



2024 CSAC Challenge Award Submission **Executive Office Dashboard: Better Data, Better Discussions, Better Decisions**

Overview: Better data makes better decisions. The Executive Office created interactive dashboards connecting data from multiple sources, making it accessible in real-time for informed decisions.

Challenge: Like many organizations, the County of Riverside is developing a culture that values data driven decision-making. While the county collects and stores an immense amount of data, this information was historically not readily available, or it was kept in a format that did not aid decision-makers. As a result, county leaders were posing questions to team members with unique skillsets in developing data queries and then waiting for the requested reports to be pulled and analyzed, all the while hoping the “right” questions were asked. The process was arduous, and depending on how the questions were asked or interpreted, the data results lacked consistency. Using the momentum built from pandemic dashboards tracking everything from cases to testing to vaccination to personal protective equipment, the Executive Office (EO) endeavored to build a collection of dashboards to track non-pandemic related business – like countywide spending and staffing.

Solution: In mid-2021, the EO formed the Countywide Performance Unit (CPU) and assigned two analysts to create web-based, interactive and intuitive dashboards that pulled data from existing sources and centralized it on one platform that was readily available to leaders throughout the organization. The goal was to deliver *better data*, to inform *better discussions*, resulting in *better decisions*. CPU first identified what software was currently in use to track spending and staffing (ex: PeopleSoft, Simpler). Next, the team set out to find a platform that could be used to gather various data points from the multiple sources into one location and create visuals for an enhanced user experience, while allowing leaders to view the information from different angles. Additionally, the CPU analysts looked for software that could refresh the information automatically, thereby negating the need for constant data entry. CPU selected Microsoft Power BI as the solution that met all needs. Power BI’s row-level security gave CPU the ability to control access by department and by user, thereby ensuring data security in accordance with internal policies. Additionally, it allowed for the EO to access and analyze data countywide by fiscal year, portfolio, department, and budget unit, while allowing each department to only see their department specific data.

Innovation: By the end of 2021, CPU established a centralized location where department leaders could quickly access data dashboards displayed on touch screen monitors or on their computers, igniting deeper data-driven discussions and decisions in real-time. The old model of “wait and see” was replaced with a system in which leaders sit at the table with the information they need at their fingertips, literally. Further, because it is web-based, the information can be accessed by anyone, with the appropriate permissions, from anywhere. As a result, the tool can be shared in virtual meetings, allowing for collaborative teams working in a hybrid environment. Leaders are now able to get the information they need when they need it. The data is accessible to decision-makers like never before.

Results: The response to this effort has been extraordinary. Put simply, the goal of creating a tool to access *better data*, to inform *better discussions*, resulting in *better decisions* has been met. The spending dashboards include, among other things: year-to-date numbers, historical numbers, revenue and expenditure detail by appropriation and fund type, sub funds, and general fund contributions. The staffing dashboards include, among other things: position details, diversity, salary, retirement, separations, new hires, and recruitments. After using the initial dashboards, we expanded to include risk management claims, workers compensation claims and department workload. The CPU team also worked with departments to create dashboards specific to their operational needs. One example of how this tool helped county leaders make better decisions is regarding employee retention. Like many jurisdictions, the County of Riverside saw the effects of the “Great Resignation” in Fiscal Year 2021/22. Using these dashboards, decision-makers moved past anecdotal experience and analyzed actual data to determine exactly who was leaving (job classification, tenure, age, etc.), which allowed leaders to move quickly to develop specific solutions. Before this tool, leaders may have been solving the wrong problem.

Replicability: The need to harness unwieldy data and put it to work exists in every jurisdiction. Interactive and intuitive dashboards are a quick, easy, and cost-effective way to do it. With the assistance of the County of Riverside Executive Office CPU, and access to online training videos (e.g. YouTube), success can be achieved across the state.

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Additional Materials: Demonstration video: <https://vimeo.com/745086519/20b1328089>