the requests turn your eye to the left hand side occupational data, industry data, college related data like programs and other things they track this you can see there are numbers and their percents. And the title of this graph is *Response to Colleges and Stakeholders Requests for Information* so at a glance using a pie chart like this a digital display I have a good friend who doesn't like pie charts I won't mention her name but anyhow it's not you Lara it's somebody else, the but I think there can be reasons that you use pie charts. This one tells you immediately the mix of requests and the volume of requests notice it's not just the percents but the N as well to show you volumes so this is the sort of metrics and measures that you might want to include. A grants office often will get requests for information you might consider tracking.

You Can Get These Measures by Conducting Your Own Surveys
Michael Lesiecki - Something like that or you could use this as a metric here's one you get by yourself by conducting your own survey so let's send out a survey to everybody in our districts or your districts and it says would you recommend the Office of Sponsored Research whatever you call your grants office sometimes it's Office of Sponsored Programs sometimes it's simply the Grant's office would you recommend their resources and services to others. So we sent this out and we got 57 strongly recommended, 32 recommends, 7 neutral and 4 won't, we ignore those no I'm just kidding, we do look at these ratios this is the recommender score so we can track these things over time and get an idea of responsiveness so think about that not only are you getting data from other people but you can generate your own data through your surveys, that was my big point there.

Do you track requests for assistance?
Michael Lesiecki - Lara do you do that do you must get a zillion requests for assistance, do you track stuff like that?

Lara Smith - We do I think another data point that is maybe more valuable is an another poll question to ask is how intimidated are you by the grant process or how interested are you, how comfortable do you feel in applying for proposals because that's one thing we come up against is that faculty, administrators, staff they would love proposal dollars, they would love grant funding but they often think that the process is too daunting and that they're in it alone and that it's going to increase their workload and so I think it would be good to ask them you know how open they are to it or how interested and then on the other side of that track you know we try to increase the amount of proposals we submit, the amount of dollars that we get but also participation among individual faculty, staff, divisions or programs so that's something that I would look at.

Michael Lesiecki - That's good if you track that stuff then they can show sort of I don't mean just mean your activities but show your responsiveness right I mean that's one of your tasks it must be responding to people that you work with, so that's an important thing.

Lara Smith – Yes, and also in growing and enhancing and improving the culture of grants across the college, so by getting more people interested and involved I think shows success with a grants office.

Michael Lesiecki - I think that's an important thing, we work with as you do with faculty who are new to grants and at first they think gee I should write a grant to do this and I think encouraging them but showing them the depth of the effort needed to do that I think that's a viable thing that grants offices do they're always bringing new people in to that process, keeping it live you know what I mean.

Lara Smith – Yes.

Michael Lesiecki - Yeah all right good let me turn after that discussion.

Questions?
Michael Lesiecki - Let's see what questions we have from the audience. We talked about this is Mr. Thoughtful we refer to this guy as Mr. Thoughtful so he's thinking about questions, I have one that came in by email do you have anything there from your side?

Lara Smith - I do not yet looks like people may be typing them in.

Michael Lesiecki - Okay good, thanks so please folks use the question window to type in questions that you have. I have a question that has to do that came in by email it says can you use data from your institutional research department, how responsive are they? Lara when you ask your institutional research department for data requests do you get a response or do they tell you to go in line and they'll get to it when they can, I mean how does it work?

Lara Smith - Well I am very fortunate my Grants Department and the Institutional Research Department both report to the Director of Institutional Effectiveness so while we're a little bit different we have the same reporting structure and so they are very responsive to my needs but they also it's interesting they also use dashboards to publish college data and keep that available internal on our internal website so that people can go there and get information as they need it however for special requests they are very responsive.

Michael Lesiecki – Interesting, thank you. There's another email question that I'll bring forward it says are there specific software's that are used for dashboard you mentioned Excel but are there other things? The answer is yes and I intend to talk about those as we go into the second part of the thing so that's a good question. I want to give you the sense that dashboards are not something to be intimidated by or you figure that you got to contract with somebody or hire you know a software person or get some fancy license you can do them in very thoughtful ways the hard part isn't creating the dashboard itself is it Lara it's thinking about what the elements are and how they're interconnected I think that's the hard part.

Lara Smith - That's true and also we need to remember that quantitative data doesn't always tell the story, so if there are several influencers or variables or details behind the percentages that we may show we want to make sure that people understand that.

Michael Lesiecki -Good point, let me address one more question that's come into the question window, I showed some data there where we had a negative response that is four percent of the people would not recommend the services and there was a good question how do you close the loop on that negative response? It's challenging you know Lara because we make that an anonymous survey, we want people to feel that they can say anything in those surveys so the best way we can do that is not from that survey itself but to use other mechanisms for example we might set up a phone interview we'll choose

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an arbitrary subset of those responders and just do a phone interview and ask them to give some comments I think that's the best way of teasing that out I don't think there's anything you can do to directly close that loop on a negative response. I think if you're aware of it though you can make sure that you're doing everything you can to address issues that might come up I know that's sort of a hand waving answer Lara but I don't think there's a really good way especially since we do this with an amenity.

Lara Smith - Sure I would also suggest maybe listing different components of dealing with a Grant's office or with a grant staff asking the same group to rate those on a Likert scale and then adding some open-ended text boxes where they can give specific examples of challenges that they've had maybe you'll solicit more info that way and it can still remain anonymous.

Michael Lesiecki - Cool good point, you know what in the interest of time let's go ahead there's a few other questions but let's save them for the next question period as we get to them alright next.

Key Performance Indicators (KPIs)
Michael Lesiecki - We're going to switch now to that third element of dashboards called key performance indicators remember there's only three there's data and trends, metric and measures and now KPIs. Whereas you've got a lot of flexibility as the slide says here with those first two items you can make them as big or smaller as many or as few, KPIs you have to think of is much more limited they're limited number and they are ultra-specific so you're going to have a few KPIs and they're going to mean a lot. Now how do we know when we reach a goal?

If Only We Had Something Like This
Michael Lesiecki - Lara I've got an idea for a new product I want to develop this Nike like fit band and it tells me that I've achieved the goal in my grant project, it lights up do you think I could sell these if I could do that?

Lara Smith - I think if you added a speaker and a feature that gave you a round of applause when you make your goal that might help.

Michael Lesiecki - Oh okay, folks this is a joke slide it didn't actually mean that I'm working with Nike on the fit band goal monitor any how sorry.

Poll #3
Michael Lesiecki - Oh time for a poll as we get into KPIs I want to ask you a question, I haven't launched the poll yet so I want you to think a bit here what do you think is the better of these key performance indicators let's say we're in the grant's world would we measure a funding rate that's the percent of submitted or a number of competitive proposals submitted hmm got to put on my thinking cap here let's go ahead and launch this poll and see what you think so there it is folks what's the in your opinion now what's the best KPI funding rate or number of competitive proposals submitted people are somehow people are thinking about these things, why are you saying oh no what's your problem?

Lara Smith – Well, because I'm going to disagree with the majority of the audience I'm going to assume that the more majority.

Michael Lesiecki – We haven't seen the results yet, only if you see the results from then we can then we give them a countdown then we can talk about this, I know you've got feelings about this.

Lara Smith - I do.

Michael Lesiecki - Okay here we go folks five, four, three, two, one we've made our choices, closing the poll and now let's take a look at those results. Okay there they are Lara, 56% say funding rate is the better of these KPIs, what do you think, what's your thinking?

Lara Smith - Well I'm not just going for job security here but there's so many factors that affect a funding rate I think I personally and this is me as being in the Grant's office think that the number of competitive proposals submitted is a much better indicator there's just so many things outside your control when it comes to the funding rate for example I had submitted a proposal to a project a couple years ago and there was a hundred points possible as I mentioned those competitive preference priorities give you extra credit points, I believe we ended up getting 103. 5 points out of 100 plus I believe six extra credit points and we still were not funded um so I think that means that we submitted a highly competitive proposal um and we should get credit for that but the fact that we were not funded just had to do with the amount of proposals that came in, the amount of funds that they had, there was actually a tiebreaker um that came down to something silly like the amount spent on our library um that is out of our control and we didn't get funded. So I would go with the second.

Michael Lesiecki – No sour grapes there at all I can tell.

Lara Smith – (laughing) I just don't think it's so black and white.

Michael Lesiecki - It's such an interesting such an interesting discussion you know here I am the President let's suppose I'm the President of Gateway Community College I would sort of be interested in the funding rate is it would give me an idea that we're doing pretty good but I guess I'd also want to know B as well I think this is an interesting discussion. Lara I'm going to ask them one more question, I'm going to close this poll.

Poll #4
Michael Lesiecki - And then we got another one, I love doing these polls so same question choose the best KPI total dollars awarded per year, number of grant training sessions conducted this one might be a little bit easier let's go ahead and launch this poll just a minute here I figure out which button to do this, there we go okay so now the polls up and it says what's the best KPI in your opinion total dollars awarded per year or the number of grant training sessions conducted enlarge, suppose both you and I will be commenting here in a moment, let's give people a chance to put it in, sometimes if they're in a group they'll talk for a moment before they make their decision or somebody just grabs the mouse and clicks the button that's what usually happens. Okay so folks let's not stress on this too much just give them your best thoughts, a bunch of people have responded here. Lara I'm going to close the poll in five, four, three, two, one closed and let's take a look at the results. Well not too surprised 64% think the dollars awarded per year is good but a fairly large number was a little more than a third number of grant training sessions, what's your take on that?

Lara Smith - Well I think money is very important and I think in this case even though it's out of your control out of my control I should say I do agree that the total dollar amount funded per year is the more valuable KPI here. We have a target dollar amount that we go after and if that means we submit ten proposals to get it you know or we submit two proposals to get it there is an expectation that we are going to hit that dollar amount.

Michael Lesiecki – Yeah.

Lara Smith - As for the grant training sessions you know like as I mentioned before it's great to increase interest and participation throughout the college in grants and strengthen that culture of grants but I think that my President would be much happier if I brought in ten million dollars compared to producing twenty training sessions.

Michael Lesiecki - Yeah well you mentioned that culture does you just set of engaging more people in the grants and you would do that partly. I guess the answer is of course both but I think in this case I would agree with the majority of the audience that in some levels you got to look at that okay cool fun to talk about these things I'm going to close that on going to the next slide and let's take a look and see where we are now.

Dashboard - KPIs
Michael Lesiecki - So again we're focused on those KPIs right remember how many times more times you're going to say this Mike three dashboard elements data and trends, metrics and measures and then KPIs that's a dashboard.

Do you have Key Performance Indicators?
Michael Lesiecki - Let's look a little bit more at these excuse me key performance indicators, Lara we just talked about these polls do you what are your key performance indicators, do you officially have them?

Lara Smith - We do um for the Grant's office we definitely do look at the total dollar amount, we have a target and we look at the number of competitive proposals as you talked about before and also the participation so we're looking for an increase among individual participants in the grant's training sessions and grants process also grants an increase in grants spread across different divisions of the college. Um and I know we're talking about grants development but also in grant implementation there's common key performance indicators that will have to be reported on throughout a grant and as we're developing a grant we work with our IR office to identify our baseline and target metrics for that, so related to student success we often deal with enrollment, persistence, retention, completion and even though as I said that is measured in the grant implementation phase we have to look at that and gather that baseline data and establish those targets during the grant development phase.

Michael Lesiecki - That's an important point, I've got a great comment that came in via a question window and I totally believe this it says KPI should be related to in individual institutions objectives, I totally agree with that and we're going to reinforce that as we come forward here. I think you mentioned having targets that's an important point of a key performance indicator targets as well. We'll try to reinforce that as we go forward so folks thanks for those comments.

Dashboard – KPIs: Examples
Michael Lesiecki - Let's look at two just to illustrate about this thing we're going to beat the KPIs to death here I'm just throwing these two down funding rate and here's another one to consider nursing program outcomes I'm trying to give you multiple examples of KPIs.

Nursing KPIs
Michael Lesiecki - Let's look at those nursing KPIs there they are there's four of them the percent of alumni employed that sounds like a good, one number of graduates that's an important one for a

program, the third one that's the national exam for registered nurses boy look at those pass rates wow and the graduation rate, those are the four KPIs for that nursing program here in the district and I think they're good ones, they're meaningful, they're aligned to the objectives of the program so as you see there's not a lot of these things here but they're specific and that's the distinction for KPIs.

KPIs Distinguished By Direct Link to Big Goals
Michael Lesiecki - Let's look at another example this relates to the comment that came in the chat I think you would recognize a KPI Lara if you could recognize it's link to big goals I think that's one of the keys. Alright look at that big goal, see what it says number of occupational program computer completers excuse me can't even read my own stuff passing a license exam or earning an industry-recognized credential that's the big goal we want to increase that number and those four KPIs are going to tell you that, won't they.

Lara Smith - Yeah and there's a comment of the in the question box that the key performance indicator should be related to an individual institutions objectives and for us, right we connect them to our strategic planning and to our governing board metrics.

Michael Lesiecki - Oh yeah cool, good point so to me remember we've tried it as we've gone through this distinction between just data and trends and then metrics and measures and now KPIs and again that distinguisher for us we're drumming, getting this drummed into our head is the link to the big goals.

Make Your Dashboard Real And Evergreen
Michael Lesiecki - Here's a comment and a pretty picture, make your dashboard real and evergreen, so what does that mean? Well real I mean it in a funny way because sometimes you can show people a dashboard and they say oh yeah that's fine, but if you assign a dashboard element to them like a member of your project team or something they're suddenly owning that data point and they want to keep it up to date, they want to show you, they want to tell you about it so I'm going to reinforce this again.

Lara Smith - And if it doesn't look great, they want to find a reason to explain why it's not positive right?

Michael Lesiecki – No, I think you're right anyhow in addition to that ownership thing dashboards are nothing if they don't live if they're not live in a sense of having some sort of mechanism while you're routinely or periodically update their data so that's sort of an obvious one but I've been with organizations we did a dashboard it sat on the shelf for eighteen months before somebody looked at again I felt sort of bad but well you know.

Look at Column C
Michael Lesiecki - Let's go ahead and talk about this a little bit more look at column C, who are provided by I've got initials of people there if you look at number 19 there's my initials down there, oh I also got number 14 anyhow so as we would go into staff meetings we would pull up this dashboard on the screen and we'd say okay ML, let's talk about number 14 and I would click on it and we would talk about it, it was a good way of developing ownership. It's not a bad thing.

Let's Look At Very Active Community College's Development Office: Annual Activity Report
Michael Lesiecki - Let's take a look now at what a real not real I mean a very active community colleges development office at Sinclair Community College's many of you know Sinclair in Ohio, here's their

annual activity report so I just went right into it it's online and I looked at some of their performance and indicators and things like this.

Summary
Michael Lesiecki - None of this would surprise you, look at the upper left proposals; number funded, pending, not funded, pre proposals and not too many people do pre proposals anymore reports that's good. Storyboarding, Lara do you use storyboarding when you're doing development?

Lara Smith - At times I have before yes.

Michael Lesiecki - Okay presentation so you can see the sort of things they track but there's their big ones down on the bottom total projects funded, total funding and success rate holy cow 72 plus percent that's a good number so you can see what they're tracking and this came right out of their reporting structure. Just give you a sense of what others are looking at.

Hillsborough CC Activity
Michael Lesiecki - What about our colleagues, at Hillsborough Community College down in Florida we have some good friends down there I went on to page 19 of their grants activity report and this is what I found. They track the annual grant revenue year-over-year there it is grant revenues so it's important they believe in things like this and they decorate their report with nice images. So that's cool just to give you a sense of some of the things that they're looking at.

What A Development Office Dashboard Might Look Like
Michael Lesiecki - All right now let's think about a development dashboard what might it look like, well of course it wouldn't surprise you that has three categories we all know them now and we could start with stuff like this maybe under data and trends you mentioned a trend Lara we might be able to track trends in private foundations maybe more focus on community colleges maybe more focus on STEAM you mentioned that those would be the trends. Metrics, this easy one number of grants submitted that might be something we track and key performance indicators funding rate. Okay, so that makes sense we might want to track things like this we can already start developing our own development dashboards.

What Matters To A Development Office – What is Dashboardable?
Michael Lesiecki - So now I get to ask you a couple questions, these are mostly thinking questions what is dashboardable, I made up that term myself Lara. Dashboardable guess it's not too hard the I'd like to ask whether you think the funding rate versus the target excuse me total funding versus target or funding rate do you think of that as a data, a metric or a KPI so we're thinking, thinking, thinking, I'm going to change the slide and tell you what I think.

What Matters To A Development Office – What is Dashboardable?
Michael Lesiecki - I think both of these are KPIs, funding dollars versus funding target, and funding rate I'm pretty sure we would all agree those are pretty good key performance indicators.

More – What Is Dashboardable?
Michael Lesiecki - But what if I asked you grant performance, grant monitoring data, metric or KPI what would you say here.

More – What Is Dashboardable?

Michael Lesiecki -Well pretty much I think that we would measure in some way grant performance and if we were monitoring a grants compliance to let's say purchasing requisition things we might be able to think that as a metric I'm just giving you ideas letting you think about dashboards.

More – What Is Dashboardable?

Michael Lesiecki - What about grants information number of grants at risk, I betcha a Grants Development Office might actually have some of these things, grants under IRB monitoring, what would we consider these things to be?

More – What Is Dashboardable?

Michael Lesiecki - Yeah I agree, measures or metrics that make sense number of grants at risk, grants under IRB monitoring see in your mind you're thinking yeah we could do this we could measure we could track things like this.

More – What Is Dashboardable?

Michael Lesiecki - Relationships with grant project managers, number of grant seeking activities I'm feeling less certain here.

More – What Is Dashboardable?

Michael Lesiecki - Lara I've got a question mark here how the world what I track relationships with grant project managers? Well how would I do that?

Lara Smith - Well I would ask the value, how much they value that, how much assistance you know that divides them how much support.

Michael Lesiecki - Yeah okay cool.

More – What Is Dashboardable?

Michael Lesiecki - Again we're doing this a thinking exercise not to make this big, budget development and research requests well everybody would agree those are sort of metrics here good.

More in KPIs

Michael Lesiecki - Throwing some ideas at you doing these visuals I took some data I made up the data a little bit about grant funding key performance indicators I didn't really do it because it was data I used for our own organization here within the district. What was our the return from our community college district on their investment in us what was the percent of target, we had a good year that year we got very close to 100% of return funding received versus target we're actually ahead of the curve. Quality of proposals based on reviews we looked at the scores the excellence, the very goods and we made a judgment call on quality we felt we could do better but we also felt we were doing pretty good with it so we gave ourselves a 90 percent score there. This is something we tracked and we tracked it over time so that's what we looked at as a visual display for our dashboard.

KPIs – The Hard Questions

Michael Lesiecki - Here's some hard questions, well some easy ones too. Number of grants and the funding rate that's easy, we can do that. Are the grants develop sufficiently aligned to the mission of the college or institution, notice I said sufficiently aligned hmm some judgment calls there and then you

mentioned this Lara development of a culture of grant seeking at your institution I think that's harder to put on a dashboard but I think there could be some advantages of doing it as well.

Could we move this to the web?
Michael Lesiecki - Right folks were coming into the last and really fun section of this, could we move this to the web here's another mister thinking he's thinking I used to look like that when I was younger Lara that could have been me well idea let's not go there. Could we move this to the web?

Yes
Michael Lesiecki - The answer is yes, now some of you are aware of there's two important platforms out there I bet you there's more one is called Microsoft Business Intelligence I'm going to read what it says here business intelligence is a cloud service that provides non-technical business users; that's me; with tools for aggregating; I like that; analyzing; even better; visualizing; I like it even more; and sharing data holy cow those four things I would like that. And many of you know the software Tableau it's similar and very way so your institution could be a Windows place or a Microsoft place or maybe use Tableau. So what does it mean and maybe you've had no exposure yet I would say over the past three years these things have come on and they've come on fasts and business have adopted them very strongly there's a lot of business applications for these things and educational institutions are now turning to them as viable in the cloud approaches.

In The Cloud
Michael Lesiecki - So how does it work, it's actually relatively straightforward you establish your data in Excel or comma delimited file if you like but get your data in there, number two identify the relationships you wish to display what versus what, what trends are you measuring see this is where you get this is where you earn your salary right you understand those relationships and then in the software you select just click on it the visualization that you like and making this sound a little bit excuse me easier than it actually is but I'll elaborate on that in a moment.

Untitled Slide
Michael Lesiecki - So look I'm selecting my visualizations this is right out of Microsoft Business Intelligence, I could select those bar charts, the gauge charts on the lower left with the target, waterfall charts are fun or Maps, hold on just a second, thank you I'm back, so that's the step and this these platforms give you a lot of things you don't have to create these charts they do it for you so that sort of fun, but of course that's not the hard part.

An Example: Interactive Grants Development Dashboard
Michael Lesiecki - It's trying to make sure we understand what the things do. Let's look at a real example we're going live onto the web I have colleagues here at my college and they were very kind to offer me some very preliminary data they wanted to make sure that everyone knew that this is sample data only so please don't hold them to anything, we agree. So as we develop this dashboard they said let's take a look at grants awarded by funding agency, awarded by strategic initiative that's a good one isn't it Lara there's that alignment to go ring bells and grants awarded by college, we're multi college districts so that would be important thing for us measure. We're going to go live now I'm going to click on this link (insert link) and we're going to go to the web and this better work, there we go I just clicked on it, oh my God it looks like it's working, I'm looking at my test machine there it is on the screen has popped up for me.

Website

Michael Lesiecki - I'm actually in the cloud we're doing this live right now, turn your eyes to the top screen Lara, says total by funding source, look at that Department of Education well that's our clearly our dominant funding source now let me amaze you folks online when I move my mouse onto that bar and I'm going to right-click it and it says this is a little hard for you to say it says see records click there's the data behind all of this isn't that amazing the in one click I'm looking at all the data that's feeding into these bars here. Our people are amazed on this online I can just hear their breath being in taken. Turn your eyes folks up to the total amount funded by strategic commitment the types a little bit low here but that big bar at nineteen point eight million is build a thriving community through access and student success, so we've aligned our grant proposals are reporting to the strategic initiatives I really like this and now with a little drumroll, I'm going to turn down to the lower left of the screen look at that College Gateway Community College Lara thanks to you and your colleagues good strong success there and total amount funded by colleges and as you know the changes over year to year you don't always control it. I'm going to do one more thing as we were talking about this our colleagues in grants said, "hey could we see the number of proposals that constituted these awards," so yes we said yes we always say yes page two and now look at the data on the right you can see that there were 13 of those National Science Foundation proposals, 13 to the Department of Ed, 27 on the upper left so in case you wanted that you could fiddle with the data here. I'm stunned, we're amazed that you can do this it takes some time it took us about an hour to rough this out and about two and a half man days, person days to actually make this happen so just to give you a sense of how this works let's go back, how do I get back when am I here alright I hope I do this correctly here we go.

Lara Smith -Try again.

Where Do You Add Value?

Michael Lesiecki - Okay I'll try again, let's see there were back, okay thank you Lara sorry for the operator error. We're excited about the ability to do this online and I know you online are excited as well. Where do you add value as we get towards the end of this program as a person where you add value? Well I took this quote from Uri Treisman, many of you have heard him at some level, "resists the trap to chase grants for the allure of their money value - avoid negative entrepreneurship" I think all of us would nod our heads here may be dashboards help us as we track those things and number two you can add real value by helping ensure alignment to goals. How do you dashboard that well we saw it in a simple way, we chose the major strategic goals and we recreated an alignment to them on the dashboard, cool.

Difficulties: The Dark Side of Dashboards

Michael Lesiecki - The dark side of dashboards, it's important that you use the right data, it's important you avoid the wrong data because once it's up there this is where your job description comes in making sure you're looking at the right data so be careful there, too much extraneous information people get carried away and start throwing everything up on the dashboard bullets set 3 says if you can't really use a dashboard item then drop it and I think that's true. And then keeping it, keeping it evergreen.

Be Visual With Your "Presentation"

Michael Lesiecki - And here's another comment be visual with your presentation, I think all of us would sort of laugh by the fact that people don't read anything anymore if you must show a table but at least show a visualization with it yours ,one right where we look at a just some graphic showing visualizations.

Make The Title of the Graph Tell the Story

Michael Lesiecki - Here is a good one, here's something that I learned over time, make the title of the graph tell the story now I'll pull up from our live thing.

Untitled Slide

Michael Lesiecki - I'm not going back live I'm just pulling this out, so here's the title of this graph Total Funded by Funding Source well that's sort of humdrum here's what I should have said Lara, US Department of Education is the dominant funding source for this year wouldn't that make more since there's my analysis right in the title and I don't have to figure out what's going on, so people I can see you nodding your heads use the title to give your analysis of the data, it's really an important thing.

Practical Hints

Michael Lesiecki - Practical hints, we've already talked about this encourage ownership by including dashboard as an agenda item in a staff meeting, don't do it once a year, keep it up front.

Lara Smith - Keeps people on track.

Michael Lesiecki - It really does and then link to those big goals and objectives right that's the important stuff.

More Hints

Michael Lesiecki - Another hint I don't know how many times people have asked us, could you help us we need to do a presentation it's got to be done by five o'clock well you can use your dashboard when people ask you for information about presentations you say yep here's a dashboard link you can see the trends you can use that to supplement your presentation, they are happy.

Lara Smith – As I said our IR Department keeps the dashboard live for everyone to go there and use.

Michael Lesiecki - It's perfect.

Lara Smith - It's very helpful.

Michael Lesiecki - Yeah they look like stars when you do that you say oh my god they already knew the answer to my question before I asked it, so that's some advice.

Summary: You Can Now

Michael Lesiecki -Okay summary now as we think about wrapping up today, what can you do now well this is pretty cool you can go home tonight at dinner you can say you know what I can tell you the three major elements of a dashboard they're going to laugh. You can also Lara distinguish plain old informational elements from those important key performance indicators you can actually do that and now you know how to create ownership to make this thing dynamic. And you saw today that my god I could use Excel to develop a pretty straightforward dashboard or I could get excited as Mike isn't think about doing it in the cloud with some of those interesting software programs so that's the key things you can do.

Own Your Dashboard

Michael Lesiecki – Here's my final message before we go into the final question period on this thing right don't just do it but own it, make it part of what you do. I've use it in our projects Lara I know you've

been involved you helped create dashboards I work on them together with you it makes a difference to what you do so own that thing.

Lara Smith - It really does it keeps you up to date with the project, it helps you think of reasons why you may be extremely successful or maybe falling behind, there's a lot of value in dashboards.

Michael Lesiecki - I think that's really true.

Questions
Michael Lesiecki - We have a good grants friendly grants department says s frequently asked often at the NSF always advises that too. And by the way folks here's my email mlesiecki there'll be a test on the spelling of that name , mlesiecki@gmail account so go ahead and write me and I'd love to talk about dashboards ,I'd be happy to talk about it. As we go into our final question now let's think for questions for moment let's take a look at the questions that you might have seen in the question window Lara what do we got?

Lara Smith - Well I've been chatting with a participant about how to track grants by strategic initiative and one of the ways that we do that is we're forced to do that through our fiscal management system that where we upload our grants and load the budget and things like that we have the option of choosing which area the grant supports and so that's an easy way to gather that data and to run reports if it becomes part of your regular system.

Michael Lesiecki - Hmm good point, good point. If we look at a some of the other questions here I think there was it's actually more of a comment but I think all of us would relate to this one, how do you spend your time isn't that somehow related to this and you know that's funny you spend a lot of time on funded proposals and non-funded proposals right is there some way that you could judge it I don't know how to do that it's not the time that matters and yet time is critical to the effort that you make on these things I suspect.

Lara Smith - That goes back to the funding rate you know there are proposals when we know we're applying and we're going to be highly competitive just by nature and we may receive direction from the President that says hey I want us to go for this you know even if we don't get it we may receive valuable feedback from the reviewers there may be a number of reasons that we choose to apply for something knowing that we might not get it and we end up spending just as much or more time on it.

Michael Lesiecki - Let's shift to what we'll take as the last question has come in from three different of our attendees so that just gives you a sense of how important this is how do you define a competitive proposal we talked about tracking competitive proposals, how would you define it I've got an idea but let me ask you first what would you think?

Lara Smith - Well I would say in developing it I want to check to make sure it's a viable opportunity for us see how well we are aligned to it, Do we are with it in the plan of operation there's also key there's often key elements that they're looking for. I would think most about how well we are addressing them this is in the proposal planning stages but then after the proposal is reviewed a lot of times you get feedback from the reviewer and the score so I would say in that case really truthfully I would say you want it a 90 percent or higher to be competitive because I don't think they fund things down into the 80 percents.

Michael Lesiecki - Yeah you know I'll give you my cents and then we'll start to wrap up the NSF side a quality proposal is going to get scores in the excellent and very good range and an on quality proposal or one that doesn't strike the reviewers is going to get goods or fairs or something like that so that's not a very hard metric but if I'm getting excellence in very goods at some level I'm doing okay so for me that's sort of an internal metric. Here's the one last comment from an attendee and it hadn't really occurred to me but it's important they're starting to track grant projects worked on that didn't necessarily yield a proposal submission that round there's value there right?

Lara Smith –Yes.

Michael Lesiecki - I totally agree yeah all right folks there are some ideas about dashboards it's easier than you think but you can spend more time on it than you might think too but I think the payoff in the end is good let's wrap up for today the Lara our attendees are just amazed of just how perfectly on time we are.

Join Us – All Webinars 3pm Eastern
Michael Lesiecki - But join us next time at June 15th oh man Prior Learning Assessments that is getting such interest at colleges around the country using prior learning assessments for recruitment and retention I'd like that brought to us by colleagues at the South Carolina Center and Clemson and by Don McCoy's a great speaker I've heard him at the PI conference take a look and check it out ATEcenters.org/ CCTA for upcoming webinars.

Join us in Salt Lake City, UT!
Michael Lesiecki - And join us in Salt Lake City and HI-TEC.

DOL and NSF Workforce Convening
Michael Lesiecki - Where we'll be have a workforce convening on Friday July 21st you can register here I guess you can really click that on your screen but if you go to HI-TEC that website there'll be a place to register and it's free so it's fun to do. So Lara that ends our presentation today. Friends as you leave a brief survey and I really mean brief will open up in a second browser window take a moment click on that tell us how this was nearly the greatest webinar that you've ever been or whatever you've got to think about it but give us some feedback as that helps us make things better. Lara any final comments for our audience on how to think about dashboards and use them most effectively.

Lara Smith - Well I have a question if I wanted to know about more about the Microsoft Business Intelligence would I just go and Google that because I'd love to post some things live.

Michael Lesiecki - You can I've done that or if you like send me an Email at mlesiecki you put it in the in the comment window did you hit respond to all with that did they get it or.

Lara Smith - I will do that.

Michael Lesiecki - Would put mlesiecki on one of those and hit respond to all mlesiecki@gmail.com to shoot me an e-mail, we can talk about Business Intelligence or Tableau or whatever you've got and sure use Google there's some money involved with doing those things licensing and things like that but it's quite doable so that's what I would say. Colleagues that officially ends our webinar today thank you to the CCTA for the support of all of us and the National Science Foundation and for all of you for

participating today join us on June 15th and future CCTA webinars. Lara thank you again for being part of this.

Lara Smith - Thank you for having me.

Michael Lesiecki - Okay turn off our audio and as you exit you'll see that survey come up by everyone.