Dashboards can help you move from counting outputs, to telling compelling stories. But before you create one full of pretty charts, take a moment to create a messaging strategy. Use this worksheet to help build an influential dashboard.

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| Who Cares? List the stakeholders that are invested in your program. Include anyone that might benefit.  | * Funders
* Homebuyer Applicants
* Board Members
* Donors
* Staff of Local Government Agencies
* City Council Members
* State and Congressional legislators
* Program Director
* Lenders
 |
| Who do you want to share information with?Pick one of the stakeholders you listed above to focus on. Understanding the interests of your target audience will help you create a high impact dashboard.  | *We want to share compelling, data-driven stories with:*  |
| What decisions are they making?Will they fund your program? Change local policies? Encourage friends to apply?  | *So that they can determine.....* |
| What do they need to see, hear or know in order to act or make a decision?What information do you have that will help them make a decision? What statements do you want to be able to make?  | *They will be most inclined to act if we can say...* |
| What are the data points behind these statements |  *To back up these statements, we need to know:*  |
| How will you collect the data?  | *To systematically collect this data, we need to:* |
| How will you present the information in a dashboard?Will it be an excel chart, or a HomeKeeper or Salesforce dashboard? How will you keep it current? | *We will share this information by:*  |

EXAMPLE

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| --- | --- |
| Who do you want to share information with? | *We want to share compelling, data-driven stories with* ***potential applicants***  |
| What decisions are they making? | *So that they can determine* ***if* the program is a good fit with their expectations and whether or not to to apply.**  |
| What do they need to see, hear or know in order to act or make a decision? | *They will be most inclined to act if we can say:* * ***Our homes are affordably priced and are typically at least 25% lower than the market value.***
* ***Over 95% of homeowners that have sold have rated the program good or very good.***
 |
| What are the data points behind these statements |  *In order to back up these statements with data, we need to know...* * ***The market rate values of the home at the time of purchase.***
* ***The affordable sales price.***
* ***Program satisfaction feedback from outgoing sellers.***
 |
| How will you collect the data?  | *In order to systematically collect this data, we will need to…** ***Collect copies of lender appraisals and record unrestricted market value.***
* ***Obtain a copy of the final closing statement and document the affordable price.***
* ***Administer an exit survey for sellers and track responses.***
* ***Take screenshots of the*** [***Social Impact Dashboard***](http://myhomekeeper.org/why-homekeeper/the-homekeeper-national-data-hub) ***showing typical discounts relative to the market.***
 |
| How will you present the information?Will it be a HomeKeeper or Salesforce dashboard? Will you use an infographic using Infogram ( <https://infogr.am> ) or Canva (<https://www.canva.com/> ) ? | *We will share this information by:* * ***Creating an internal dashboard to inform our messaging and communications with potential applicants.***
* ***Sharing affordability charts comparing the program to the market with applicants***

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