



**ATE-CENTERS**

# Creating Dashboards For Grants Development And Management

May 18, 2017

[Click here to watch the webinar recording](#)



# Webinar Details

- For this webinar you will be in listen only mode using your computer or phone
- Please ask questions via the question window
- This webinar is being recorded – you will be sent a recording link

## Brought To You By:

**CCTA** | CENTERS COLLABORATIVE FOR TECHNICAL ASSISTANCE

With Additional Support by the ATE Collaborative Impact Project

**ATE**CENTERS

Disclaimer: This material is based upon work supported by the National Science Foundation under Grants # 1205077 and # 1261893. Any opinions, findings and conclusions or recommendations expressed in this material are those of the author(s) and do not necessarily reflect the views of the National Science Foundation.

# The CCTA is led by



- **National Center for Convergence Technology (CTC)** at Collin College in Frisco, TX (lead)
- **South Carolina ATE National Resource Center (SCATE)** at Florence Darlington Technical College in Florence, SC
- **Florida ATE Center (FLATE)** at Hillsborough Community College in Tampa, FL
- **Bio-Link Next Generation National ATE Center for Biotechnology and Life Sciences (Bio-Link)** at City College of San Francisco in San Francisco, CA
- **Networks Resource Center** at the Maricopa Community College District in Phoenix, AZ

# CCTA Purpose

- Technical assistance services to DOL TAACCCT and NSF grantees and workforce-oriented programs of all kinds
- Deliverables
  - Topical webinars on existing and new solutions
    - Live/recorded with attendee Q&A
  - Identify and document best practices
  - Host convenings

# Poll #1: Your Affiliation

- A. I am involved with an NSF grant
- B. I am involved with a TAACCCT grant
- C. Both
- D. Neither



# Poll: How many people are listening with you?

- A. None
- B. 1
- C. 2
- D. 3 or more

# About the Presenter

- I have had the privilege to be a PI and Reviewer for both NIH and NSF grants since 1989
- My technical background is chemical physics with a lot of focus on applications of laser technology in science and medicine



Michael Lesiecki  
Executive Director  
MATEC

# Also Joining Us Today



Lara Smith  
Coordinator of Grants  
Development and Management  
GateWay Community College

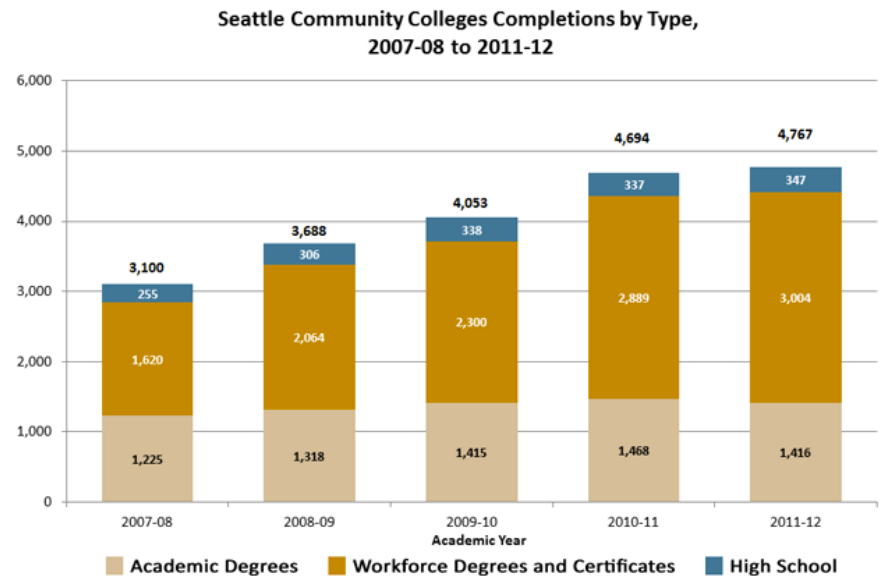


# Context

- Grant developers and resource development personnel are managers today
- They are increasingly queried about
  - Evaluation
  - Outcomes
  - Evaluators
  - Evidence
  - Data management

# Grant Coordinator Job Description\*

- *Develop, implement, monitor and evaluate a grant management and reporting system*



\*Germannanna Community College

# 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

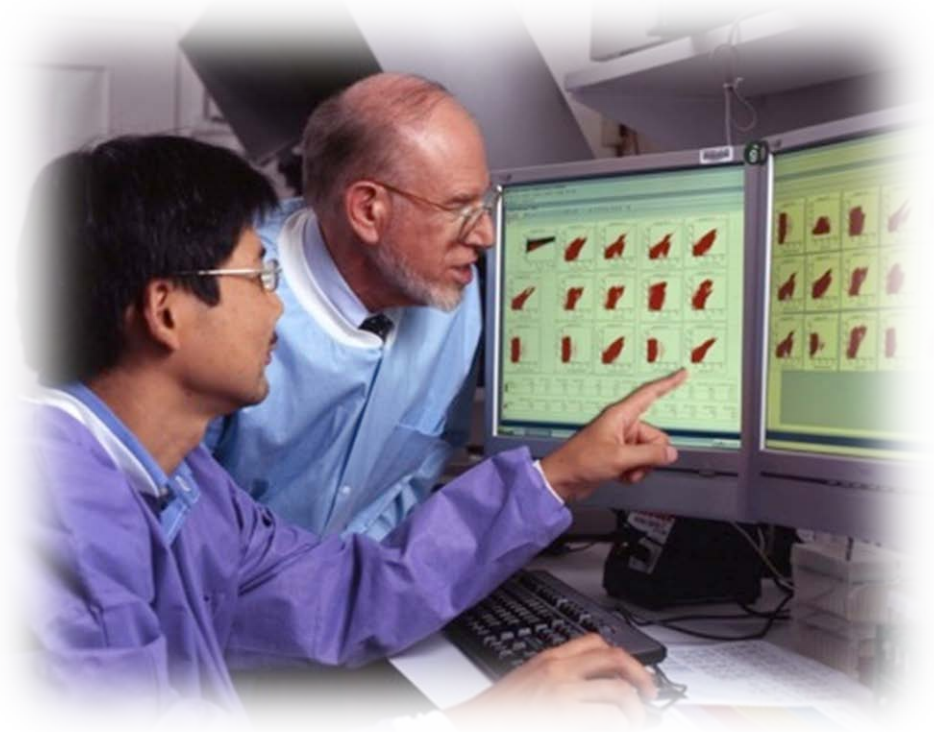
Source: Brustein & Manasevit, [www.bruman.com](http://www.bruman.com)

# 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

# Points of View

- The Development Office, Sponsored Research Officers and Their Teams



NIH Image Gallery, NCI

# Today's Objectives:

- Define dashboard elements
- Distinguish informational elements from trends and Key Performance indicators (KPIs)
- Create ownership to make the dashboard a dynamic reporting tool
- Develop your own dashboard with examples you can use
- Publish your dashboard on the web



# Elements

## Dashboards

- Data and Trends
- Metrics and measures
- Key Performance Indicators (KPIs)

# Let's Get A Sense Of A Dashboard

## Seattle College's Data Dashboard

Student  
Profile

Enrollment

State FTES

eLearning

Diversity

Student  
Achievement

<http://www.seattlecolleges.com/DISTRICT/district/facts.aspx>

# Seattle Colleges Student Profile

(Fall 2016-17)



College	Fall Quarter	Veteran?	Recent HS Grad?	Enrollment Status	Fund Source
(All) ▼	2016-17 ▼	(All) ▼	(All) ▼	(All) ▼	(All) ▼

Fall Student Count

25,592

Median Age

28

Prior Education  
(B.A. or higher)

14%

Race/Ethnicity  
(students of color)

45%

Seattle Resident?

81%

Has Dependents?

20%

Full Time Student?

39%

Receives Financial Aid?

13%

 Professional/Technical & Other

 Academic & College Transfer

 Basic Skills/ Pre-College

## What is our Enrollment by Student Type?



Professional/Technical  
& Other



52%

Student  
Profile

Enrollment

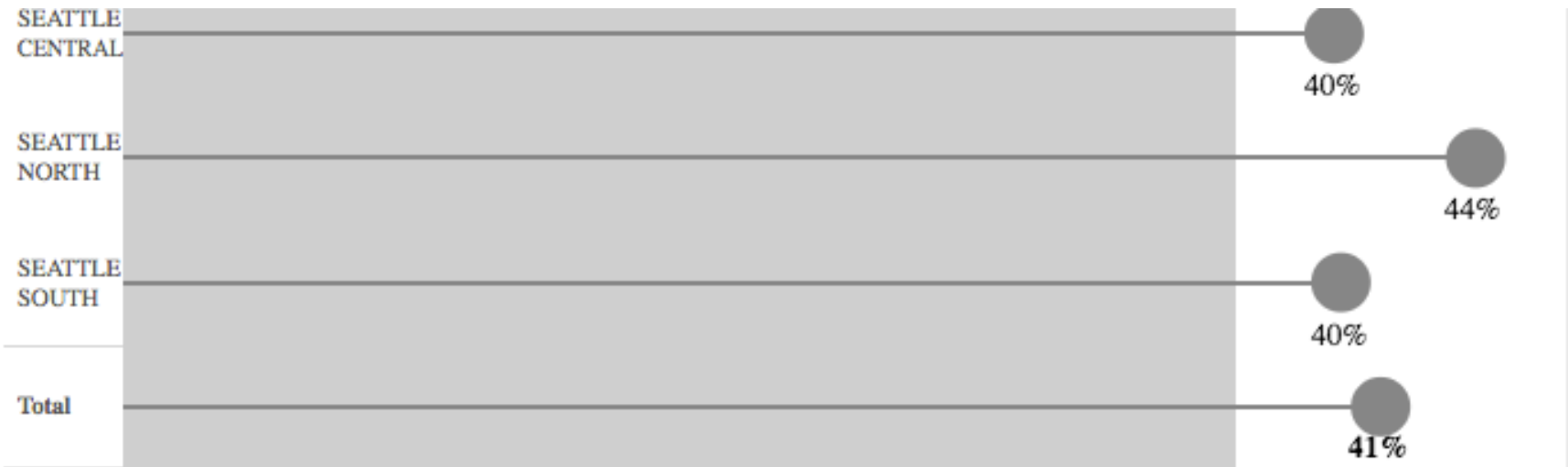
State FTES

eLearning

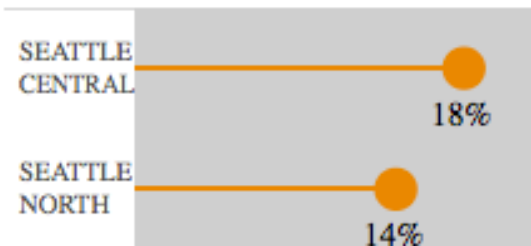
Diversity

Completions

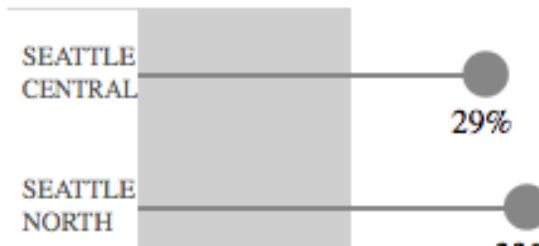




Transfers Who Earned Degree



Transferred without Degree



Prof/Tech Completions



# 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

# Dashboard – You Are Creating An Outline

## Dashboard (Sample)

Data and Trends

Awards by College

Occupational Programs

5-year Program Trend

5-year Award Trend

Metrics and Measures

# Now Set Your Links

## Dashboard (Sample)

Data and Trends

Awards by College

[Occupational Programs](#)

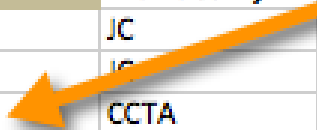
5-year Program Trend

5-year Award Trend

Metrics and Measures

# Dashboard - Setup In Excel

	A	B	C	D	E	F	G
1		<b>Workforce Development Dashboard</b>					
2		Last Revision Date: 4-5-13					
3							
4		<b>Trends</b>	<i>Provided By:</i>				
5	1	<a href="#">Awards by College</a>	JC				
6	2	<a href="#">MCCCD Occupational Programs</a>	JC				
7	3	<a href="#">Occupational Program Activity - 5 year trend</a>	CCTA				
8	4	<a href="#">Trends In Ocupational Awards</a>	JC				
9		<b>WD Metrics and Indicators</b>					
10	5	<a href="#">AZPMAP</a>	RH				
11	6	<a href="#">Google Analytics</a>	JC				
12	7	<a href="#">GPEC Prospect Overview</a>	SK				
13	8	<a href="#">Healthcare Outlook</a>	SP				
14	9	HTWI	RH				
15	10	<a href="#">Information Requests</a>	JC				
16	11	<a href="#">Kuder</a>	KP				
17	12	<a href="#">Lead Tracking</a>	SK/RH				
18	13	<a href="#">Maricopa Nursing Metrics</a>	SP				
19	14	<a href="#">MATEC NetWorks</a>	ML				
20	15	<a href="#">Perkins</a>	JKF				
21	16	<a href="#">Prop 301</a>	SK				
22	17	<a href="#">Use of Workforce Development Products</a>	JC				
23	18	<a href="#">Workforce Connections</a>	KP				



# Now “Present” Your Information

## Dashboard (Sample)

Data and Trends

Awards by College

[Occupational Programs](#)

5-year Program Trend

5-year Award Trend

Metrics and Measures



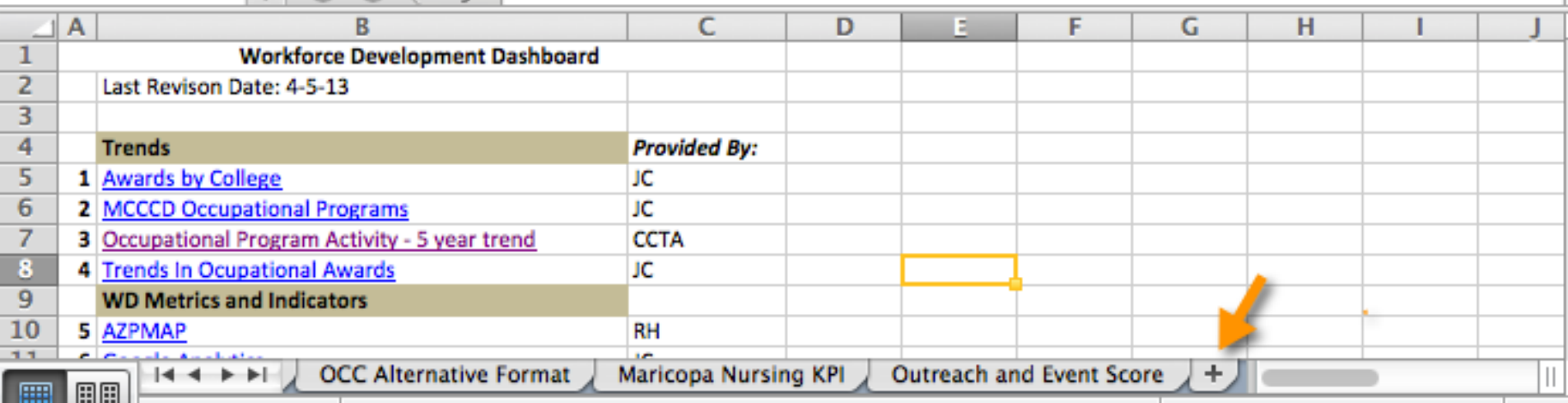


# When You Click On The Data Or Trend Element It Is “Presented”

C	D	E
Occupational Programs		
<b>Category</b>	<b>2012/</b>	<b>2013/</b>
Active Occupational Courses	6788	
Active AAS Programs	329	
Active CCL Programs	638	
data source: CCTA		
Maricopa Occupational Programs		
Kuder	301	Ext. Funding
Lead T		

# Review

- First identify your Data and Trends
- Set up in Excel as an outline of your dashboard
- “Insert a sheet” for each element



	A	B	C	D	E	F	G	H	I	J
1		Workforce Development Dashboard								
2		Last Revision Date: 4-5-13								
3										
4		Trends	Provided By:							
5	1	<a href="#">Awards by College</a>	JC							
6	2	<a href="#">MCCCD Occupational Programs</a>	JC							
7	3	<a href="#">Occupational Program Activity - 5 year trend</a>	CCTA							
8	4	<a href="#">Trends In Occupational Awards</a>	JC							
9		WD Metrics and Indicators								
10	5	<a href="#">AZPMAP</a>	RH							
11	6	<a href="#">Occupational Activity</a>	JC							

The screenshot shows the bottom of the Excel window with the sheet tab bar. The tabs are: OCC Alternative Format, Maricopa Nursing KPI, Outreach and Event Score, and a '+' button. An orange arrow points to the '+' button.

# Link Each Element To Its Sheet

## Workforce Development Dashboard

Last Revision Date: 4-5-13	
Trends	
1 <a href="#">Awards by College</a>	JC
2 <a href="#">MCCCD Occupational Programs</a>	JC
3 <a href="#">Occupational Program Activity - 5 year trend</a>	CCTA
4 <a href="#">Trends In Occupational Awards</a>	JC
WD Metrics and Indicators	
5 <a href="#">AZPMAP</a>	RH
6 <a href="#">Google Analytics</a>	JC
7 <a href="#">GPEC Prospect Overview</a>	SK

- Format Cells... ⌘1
- Pick From List...
- Edit Hyperlink... ⌘K
- Open Hyperlink
- Remove Hyperlink

# Anchor The Sheet To Its Element

ScreenTip.

Web Page Document E-mail Address

Select a file to link to. Or, in the Link to box, enter the path to the file.

Select...

Anchor:

'OCC Program 5yr Trend'!A1

Locate...

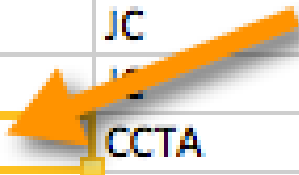
If you want to link to a specific location (anchor) within the file, enter the name of the anchor above or click Locate to find it.

# You Are Now Ready to Show Your Dashboard



# Your Dashboard Is Ready – Clicking On An Element Presents The Information

2		Last Revision Date: 4-5-13		
3				
4		<b>Trends</b>	<i>Provided By:</i>	
5	1	<a href="#">Awards by College</a>	JC	
6	2	<a href="#">MCCCD Occupational Programs</a>	JC	
7	3	<a href="#">Occupational Program Activity - 5 year trend</a>	CCTA	
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9		<b>WD Metrics and Indicators</b>		
10	5	<a href="#">AZPMAP</a>	RH	
11	6	<a href="#">Google Analytics</a>	JC	
12	7	<a href="#">GPEC Prospect Overview</a>	SK	
13	8	<a href="#">Healthcare Outlook</a>	SP	
14	9	HTWI	RH	
15	10	<a href="#">Information Requests</a>	JC	
16	11	Kurder	KP	



# Result Of Clicking On 5-Year Trend

<b>Academic Year</b>	<b>Active Occupational Programs (AAS/CCL)</b>	<b>Deleted Programs</b>	<b>Requests for Moratorium/Total Programs on Moratorium</b>	<b>New Occupational Programs (AAS/CCL)</b>
11-12	97	57	44/145*	20
10-11	1020	31	35/134*	19
09-10	996	21	29/102*	15
08-09	984	41	14/74*	17
07-08	976	40	8/174*	44

# Lara



What are the most important trends and data that you track in your grants office?



# Elements: Distinguishing

## Dashboard (Sample)

Data and Trends

Metrics and Measures



Key Performance Indicators (KPIs)

# Dashboard – Metrics and Measures

## Dashboard (Sample)

### Data and Trends

Awards by College

Occupational Programs

5-year Program Trend

### Metrics and Measures

Google Analytics

Information Requests

# “Analytics” As A Measure



# Dashboard – Metrics and Measures

## Dashboard (Sample)

Data and Trends

Awards by College

Metrics and Measures

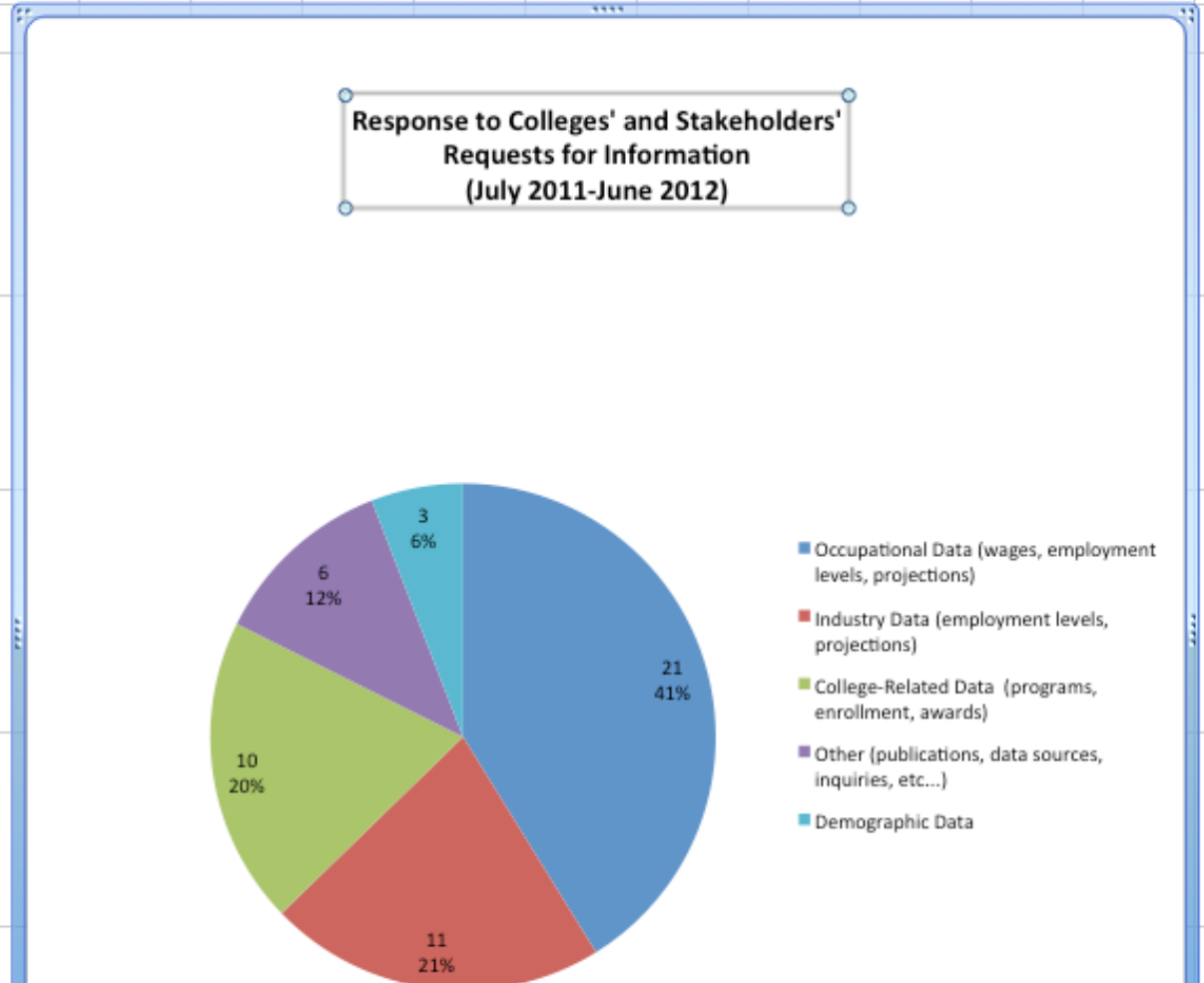
Google Analytics

Information Requests

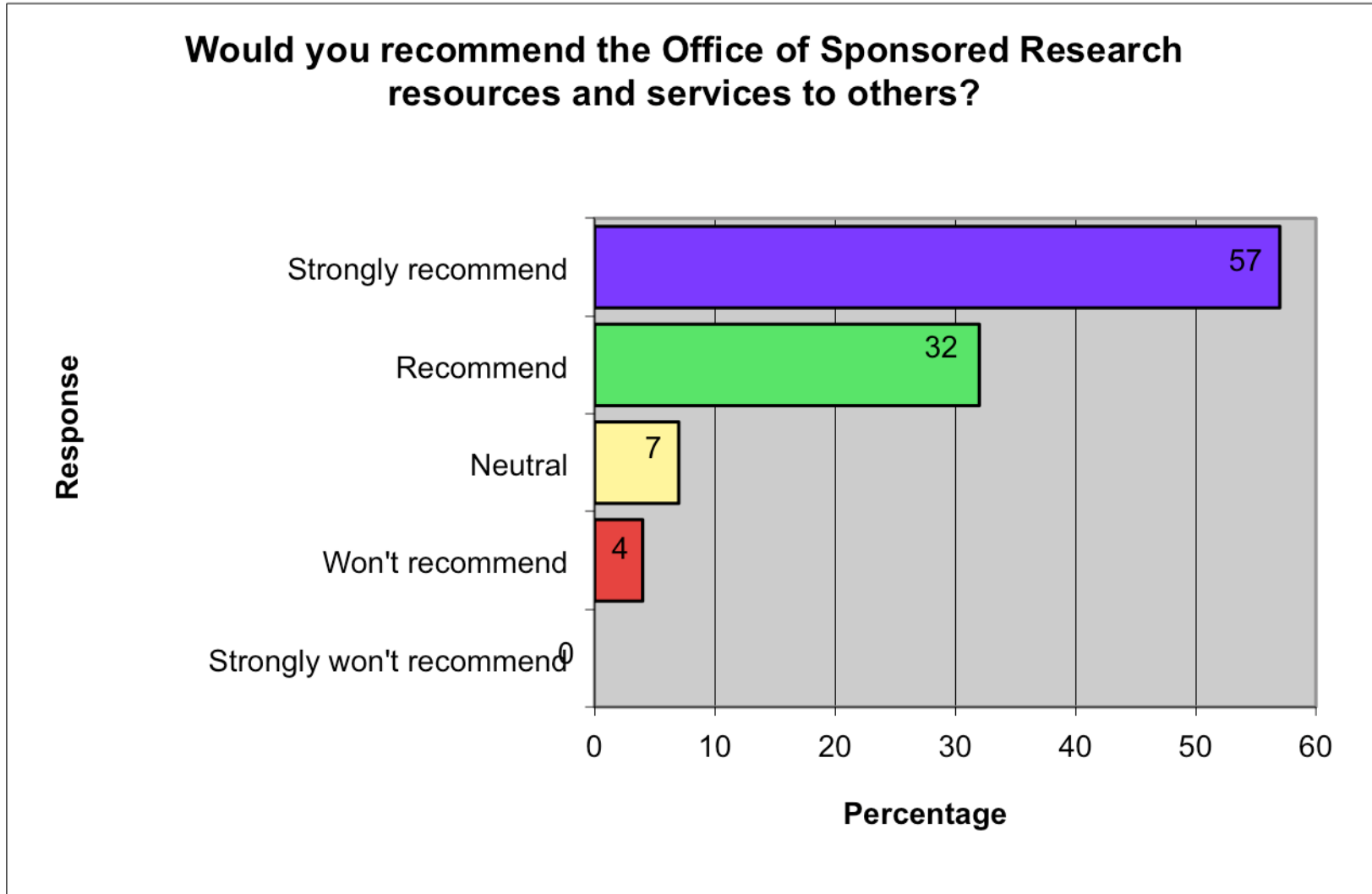


# “Requests For Information” As A Measure

Type of Request	Number	%
<b>Occupational Data</b> (wages, employment levels, projections)	21	41
<b>Industry Data</b> (employment levels, projections)	11	21
<b>College-Related Data</b> (programs, enrollment, awards)	10	20
<b>Other</b> (publications, data sources, inquiries, etc...)	6	12
<b>Demographic</b>	3	6



# You Can Get These Measures by Conducting Your Own Surveys



# Lara



Do you track requests for assistance?

# Questions?





# Key Performance Indicators (KPIs)

- You have a lot of flexibility with Data, Trends, Metrics and Measures
- However KPIs are limited in number and very specific

NIH Clinical Center, Isolating Adult Stem Cells Using Ficoll Gradient Centrifugation



# If Only We Had Something Like This



Nike Fit Band Senses Performance  
and Metrics

# Poll #3

Choose The Best KPI

A. Funding Rate (% of submitted)

B. Number of Competitive Proposals Submitted

# Poll #4

Choose The Best KPI

A.Total \$ Awarded Per Year

B.Number of Grant Training Sessions  
Conducted

# Dashboard – KPIs

## Dashboard (Sample)

Data and Trends

Awards by College

Occupational Programs

Metrics and Measures

Google Analytics

Information Requests

**Key Performance Indicators**



# Lara

Do you have Key Performance Indicators?

# Dashboard – KPIs: Examples

## Dashboard (Sample)

Data and Trends

Metrics and Measures

**Key Performance Indicators**

Funding Rate

Nursing Program Outcomes

# Nursing KPIs

<b>Nursing</b>	<b>KPI</b>	<b>2011</b>	<b>2012 (Preliminary)</b>
	% of Alumni Employed	67.6%	82.9%
	No. of Graduates	923	910
	RN-NCLEX Pass Rate	94.2%	97.1%
	Graduation Rate	79.6	75.6%



# KPIs Distinguished By Direct Link to Big Goals

<b>Number of occupational program completers passing a licensing exam or earning an industry-recognized credential</b>		<b>KPI</b>	<b>2011</b>	<b>2012 (Preliminary)</b>
		% 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>

# Make Your Dashboard Real And Evergreen

- Ownership
- Renew/Update process



# Look at Column C

A	B	C
	<b>Trends</b>	<i>Provided By:</i>
1	<a href="#">Awards by College</a>	JC
2	<a href="#">MCCCD Occupational Programs</a>	JC
3	<a href="#">Occupational Program Activity - 5 year trend</a>	CCTA
4	<a href="#">Trends In Occupational Awards</a>	JC
	<b>WD Metrics and Indicators</b>	
5	<a href="#">AZPMAP</a>	RH
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14	<a href="#">MATEC NetWorks</a>	ML
15	<a href="#">Perkins</a>	JKF
16	<a href="#">Prop 301</a>	SK
17	<a href="#">Use of Workforce Development Products</a>	JC
18	Workforce Connections	KP
	<b>Key Performance Indicators (KPI)</b>	
19	<a href="#">External Funding</a>	ML/RH

# Let's Look At Very Active Community College's Development Office: Annual Activity Report



- [http://www.sinclair.edu/about/offices/grants/pub/annual\\_report\\_11/ActivityReportFY11.pf](http://www.sinclair.edu/about/offices/grants/pub/annual_report_11/ActivityReportFY11.pf)

# Summary

<b>Proposals</b>				<b>Pre-proposals</b>	<b>Reports</b>	<b>Story-boarding</b>	<b>Sub-contract</b>	<b>Pre-sen-tation</b>
<b>Funded</b>	<b>Pending</b>	<b>Not Funded</b>	<b>Total</b>					
56	5	16	77	21	20	10	16	3

<b>Total Projects</b>
147

<b>Total Funding</b>
\$7,092,324

<b>Success Rate</b>
72.73%

# Hillsborough CC Activity

## Page 19 - HCC Grants Activity Report, 2011-2012

[Basic HTML Version](#)

[Table of Contents](#) | [View Full Version](#)



**ANNUAL  
GRANT  
REVENUE\***

**Fiscal Year**

**Grant Revenues**

**2010-2011**

**\$8,380,178**

**2011-2012**

**9,233,024**

\*Based on allowable expenses.  
Source: June Issue, Board of Trustees  
Budget Workshop Notebook,  
Finance Division

# What A Development Office Dashboard Might Look Like

## Dashboard (Sample)

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

# What A Development Office Dashboard Might Look Like

## Dashboard (Sample)

### Data and Trends

Private Foundation Giving

### Metrics and Measures

Number of Grants Submitted

### Key Performance Indicators (KPIs)

Funding Rate



# What Matters To A Development Office? – What Is Dashboardable?

Return On Investment	Data, Metric or KPI
Funding Vs. Target	
Funding Rate	

# What Matters To A Development Office? – What Is Dashboardable?

Return On Investment	Data, Metric or KPI
Funding Vs. Target	<i>KPI</i>
Funding Rate	<i>KPI</i>

# More – What Is Dashboardable?

Number of Presentations	Data, Metric or KPI
Grant Performance	
Grant Monitoring	

# More – What Is Dashboardable?

Number of Presentations	Data, Metric or KPI
Grant Performance	Measure
Grant Monitoring	Metric

# More – What Is Dashboardable?

Grant and Grantee Information	Data, Metric or KPI
Number Of At Risk Grants	
Grants Under IRB Monitoring	

# More – What Is Dashboardable?

<b>Grant and Grantee Information</b>	<b>Data, Metric or KPI</b>
Number Of At Risk Grants	Measure or Metric
Grants Under IRB Monitoring	Metric

# More – What Is Dashboardable?

Number of Grant Opportunities	Data, Metric or KPI
Relationships With Grant Project Managers	
Number Of Grant Seeking Activities	

# More – What Is Dashboardable?

Number of Grant Opportunities	Data, Metric or KPI
Relationships With Grant Project Managers	?
Number Of Grant Seeking Activities	Measure



# More – What Is Dashboardable?

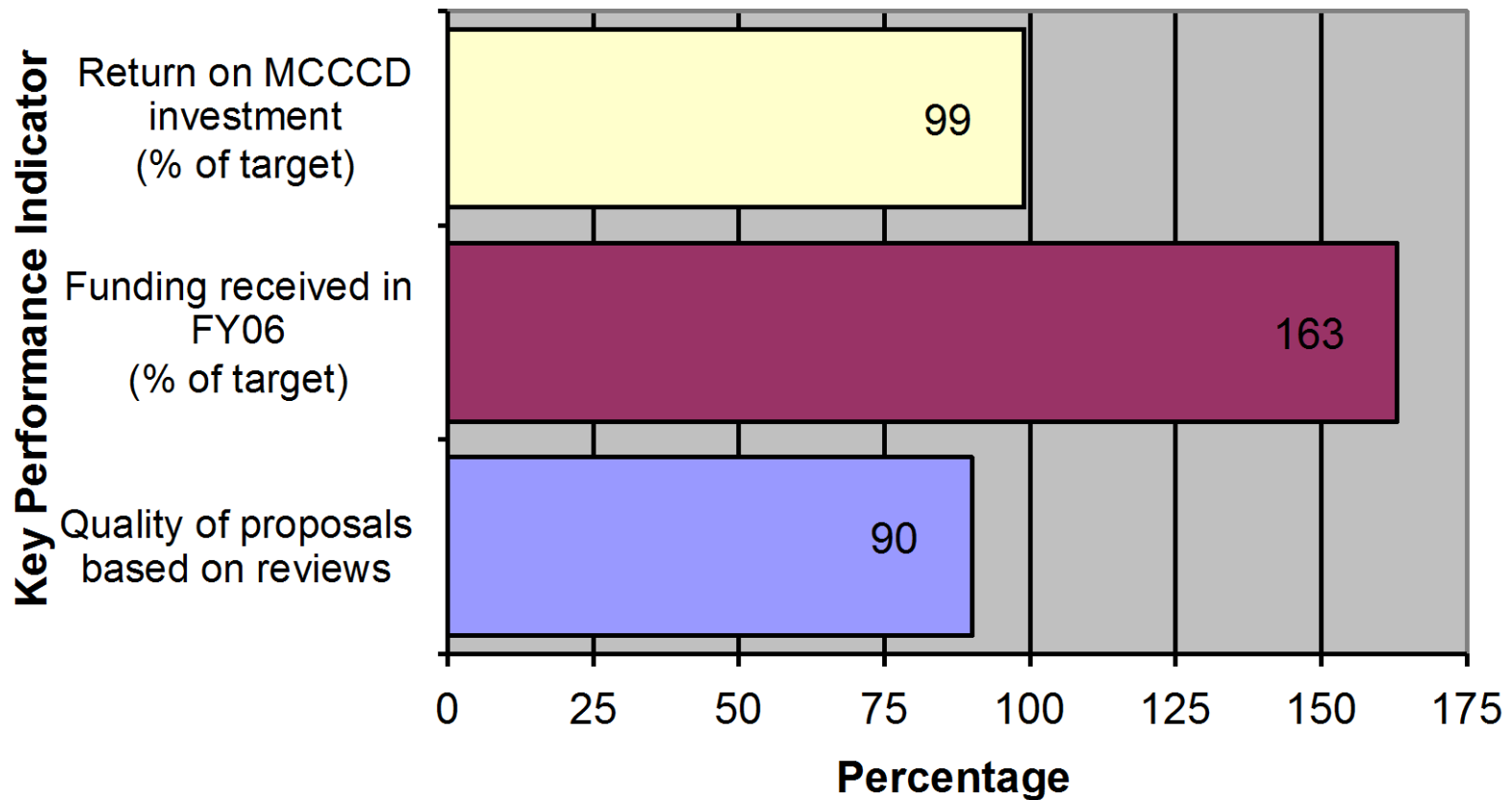
Editing of Proposals	Data, Metric or KPI
Budget Development Requests	
Research Requests	

# More – What Is Dashboardable?

Editing of Proposals	Data, Metric or KPI
Budget Development Requests	Metrics
Research Requests	Metrics

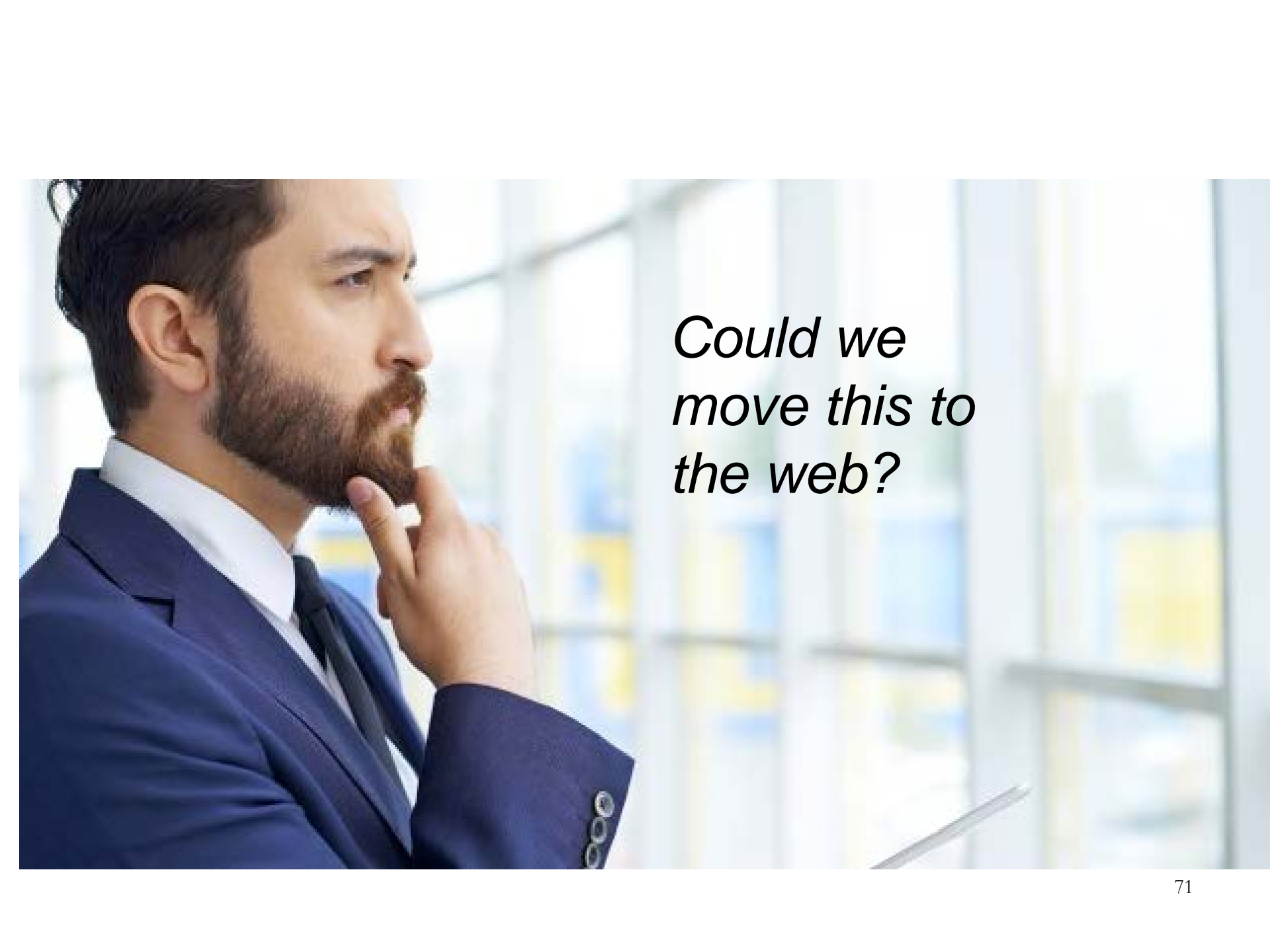
# More On KPIs

## Grant Funding Key Performance Indicators



# KPIs – The Hard Questions

- Number of grants and the funding rate – easy
- Are the grants developed sufficiently aligned to the mission? – hard
- Development of a “Culture” of grant seeking at your institution - harder

A man with a beard, wearing a dark 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. A laptop is partially visible in the bottom right corner.

*Could we  
move this to  
the web?*

# Yes

## Microsoft 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

# In The Cloud

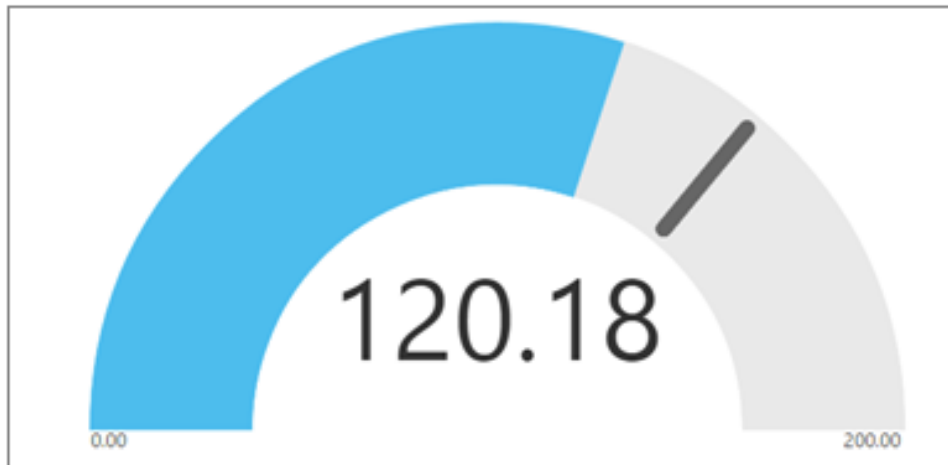
- Establish your data in Excel (or CSV)
- Determine the relationships you wish to display
- Select the visualization



## Maps: Basic maps



## Gauge charts



## Waterfall charts





# An Example: Interactive Grants Development Dashboard

- Grants Awarded by Funding Agency
- Grants Awarded by Strategic Initiative
- Grants Awarded College by College

[Link](#) to sample data

# Where Do You Add Value?

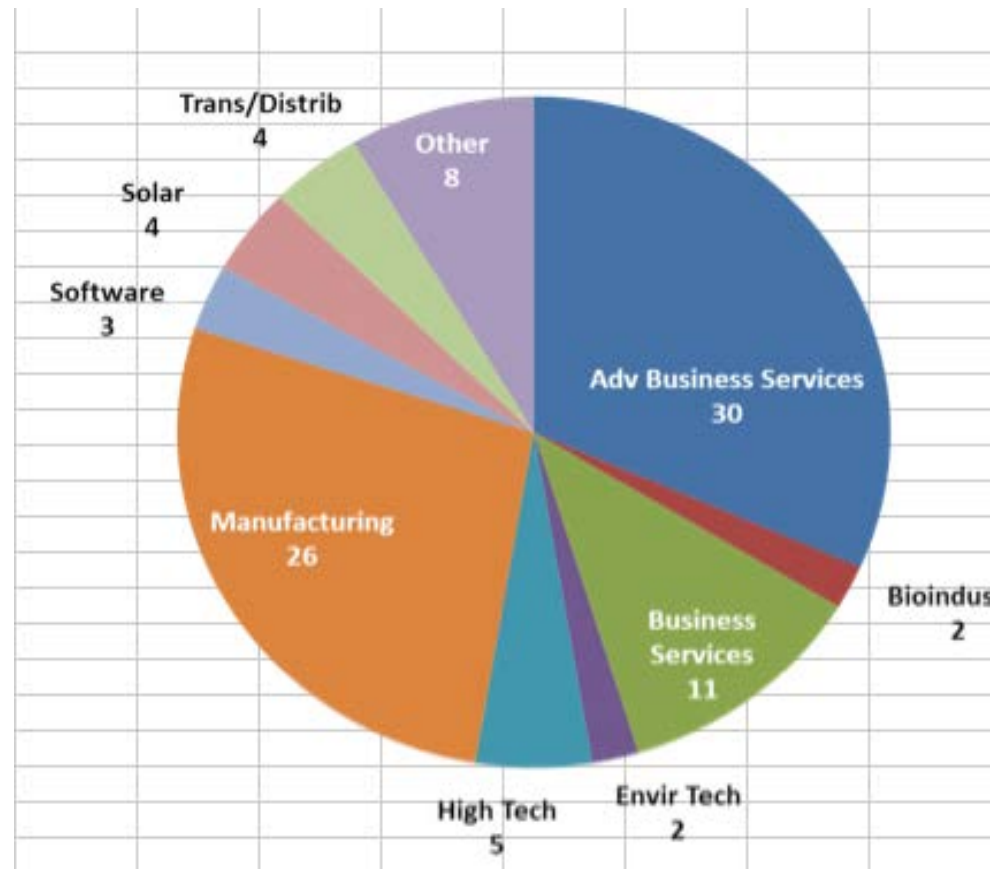
- “Resist the trap to chase grants for the allure of their monetary value – avoid negative entrepreneurship” Uri Treisman, UT Austin at the 2014 Learning Summit
- You can add real value by helping insure alignment to goals
  - How do you dashboard that?

# 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

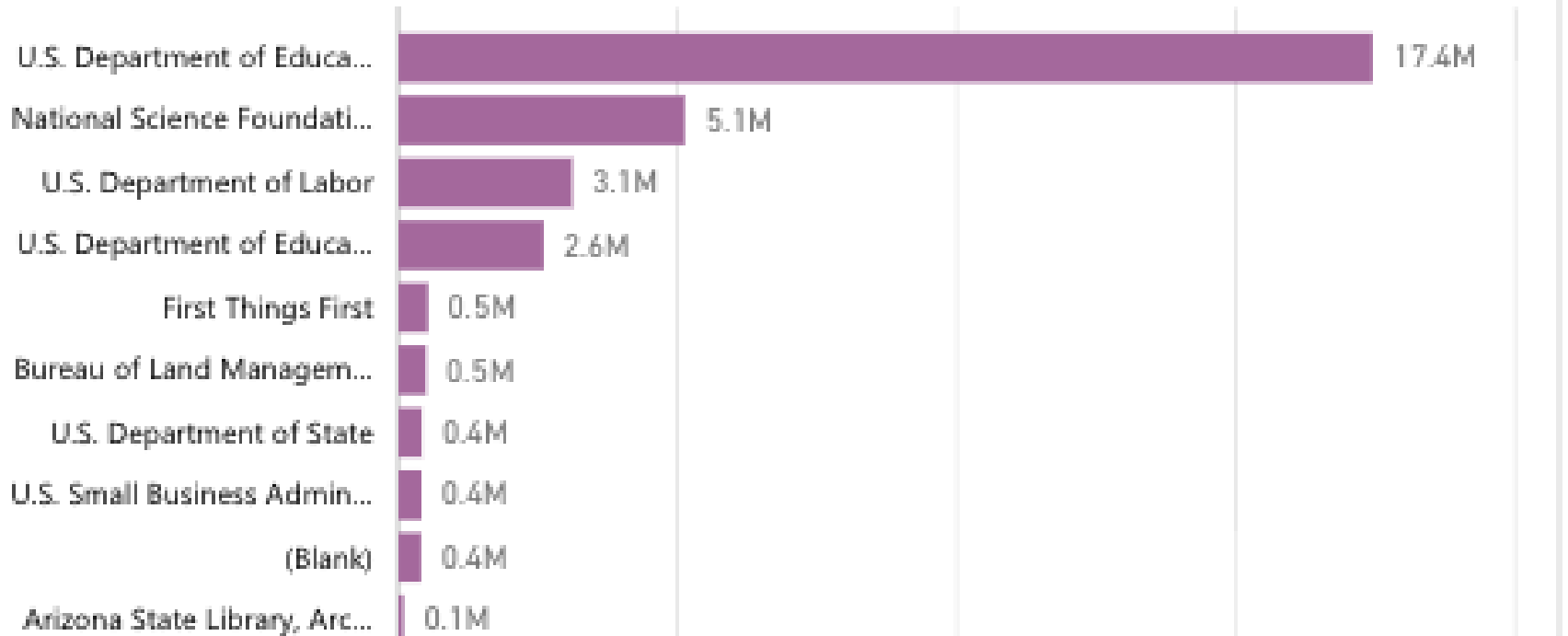
# Be Visual With Your “Presentation”

If you must show a table try to include a graphic as well



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

# More Hints

- It seems everyone is always asking for a report or material for presentations
- Link them into the Dashboard

<b>Key Performance Indicators (KPI)</b>	
<a href="#">External Funding</a>	ML/RH
<a href="#">Maricopa Nursing KPI</a>	SP
<a href="#">Occupational Graduation Rate</a>	IR
<a href="#">Outreach and Event Score</a>	ALL
<b>Reports</b>	
<a href="#">Governing Board Metrics</a>	ALL/IR



# 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!



# Questions

Ask Frequently, Ask Often

Follow Up Questions Welcome

[mlesiecki@gmail.com](mailto:mlesiecki@gmail.com)

# Join Us – All Webinars 3 pm Eastern

June 15, 2017

## **Using Prior Learning Assessments for recruitment and retention of special adult populations**

This webinar will offer insights into developing an effective recruitment strategy that encompasses Prior Learning Assessment (PLA) coupled with other methods to reach your goals. Proven approaches will be shared for recruiting special underrepresented populations such as minority groups, specific age groups, Native Americans, those with disabilities, and the socioeconomically disadvantaged. Practical and proactive strategies for increasing recruitment and decreasing drop outs will be highlighted.

### **Presenters:**

**Rick Roberts, SC ATE Center Apprenticeships**

**Serita Acker, Clemson University**

**Donald McCoy, K-to-College STEM Education Consultant**

**For Other Upcoming Webinars See: <http://www.atecenters.org/ccta>**

***Join us in Salt Lake City, UT!***



**July 17-20, 2017**



**[www.highimpact-tec.org](http://www.highimpact-tec.org)**

# DOL and NSF Workforce Convening

Free DOL and NSF Workforce Convening at HI-TEC on **Friday, July 21, 2017, from 8:30 am to 12:30 pm**. This convening will focus on writing competitive NSF ATE project grants. Specifically, this session will feature extensive Q&A opportunities to help you refine the ideas you have and preliminary proposal work you have started. To get the full benefit from this session it is highly recommended you participate in ([register here](#)) or view recorded webinars ([view here](#)) for:

Grants and Innovation – A Great Match

Grant Proposal Resources, Roadmaps, and Timelines

Developing Stakeholder Partnerships Internally and Externally for Successful Grants

Tips for a Competitive Proposal

All DOL TAACCCT grantees, NSF grantees, other in workforce education, and HI-TEC conference attendees are invited to register for this free technical assistance convening.

# WEBINAR SURVEY

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