


Drawing Insights from Strategic Plan Overview PowerBI reports

<https://www.ucmo.edu/about/strategic-plan/>


Report 1 – Activity reporting

1. Use this report to filter by Strategic Plan Goal or Objective
2. Use this report to filter to specific units
3. Use this report to filter activities by status – click on the colored portion of the donut chart to change the data displayed in the table
4. Zoom into the table clicking on the expansion  icon in the upper right-hand corner of the table.
5. In the table, you can sort alphabetically by clicking on the column. For example, click on the Unit column to sort units alphabetically.

How would a leader use these data?

1. Gap Analysis – opportunities for new activities (or existing activities that are not being captured) may reveal themselves
2. Discussion Items with Direct Reports – viewing a unit’s activities for the current year can be used in annual unit reviews as a reflective discussion point. Can help a unit manager better understand how their activities contribute to the university strategic plan. There may be opportunities to focus and refine activities for the future.


Report 2 – Estimated Cost Reporting by Objective

1. Use this report to filter by Strategic Plan Goal or Objective
2. Use this report to filter to specific units
3. Use this report to filter activities by status
4. Click on the colored horizontal bar on the chart to populate the table with the total estimated cost for that objective.
5. Zoom into the table clicking on the expansion  icon in the upper right-hand corner of the table.

How would a leader use these data?

1. Estimated Cost Analysis – visually compare proposed expenditures by objective. Identify mapping duplicates. Use this lens to drill down further into objectives on Report #1 to inform discussion with direct reports on planning for the next budget cycle. Filtering by “Completed” status can help inform discussions.

Report 3 – Estimated Cost Reporting by Results (Actual Expenditures)

1. Use this report to filter by Strategic Plan Goal or Objective
2. Use this report to filter to specific units
3. Use this report to filter activities by report period (e.g. 2022-2023 January)
4. Click on the colored horizontal bar on the chart to populate the table with activities by status (e.g. Completed)
5. Zoom into the table clicking on the expansion  icon in the upper right-hand corner of the table.

How would a leader use these data?

1. This table reports on Updates to Activities. Remember that there are three update periods in each academic year. A leader may be interested in seeing how many activities have been reported as completed compared to the prior reporting period and which activities are still being reported as in progress.
2. These data may be helpful for mid and end of year conversations with managers about the progress made on activities proposed at the beginning of the year.