Dashboard development and implementation for USAID local partners: *Preparing and presenting operational and analytic dashboards*

Andres Montaner

Senior Monitoring & Evaluation Manager, Right to Care

March 23, 2023

ASAP II
ACCELERATING SUPPORT TO ADVANCED LOCAL PARTNERS II

A FEW QUICK NOTES

1. Welcome Local Partners – **tell us where you're from in the chat.**

2. Please use the **Q&A box to ask any questions** and the chat box for answering questions asked by the presenters.

3. We have a few **polls** during the webinar today. They will pop up on your screen.

4. The presentation for today's webinar will be saved on ASAP's website at **www.intrahealth.org/asap-resources**

Rapidly prepare Local Partners to have the capabilities and resources to serve as Prime Partners for USAID/PEPFAR programming, in compliance with USAID and PEPFAR procedures, for PEPFAR program implementation in FY 2022 and 2023.

70% of USAID PEPFAR funding to local prime partners.

STRATEGIC OBJECTIVES

1. Strengthen Local Partners as they transition to receive PEPFAR funding as a USAID Prime Partner to comply with regulations.

2. Prepare Local Partners to directly manage, implement, and monitor PEPFAR programs, and maintain consistent PEPFAR program achievement and quality.

ASAP II
ACCELERATING SUPPORT TO ADVANCED LOCAL PARTNERS II

KEY RESULTS from ASAP I & II

ASAP has supported
126 local organizations in **18** countries

113 local partner organizations

13 local government partners

CURRENT ASAP II-SUPPORTED COUNTRIES

Angola

Cameroon

Côte d'Ivoire

DRC

eSwatini

Ethiopia

Lesotho

Malawi

Namibia

Nigeria

South Sudan

Uganda

Zimbabwe

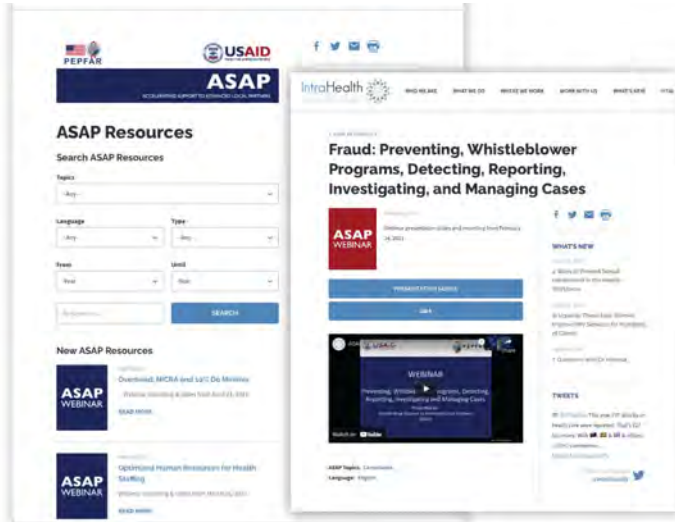**ASAP I additional countries:**
Kenya
Mozambique
South Africa
Tanzania
Zambia

18 TOTAL COUNTRIES

ON-DEMAND WEBINARS

USAID/ASAP has broadcasted **86 webinars** for more than **19,000 attendees** in **76 countries**.

Find past webinars on ASAP's web page
www.intrahealth.org/asap-resources

Choose your **language or topic.**

Featuring webinars in **French, English, and Portuguese.**

Topics

- Any -

Language

- Any -

Type

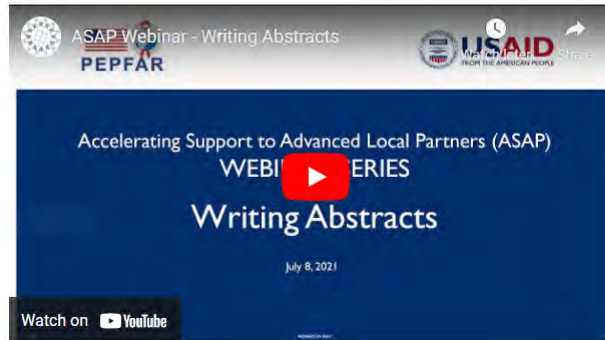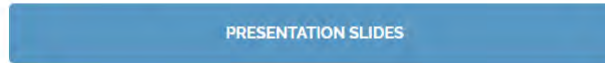- Any -

From

-Year

Until

-Year

By Keywords...

SEARCH

Download a pdf
of the presentation.

Watch a recording
of the webinar.

UPCOMING ASAP II WEBINARS

Path to Prime Webinar Series

Portuguese-language

Desenvolver Conselhos de Administração Extremamente Eficazes **– Mar 30**

French-language

Développement des affaires: Partage des meilleures pratiques de la Préparation au RFA (demande d'application) à l'après soumission d'une opportunité financière – **Apr 6**

English-language

Advanced Analytics for Data Driven Decision Making & Action – **Apr 13**

Practical Application GIS Methods & Tools to Guide Spatial Targeting & Micro-Planning – **Apr 20**

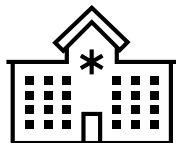**www.intrahealth.org/upcoming-asap-webinars**

Andres Montaner

Senior Monitoring & Evaluation Manager

Right to Care, a South Africa-based USAID Local Partner and ASAP II Consortium Partner
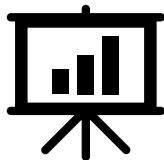
Overview

Data Sources

Data Submission

Visualization Options

Tutorials
-Data validation template in Excel
-Data visualization in PowerBI

Data sources

Paper

- Facility Registers

- Ministry of Health Reports

- Notepads

Software (Excel)

- No network requirement

- Visualizations within a template

- Validations within a template

Direct online capturing through desktop or smart device/tablet

- Website for data input and direct import

- Automated data capturing

- DATIM or DHIS2 (The District Health Information 2 Software)

Data submission methods

Manual data processing

- Physically collecting files

- Email or WhatsApp message submissions

Network database

- Secure File Transfer Protocol (SFTP)

- Email submissions

Direct online capturing

- Website for data input and direct import (Web forms, built in import procedures)

  - Ex: DATIM, DHIS2…

Most data processing tools are a combination of these 3, depending on the available resources at data submission, review, and interaction levels
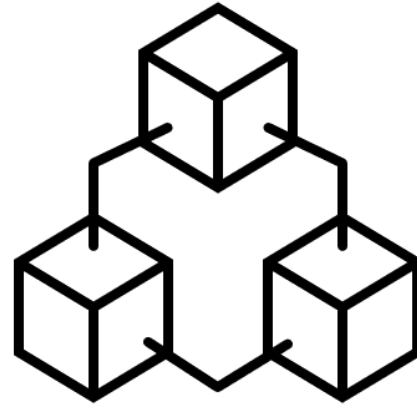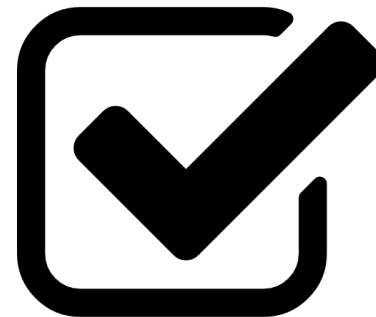
Data verification methods

Verification formulas

- Template verifications (Demo 1)

- Live online capturing verifications

  - Data integrity checks and data queries

Manual hierarchy approvals

- Manager review

  - Physical or software

- Data access rights and user authorization (also built within DHIS2)

POLL #1
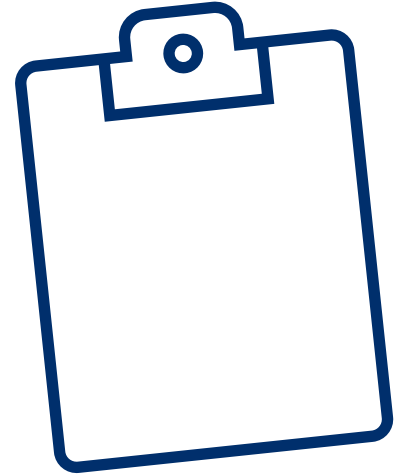
Question 1: **How can validations be built into an Excel template?**

a. Network   b. Formulas   c. Review   d. SFTP

Question 2: **What is NOT a discussed method of data SUBMISSION?**

a. Physically carrying records   b. Email

c. Online capturing   d. Verbal confirmation

Data visualization software

Growing field of data analysis

- Excel, Looker, DOMO, Tableau, PowerBI, Databox

Assess organization software and program requirements

- Reporting vs internal reviews
- Visualization
    - Excel Pivots (Demo 2)
    - Power BI (Demo 3)
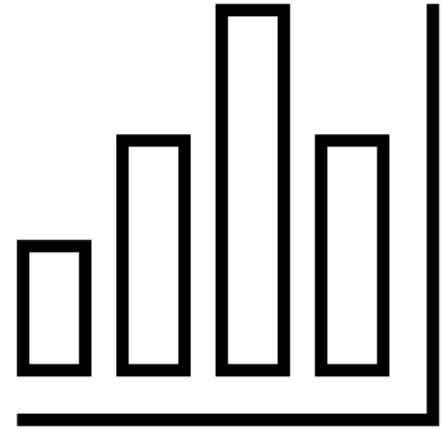
Data visualization- Demonstration Slides

Excel Validations

- Review validations tab in example template

  - Provides logic checks at data entry level

  - Data entry staff able to view "rule" in question and location of data in template to check data

- Creating a new sheet or table for validation formulas

  - Start formula with "=" then input validation formula

  - Ex: A1 = B1, A1 > B1, A1 = (B1+C1), (A1 + C1) <= (B1 + D1)…

    - True or False will be displayed

POLL #2

3. **What symbol is used to start a template validation formula?**

a. *   b. #
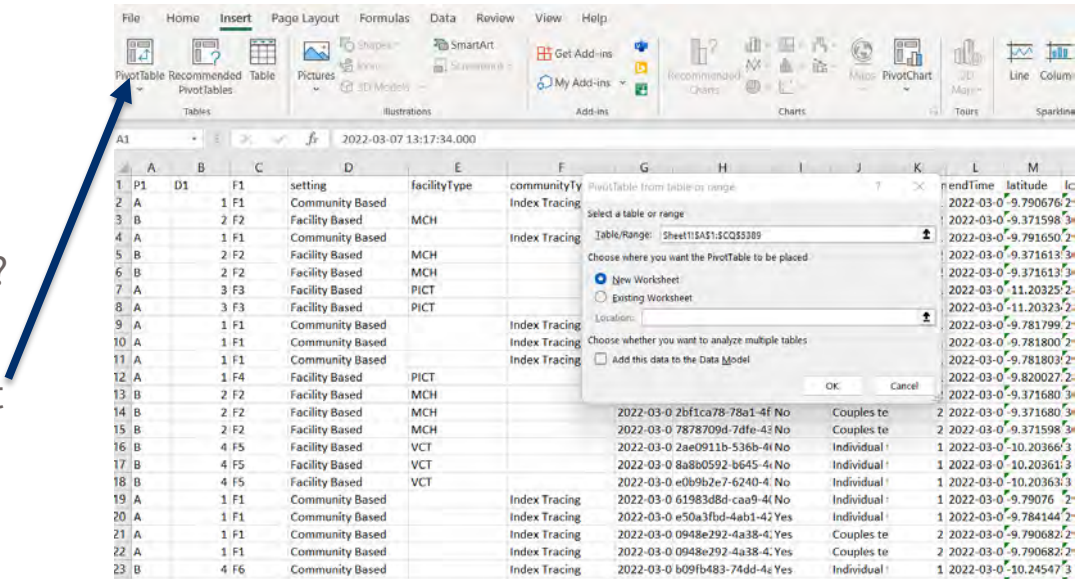c. -   d. =

4. **Do you need to add a function to the formula, for "True/False" to be displayed?**

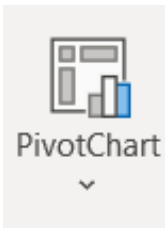a.   Yes   b.   No
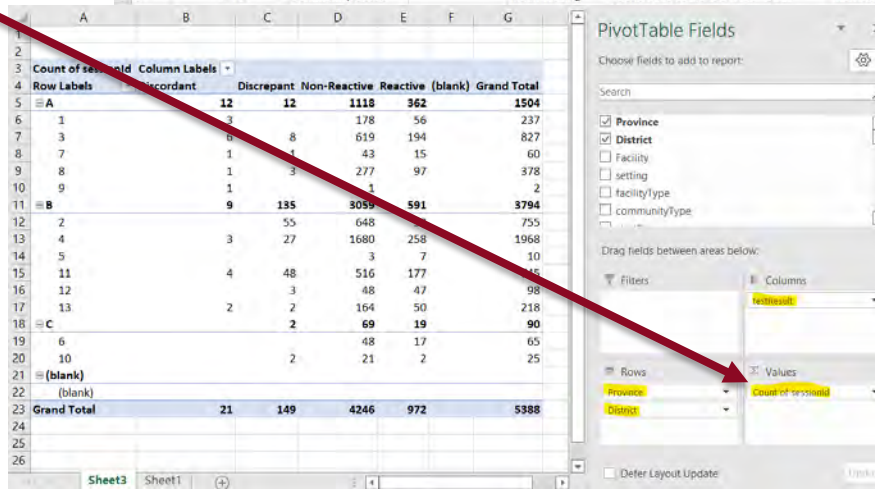
Excel Visual

- **Review data**

  - What can be investigated?

- **Pivot table**

  - Highlight all data -> Insert Pivot on next sheet
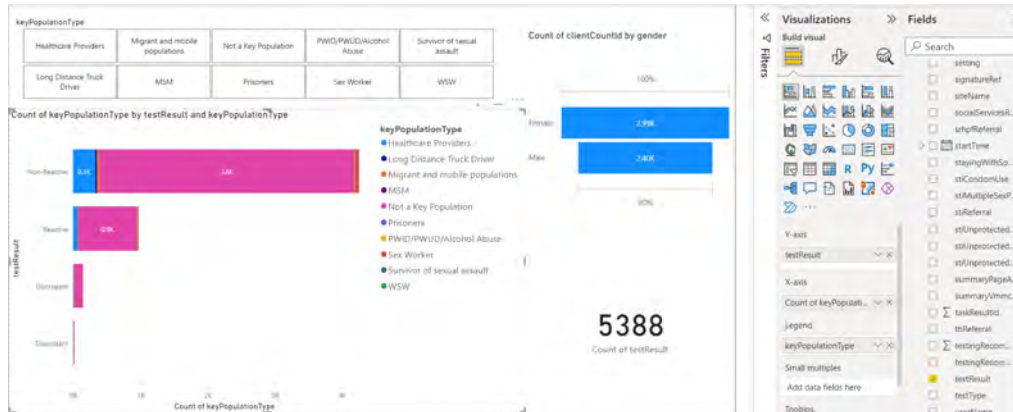
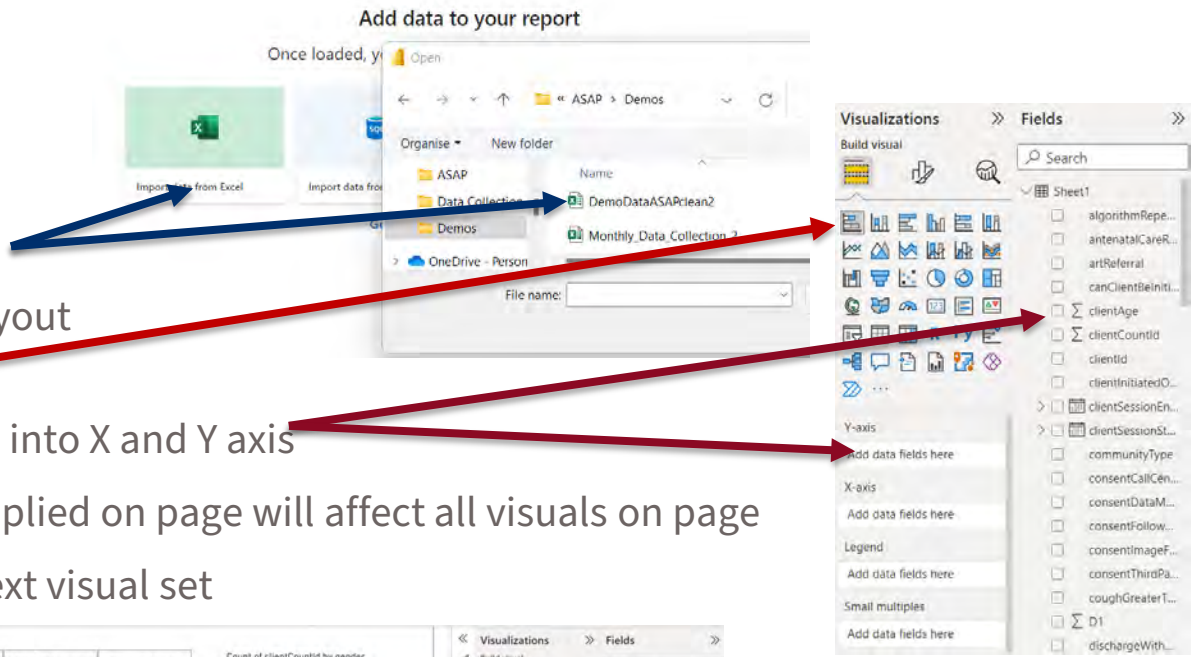 - Select unique ID

  - Troubleshoot tables

    - Rows and columns

- **Graphs**

  - Insert -> Pivot Chart

    - Troubleshoot graph types and indicator display options

PivotChart

PowerBI Visual

- Select data source

    - Confirm data layout

- Select desired visual

    - Input indicators into X and Y axis

    - NOTE: Filters applied on page will affect all visuals on page

    - New page for next visual set

Questions?