Designing Dashboards that Deliver

AGRiP Fall Educational Forum
October 1, 2018

TASB Risk Management Fund

Mission
The TASB Risk Management Fund provides comprehensive and responsive risk solutions supporting educational excellence in Texas public school districts and other public educational entities.

Fund Coverage

- Workers’ Compensation
- Property
- Auto Physical Damage / Auto Liability
- School Professional Legal Liability / General Liability
- Unemployment Compensation
- Privacy & Info Security

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Beginning our Data Journey

Problem:
- Disparate data sources and systems
- Manual work to present information on basic Fund stats
- Business Intelligence (BI) Tool but no capacity to release its potential
- Lots of data, but no time to analyze

Solution:
- Created Division of Strategic Initiatives and Operations Support (SIOS) in 2013
- Oversee data warehouse, internal and external BI Tools
- Works closely with, but not a part of IT
Today’s Goals

• **Review** dashboard case studies deployed in TASB Risk Management Services.

• **Understand** key concepts that made each dashboard successful and lessons learned along the way.

• **Leave with concepts** which help you confidently begin designing dashboards that deliver.

What is a dashboard?

A dashboard is a tool that:

1. Is simple to access, use, and refresh.

2. Provides information in a manner which supports decisions important to the business.
You Have to Start Somewhere: Risk Solutions Team Pilot

Risk Solutions Team Pilot
Development is Iterative: Risk Solutions Current Version
Round Two: Creating Collaborative Tools
Creating Collaborative Tools

**Dashboard Inventory**

<table>
<thead>
<tr>
<th>Topic</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>WC In Force Dashboard</td>
<td>Property Policy Overview</td>
</tr>
<tr>
<td></td>
<td>Weekly Large Reserve Change</td>
</tr>
<tr>
<td></td>
<td>Monthly Large Reserve Change</td>
</tr>
</tbody>
</table>

**Resources**

- TEA’s Campus Map

**Announcements**

**New Report Alert**

A new report has been added this month to the report inventory section.

All Lines Member History Report - This report contains Loss Ratios for all In Force policies. You have the ability to filter by Consultant, Member and/or LOR.

**New Data Section**

A new section to the ACCOUNT PROFILE page has been added:

Data Elements Added:
1. Count of WC claims created in the current month
2. Count of AP claims reported in the current month
3. Sum of all AP reserve changes in the current month
4. Sum of all WC reserve changes in the current month

Purpose:
Provides a mid-month summary of the new claims and reserve changes that will impact the next month-end data load.

**Open Report**

Click on the "Open Report" button for a detailed claim list with the default date being the first day of the current month. The "Claim Activity" report will allow you to select a different date.

Data in the dashboard is refreshed every evening and the report is refreshed when opened.

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**Account Profile Section**

**Select an Account**

- SSE Education 524
- BT-20 Education 324
- Abbott 120
- Allen ISD
- Aledo ISD
- Alief ISD
- Arlington ISD
- Aledo ISD
- Allen ISD
- Altus ISD
- Amarillo ISD
- Amarillo College
- Alpine Community College
- Allen ISD
- Aledo ISD
- Amarillo College
- Amarillo ISD
- Amarillo ISD

**About This Section**

The account profile section provides an overview for each eligible account. In this section, you will see data from the following sources:

- JMS Program Data
- Account Demographics
- IEP Public Data
- Claim Summary Data

Select an account on the left to proceed. The quick access reports below will provide you with data if the account has a history with JMS.

**Quick Access Reports**

- **Overall**
  - Member Policy History Report
- **AP**
  - Policy and Claim History Summary
- **WC**
  - Policy and Claim History Summary
- **Loss History Report - Current Fund Year**
- **Loss History Report - Insert Dates**
- **Other**
  - JMS Home Page

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Creating Collaborative Tools

ACCOUNT PROFILE

Academy ISD
Claim and Policy data as of Month-end

ACCOUNT INFORMATION (AMS)

Auto
9/3/2018

Liability
9/3/2018

Property
9/3/2018

WC
10/1/2018

MEMBERSHIP STATUS as of: 8/31/18

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Bringing it Together:
Analyzing Claim Quality and Load

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Now for Something Completely Different: Maps that Tell a Story

Maps that tell a story

Fiscal Year 2013
Maps that Tell a Story

Maps that Tell a Story
Lessons Learned

Establish an environment that nurtures Business Intelligence Development.

- Collaboration is key.
- Development is iterative.
- Create an atmosphere of trust and empathy.
- Develop metrics meaningful to your organization.
- Understand the origins of your data.

Lessons Learned

Develop the right team that can deliver your dashboard initiatives.

- You don’t need a data scientist. You need collaborators who know your business.
- Understand the role of IT in your data journey.
Lessons Learned

Consider the technology and support needs to meet your data consumption demands.

Technology tools are necessary, but shouldn’t be the driving factor in beginning your dashboard initiatives.

Lessons Learned

Successful dashboards do not happen overnight!!

- **2013-2015**
  - Establish SIQS division
  - Improve data quality and data understanding among staff
  - Cultivate trust in data and reports with business areas.

- **2015-2017**
  - Upgrade BI Tools and
  - Continue learning about dashboard tools and users
  - Refine dashboard tools for automating refresh

- **2017 – present**
  - Develop BI environments for users to easily navigate through all dashboards and reports developed for them
  - Continue evaluating dashboards
  - Enhance data security measures
Next steps for TASB

• Understanding how our current BI ecosystem fits with new technologies
• Using cloud-based technologies to speed up our data access
• Utilizing geographic information system (GIS) tools
• Expanding our member-facing reports to include benchmarking analyses

Dashboard Demonstration
Questions?

Thank you!

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