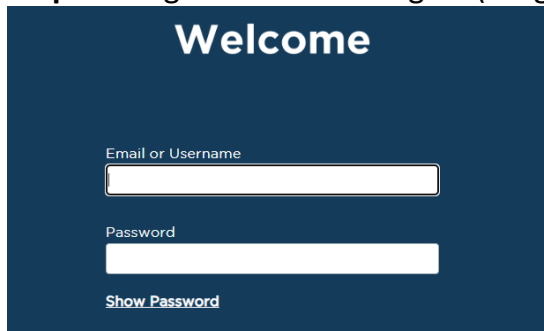


Service Insights on MealConnect (Neighbor Intake Program) **Quick Guide: Navigating Your Agency's Tableau Dashboard**

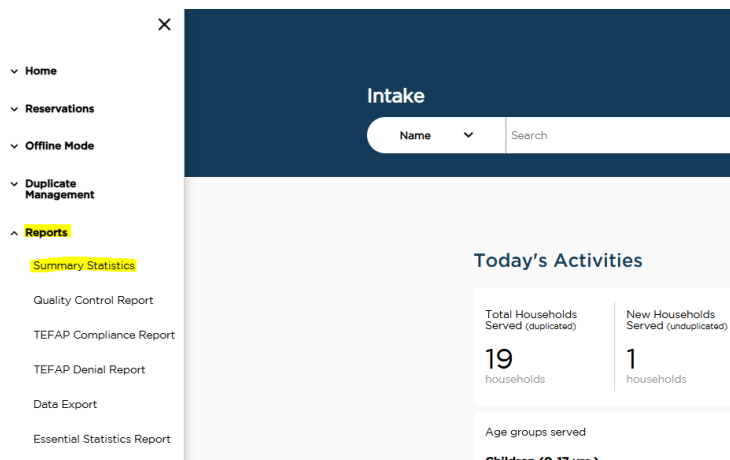
This is a quick guide to visualize your intake data in an easy-to-read graph format with all the different data breakdowns. It will show you the aggregated neighbor intake data on things such as age breakdowns, and no identifiable information from each neighbor will be shown. This can help you communicate the services you provide and their impact to donors or in writing for grants to get funding. Please see the end of this guide for tips on making the filtering process quicker and for examples of each dashboard.

To clarify the terms used in the dashboards, typically when we say “**unduplicated**” data, that means the count of unique individuals/households, and when we say “**duplicated**” data, it means the total count of individuals/households. For example, if two households visit your pantry twice a month, you would have served 4 households when looking at **duplicated** (total) data and served 2 households when looking at **unduplicated** (unique) data.

Step #1: Log into Service Insights (Neighbor Intake Program).



Step #2: Click the top left menu button and select “Summary Statistics”



Step #3: Choose the Summary Statistics view that you are most interested in. All views will be from aggregated data, meaning that no single neighbor’s personal information will be shown. A screenshot of each view will be at the end of this quick guide.

- a) Snapshot Overview shows total individuals and households served, visits, and active programs by month. You can filter the data, but it will require that the data input has been done following a strict guideline.
- b) Individual Demographics shows a breakdown of neighbors served by age, gender identity, and race or ethnicity. This could be helpful for grant writing and for informing donors.
- c) Core Household Characteristics shows households served, size, age composition, and government program participation. This could be helpful for grant writing and for informing donors.
- d) Other Household Characteristics shows household dietary factors, health, income, military status, and living situation.
- e) Service Trends include the households or individuals served each month, days of the week, weeks of the month, and time of the day. This could help make decisions on distribution time or frequency and food sourcing.
- f) Geographic Breakdown shows a map of where the neighbors are coming from.
- g) Agency Attributes show status, service types, and individuals and households served by all programs. This could be helpful when you have multiple programs that are not all food-related.

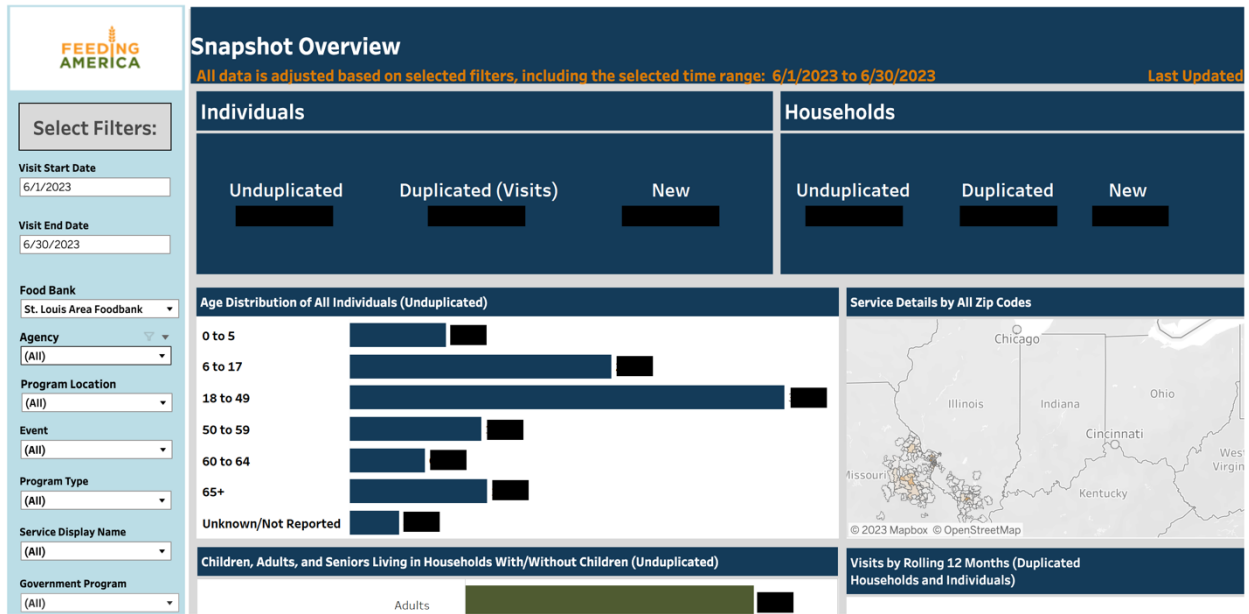
Once you have made it to the Summary Statistics page, click the button for the view you are interested in. A new tab should open on your browser. Please be patient as the new tab may take some time to load.

Summary Statistics

Upon clicking a report below, a new page will open in Tableau. This is a temporary function that will be improved in future versions of the application. Reminder: Tableau Reports will be unavailable to all users on Sundays from 5 - 8 pm CT due to weekly server maintenance.

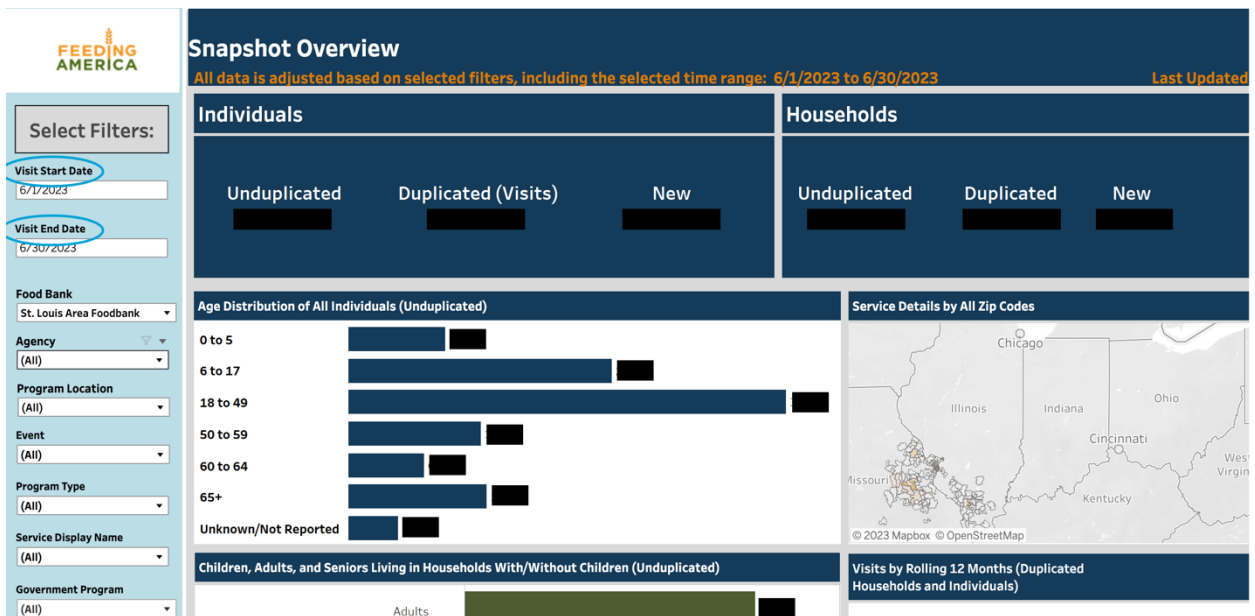
Report Name	Description
Snapshot Overview	Total individuals and households served, visits, and active programs by month
Individual Demographics	Individuals served by age, gender identity, and race or ethnicity
Core Household Characteristics	Households served, size, age composition, and government program participation
Other Household Characteristics	Household dietary factors, health, income, military status, living situation, etc.
Service Trends	Individuals and age groups served by week, month, and day.
Geographic Breakdown	Number of programs, events, individuals and household served for all zip codes and counties
Agency Attributes	Status, service types, and individuals and households served by all programs and agencies

Step #4: Understanding how to use the Tableau dashboard



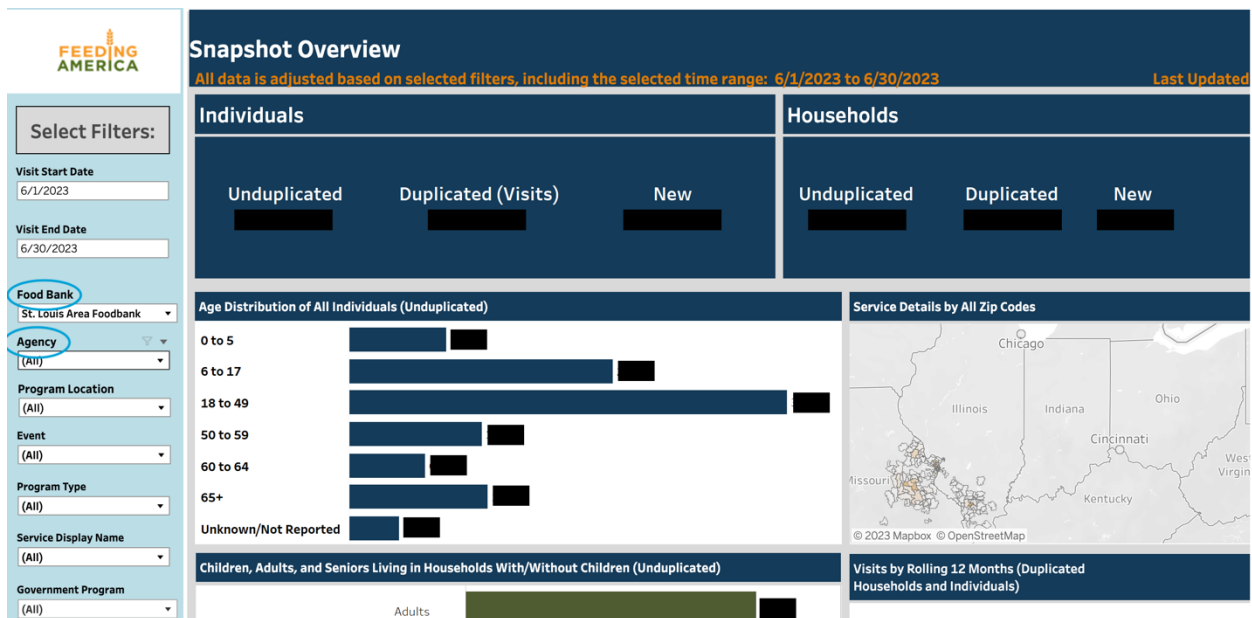
When you first open your Tableau Dashboard, it should look something like the example above. This Quick Guide will focus on how to use all the filters on the left, as well as why your agency may use them.

Start and End Dates



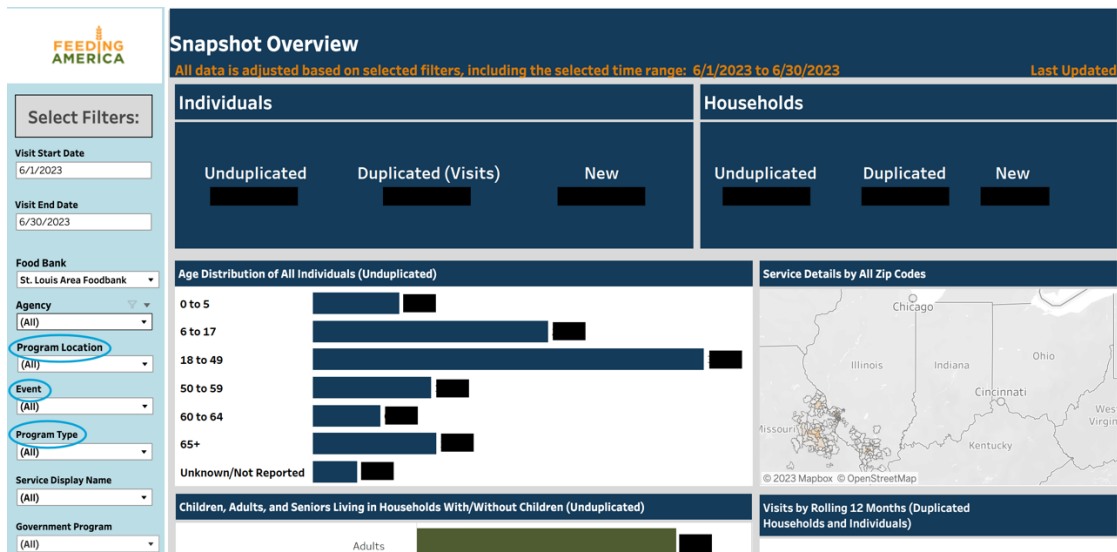
The first filter available is the start and end dates, seen in the blue circles in the example above. The start and end dates determine the time range the program should be pulling data from. Your dashboards will only show data that falls between those two dates. Click on the dates to change them as your agency finds necessary. For example, if you wanted to look at data from the past month, set the start date to the 1st of that month and the end date to the final day of that month. Another common use is to get annual data by setting the start day for January 1st and the end date for December 31st.

Food Bank and Agency



The following two filters are Food Bank and Agency, located in the blue circles in the example above. The Food Bank filter will only provide the option of St. Louis Area Foodbank, as that is the food bank that your agency is a part of. The Agency filter will only provide the option of your agency. Neither one of these filters is changeable.

Program Location, Event, and Program Type



The next filters are program location, event, and program type, located in the blue circles above. The program location will give you all the geographical locations where your agency does distributions. This filter is only relevant if your pantry has or operates out of multiple different buildings. If this were the case, you could use this filter to see data from just one location, being able to compare differences in the number of people served and demographics of people served between multiple locations.

The next filter is event, which will give you options for all of your agency's distribution events. For example, your agency might do a weekly distribution every Thursday night but also do a monthly distribution on the first Sunday of every month. Both of those would be listed under the event filter. You could use this filter to see data from just one event, being able to compare differences in the number of people served and the demographics of people served between your agency's different events.

The final filter here is program type. This is only relevant if your agency hosts multiple different programs, such as regular food pantries and clothing drives. You could use this filter to see data from just one program, being able to compare differences in the number of people served and demographics of people served between your agency's different programs.

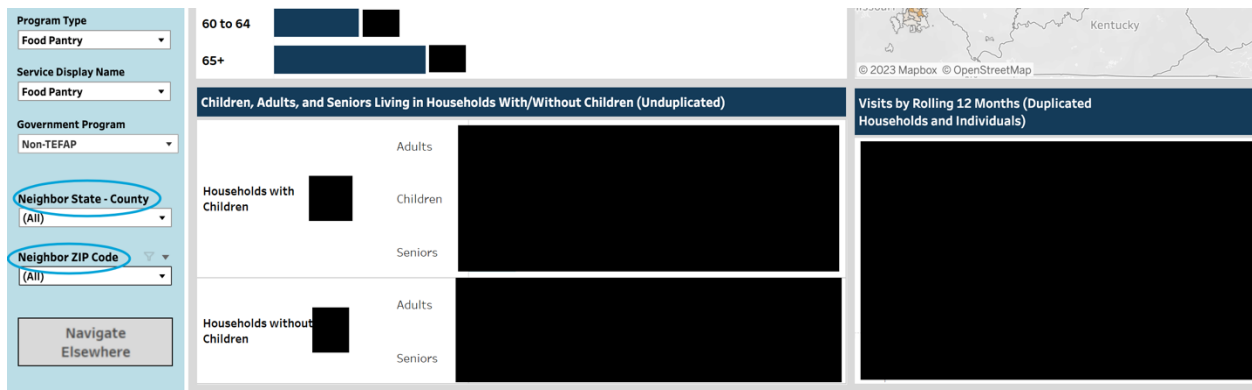
NOTE: The options for all three of these programs will only appear if you have entered them specifically earlier on in the Neighbor Intake Program. If you have questions on how to do this, contact your Service Insights Project Coordinator for more information.

Government Program



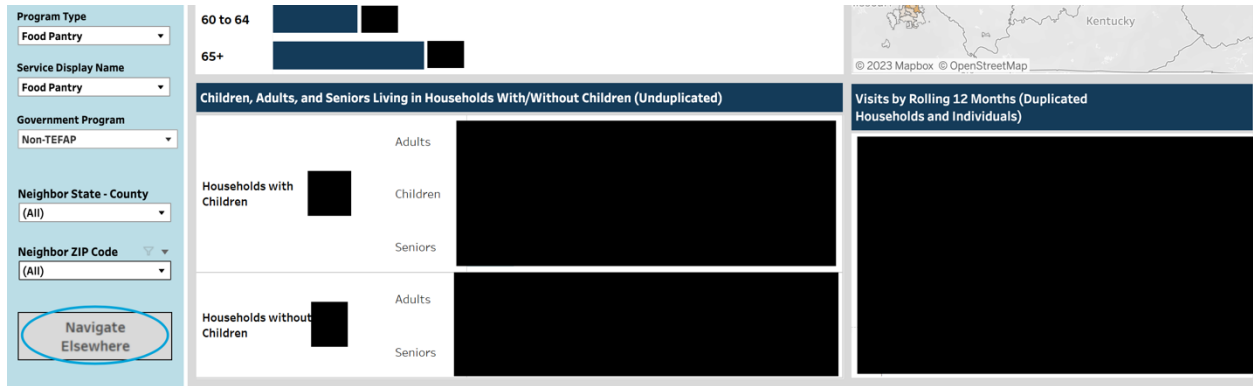
The next filter is the Government Program. This filter is only relevant if you are engaging in government programs, such as TEFAP or CSFP. If this is the case, this filter can be incredibly useful, as you can view the data of only the clients receiving government food. This can be helpful if your agency is audited, if you are applying for a grant, or for any other reason why the government might want to look at the data of just those engaging in government programs.

County and Zip Codes



The final two filters here are labeled Neighbor State – County and Neighbor ZIP Code, and these narrow down the geographical region which the data is being pulled. Your agency would use Neighbor State – County to look at data of clients from one specific county and use Neighbor ZIP code to see all the data about all clients you serve from that ZIP code. This can be helpful as it tells you what areas have the most need and can allow your agency to know where you should be expanding your outreach.

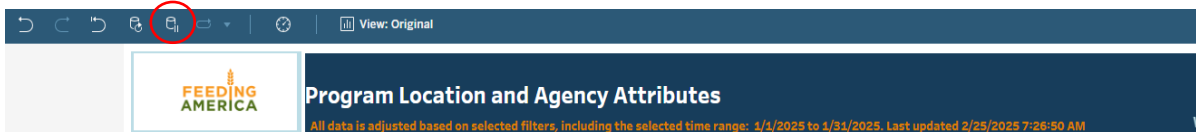
Navigating Other Dashboards



The final button on the left says Navigate Elsewhere. This will pop up with a variety of other dashboards that all provide different pieces of information. Each of these dashboards will have the same filters on the left.

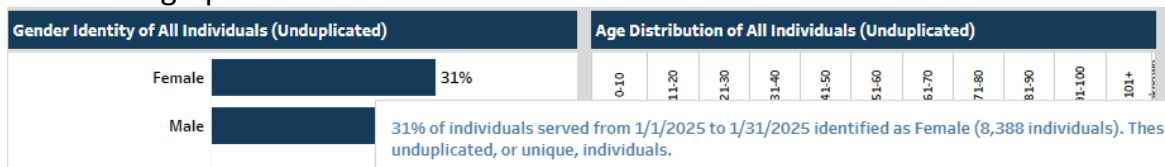
Making filtering quicker

Because we are working with a large set of data, the dashboards can be slow to update. If you find yourself utilizing the tool often and are frustrated with the speed, you can pause the auto-update function that makes the dashboard update after each change you make on the filter. Click on the “Pause auto updates” button at the top right part of the screen (see below), make the changes to the filter, and then click on the same button to “Resume auto updates.”



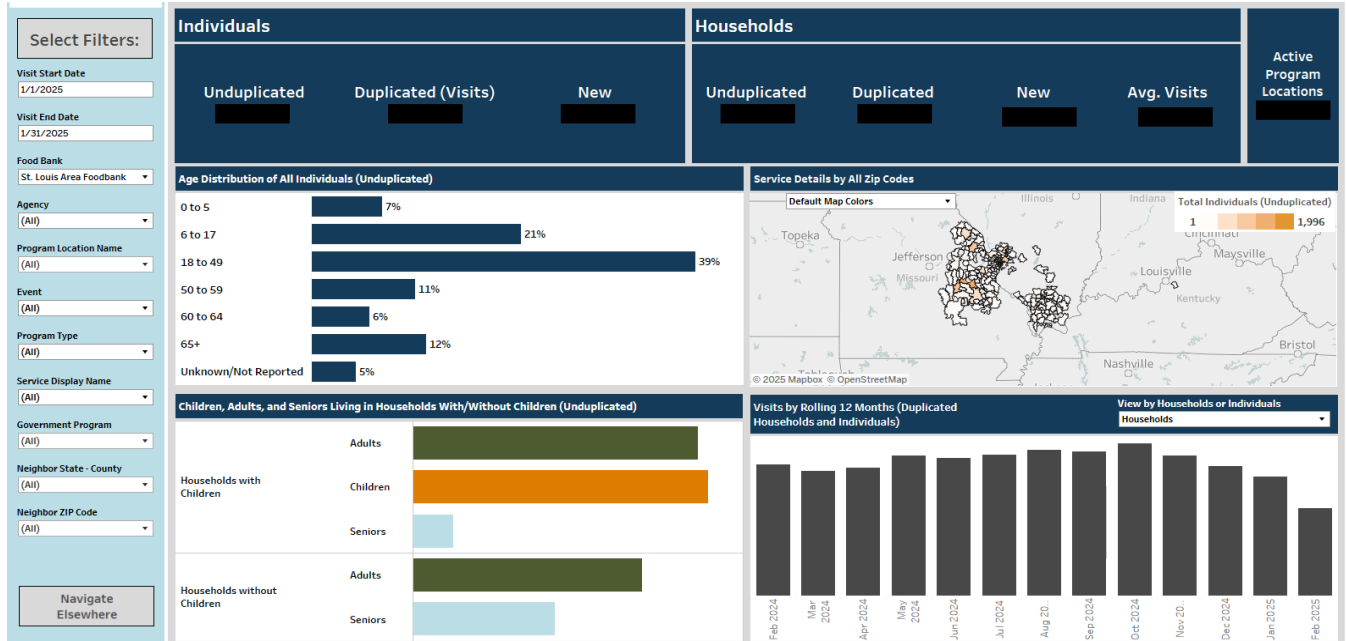
Getting the numbers for each bar graph with percentages on it

For the bar graphs that only show the percentage rather than the number, you can put your mouse cursor over the bar or the percent value, and it will show the exact number for the data. In the example below, my cursor was over the graph corresponding to the bar on the graph labeled “Female.”

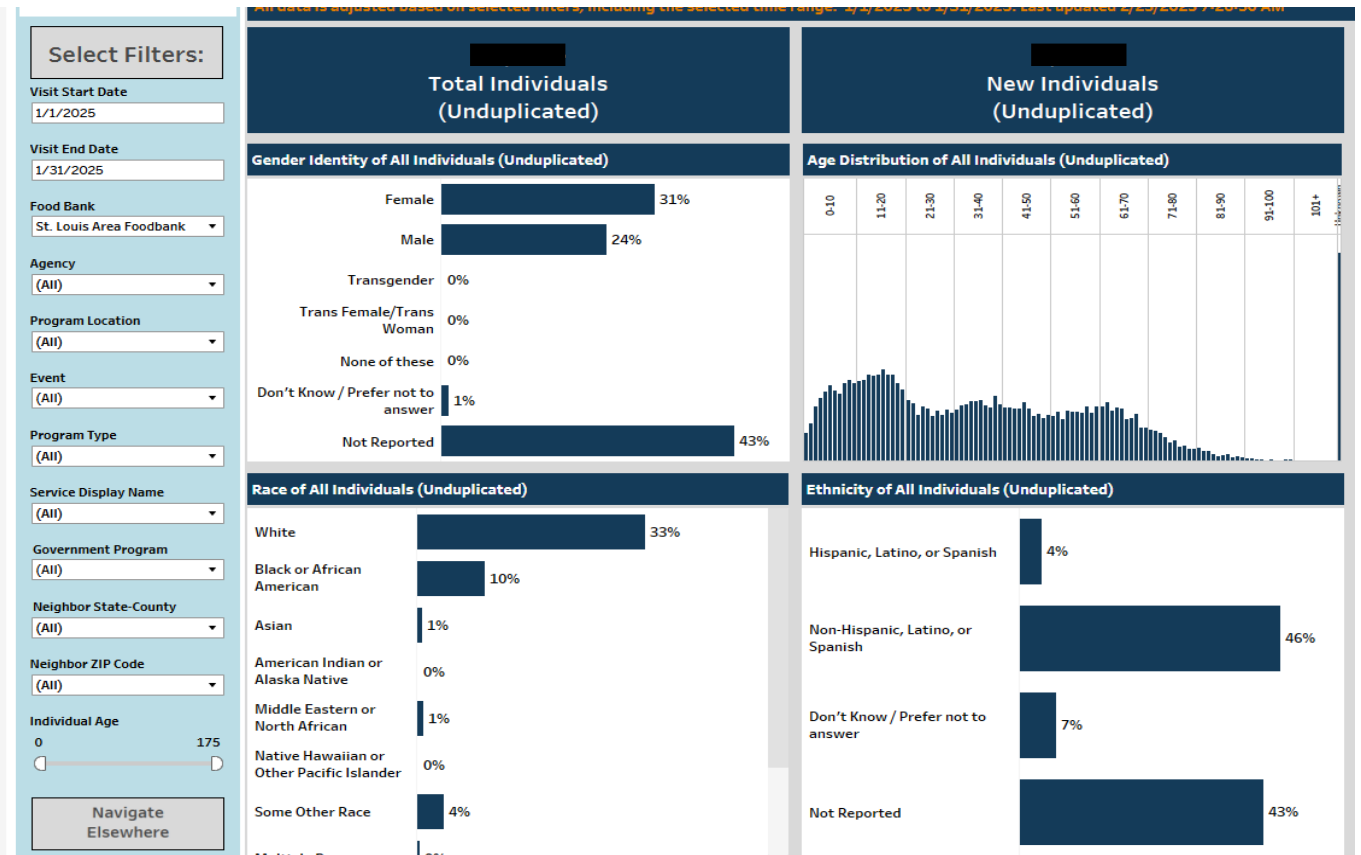


Example of each dashboard views

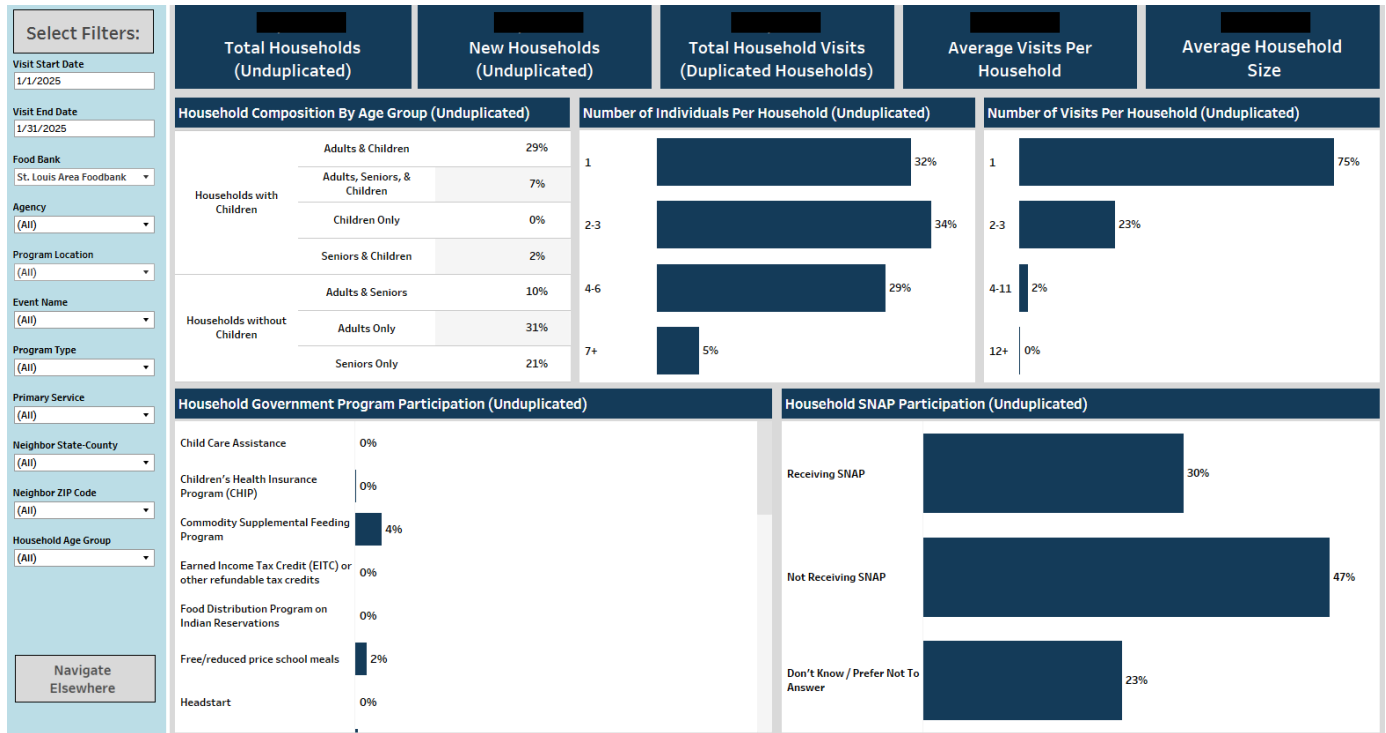
Snapshot Overview



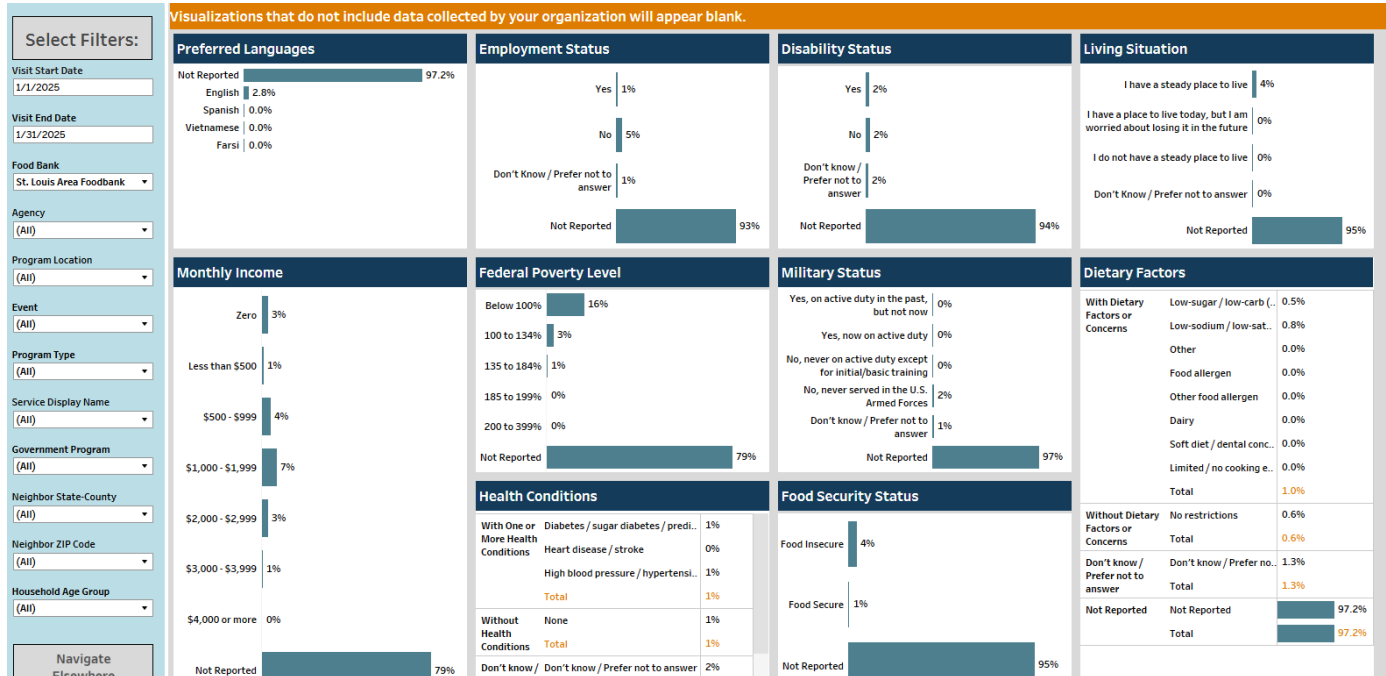
Individual Demographics



Core Household Characteristics



Other Household Characteristics



Service Trends

