

Connecting Departments to University Expenditures Using a Spend Dashboard

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July 16, 2016





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There's A Gap Here.



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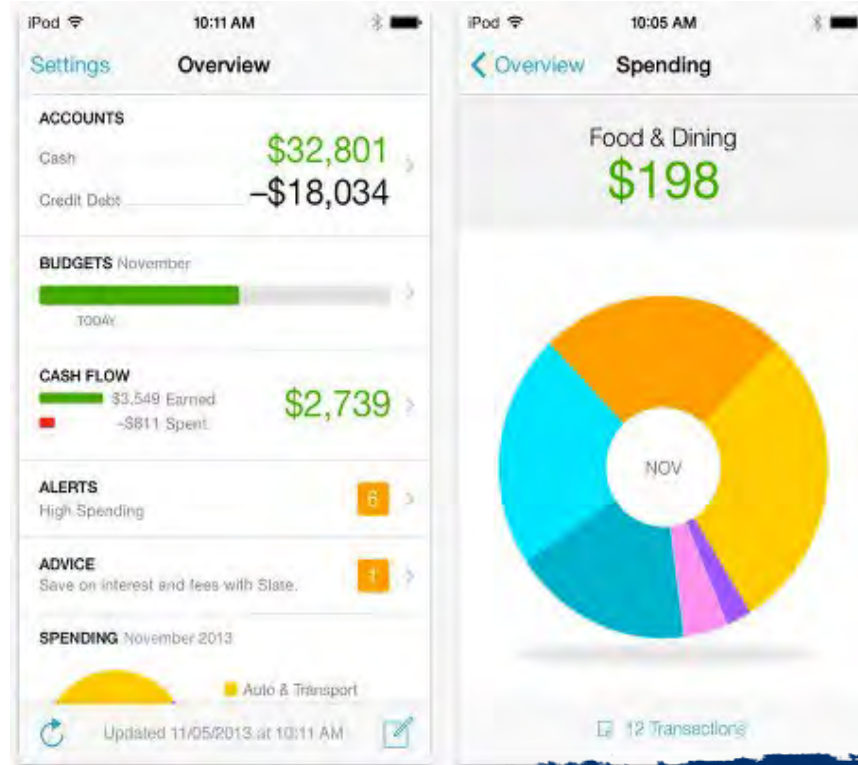
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R
1	Teacher Num	MBU	Expenditure Type	By Org	Period	Vendor	Action	Transaction	PO Number	Vendor Name	Transferred Date	Expenditure Item	Dept Org Name	Carrying Out	Object Number	Project Name	Cmt Num	SumOfExpense
2	3075839	PV-Vice	Travel	31010 PV-	Sep-14	THOMAS,	AP	Vchr:307		THOMAS,	9/12/2014	9/11/2014	PV-	31010 PV-	132971	PV-ISO	AMK3R	\$30,463.05
3	3232261	PV-Vice	Travel	31010 PV-	Aug-15	CHU,	AP	Vchr:323		CHU,	8/14/2015	8/13/2015	PV-	31010 PV-	132978	PV-ISO	AMK3R	\$26,883.05
4	3140835	PV-Vice	Travel	31010 PV-	Feb-15	SNYDER,	AP	Vchr:314		SNYDER,	2/3/2015	2/2/2015	PV-	31010 PV-	132959	PV-ISO St	AMK3R	\$26,476.05
5	3069042	PV-Vice	Travel	31010 PV-	Aug-14	LIANG,	AP	Vchr:306		LIANG,	8/27/2014	8/26/2014	PV-	31010 PV-	132978	PV-ISO	ALF3N26	\$22,964.66
6	3261922	PV-Vice	Travel	31010 PV-	Oct-15	HORNE,	AP	Vchr:326		HORNE,	#####	10/21/2015	PV-	31010 PV-	132768	PV-ISO	AMK3R	\$22,272.49
7	3240911	PV-Vice	Travel	31010 PV-	Sep-15	COLVIN,	AP	Vchr:324		COLVIN,	9/8/2015	9/3/2015	PV-	31010 PV-	141918	PV-ISO	TJ5A 03-	\$21,956.37
8	3100089	PV-Vice	Travel	31010 PV-	Nov-14	LAUGHLI	AP	Vchr:310		LAUGHLI	11/3/2014	10/30/2014	PV-	31010 PV-	141905	PV-ISO	TJ5A 30-	\$21,669.24
9	3242716	PV-Vice	Travel	31010 PV-	Sep-15	LI,	AP	Vchr:324		LI,	9/9/2015	9/8/2015	PV-	31010 PV-	132961	PV-ISO	TJ5A 08-	\$20,679.97
10	3139232	PV-Vice	Travel	31010 PV-	Jan-15	BAILO	AP	Vchr:313		BAILO	1/29/2015	1/29/2015	PV-	31010 PV-	142731	PV-ISO	ALF3N29J	\$20,059.23
11	3107070	PV-Vice	Travel	31010 PV-	Nov-14	HORNE,	AP	Vchr:310		HORNE,	#####	11/12/2014	PV-	31010 PV-	132768	PV-ISO	ALF#N12	\$17,620.57
12	3043236	PV-Vice	Travel	31010 PV-	Jul-14	ELZEY,	AP	Vchr:304		ELZEY,	7/3/2014	7/1/2014	PV-	31010 PV-	134861	PV-ISO	TJ5A 01-	\$17,305.63
13	3214845	PV-Vice	Travel	31010 PV-	Jul-15	ELZEY,	AP	Vchr:321		ELZEY,	7/8/2015	7/6/2015	PV-	31010 PV-	132980	PV-ISO	TJ5A 06-	\$16,578.73
14	3096469	PV-Vice	Travel	31010 PV-	Oct-14	BARGAC	AP	Vchr:309		BARGAC	#####	10/23/2014	PV-	31010 PV-	132974	PV-ISO	TJ5A 23-	\$16,500.08
15	3077171	PV-Vice	Travel	31010 PV-	Sep-14	LEVENSO	AP	Vchr:307		LEVENSO	9/16/2014	9/15/2014	PV-	31010 PV-	132970	PV-ISO	ALF3N15	\$14,712.79
16	3069541	PV-Vice	Travel	31010 PV-	Aug-14	COLVIN,	AP	Vchr:306		COLVIN,	8/29/2014	8/27/2014	PV-	31010 PV-	141918	PV-ISO	TJ5A 27-	\$12,336.61
17	3161425	PV-Vice	Travel	31010 PV-	Mar-15	ILSEMAN	AP	Vchr:316		ILSEMAN	3/19/2015	3/19/2015	PV-	31010 PV-	132953	PV-ISO	AMK3R	\$12,200.53
18	3077661	PV-Vice	Travel	31010 PV-	Sep-14	POLANZ,	AP	Vchr:307		POLANZ,	9/16/2014	9/15/2014	PV-	31010 PV-	132768	PV-ISO	TJ5A 15-	\$11,653.36
19	3076111	PV-Vice	Travel	31010 PV-	Sep-14	MAXHAM	AP	Vchr:307		MAXHAM	9/12/2014	9/11/2014	PV-	31010 PV-	132964	PV-ISO	TJ5A 11-	\$11,046.93
20	3214655	PV-Vice	Travel	31010 PV-	Jul-15	MOOMA	AP	Vchr:321		MOOMA	7/14/2015	7/6/2015	PV-	31010 PV-	134855	PV-ISO	AMK3R	\$10,843.54

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What's the Big Picture??

What's The Ideal?



What's The Ideal?

- Units are connected to spending **at a meta level**
- Units are connected to **University-wide initiatives**
- Units gain the ability to **answer their own questions**
- Procurement is seen as a **valuable partner in driving savings**

Metrics That Matter

- Who is your audience?
- What do they care about?
- What answers their questions?
- What prompts behavioral change?
- What change can they affect?

How Can You Help?

Sample Metrics

Use These:

- Diverse Business Spend
- Spend by Category/Sub- Category
- Contract/Managed Spend
- Strategic Contract Usage
- Top Suppliers
- Spend by Type of Purchase*
- Spend by Unit
- Other University-wide Goals

Not These:

- Technical Information
- AP Information*
- e-Procurement Statistics
- E-invoicing or Receiving Statistics
- Buyer req-to-PO time*

Your Turn!

Identify audience, and develop 1 good metric and 1 bad metric for:

- Group 1: Budget Office
- Group 2: Facilities Utilities Division
- Group 3: Dining Services
- Group 4: Grants/Sponsored Programs

Getting Vizzy With It

The way you visualize your data is important.

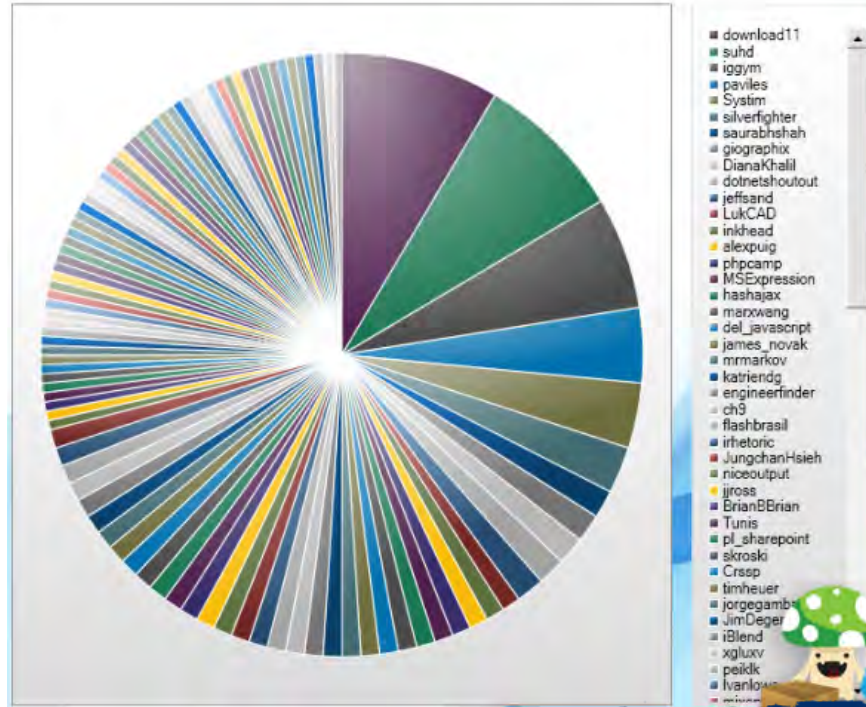
Getting Vizzy With It

Consider:

- **Choice of chart**
- White space
- Modern, accessible coloring
- Point out what's important
- Tell them how you can help

Getting Vizzy With It

100 Most Active Tweeters



[Source](#)

Getting Vizzy With It

In General:

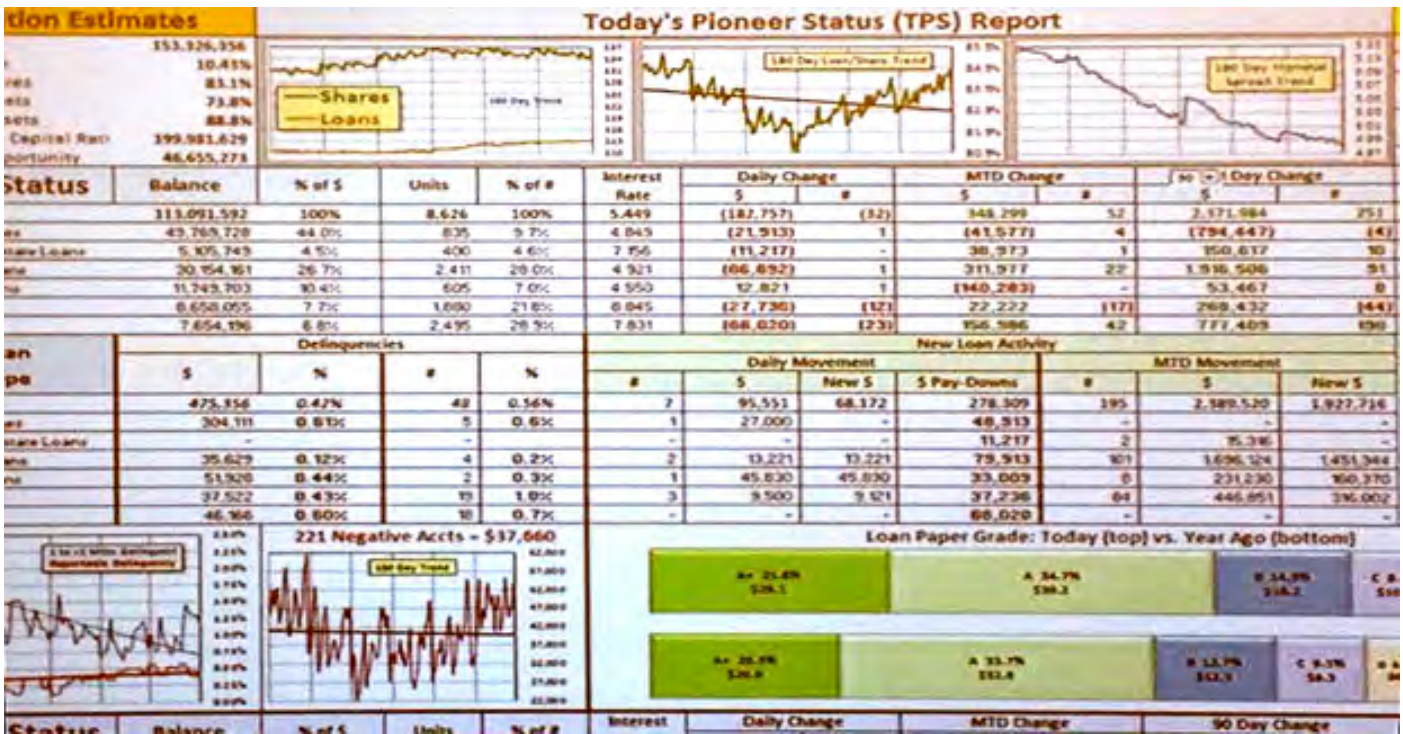
- **Bar Chart** – comparing measures across categories
 - Ex: Spend by Top 5 departments
- **Line Chart** – trends over time
 - Ex: Spend by 1 department by quarter
- **Pie Chart** – proportions*
 - Ex: % Spend with Top 5 vendors

Getting Vizzy With It

Consider:

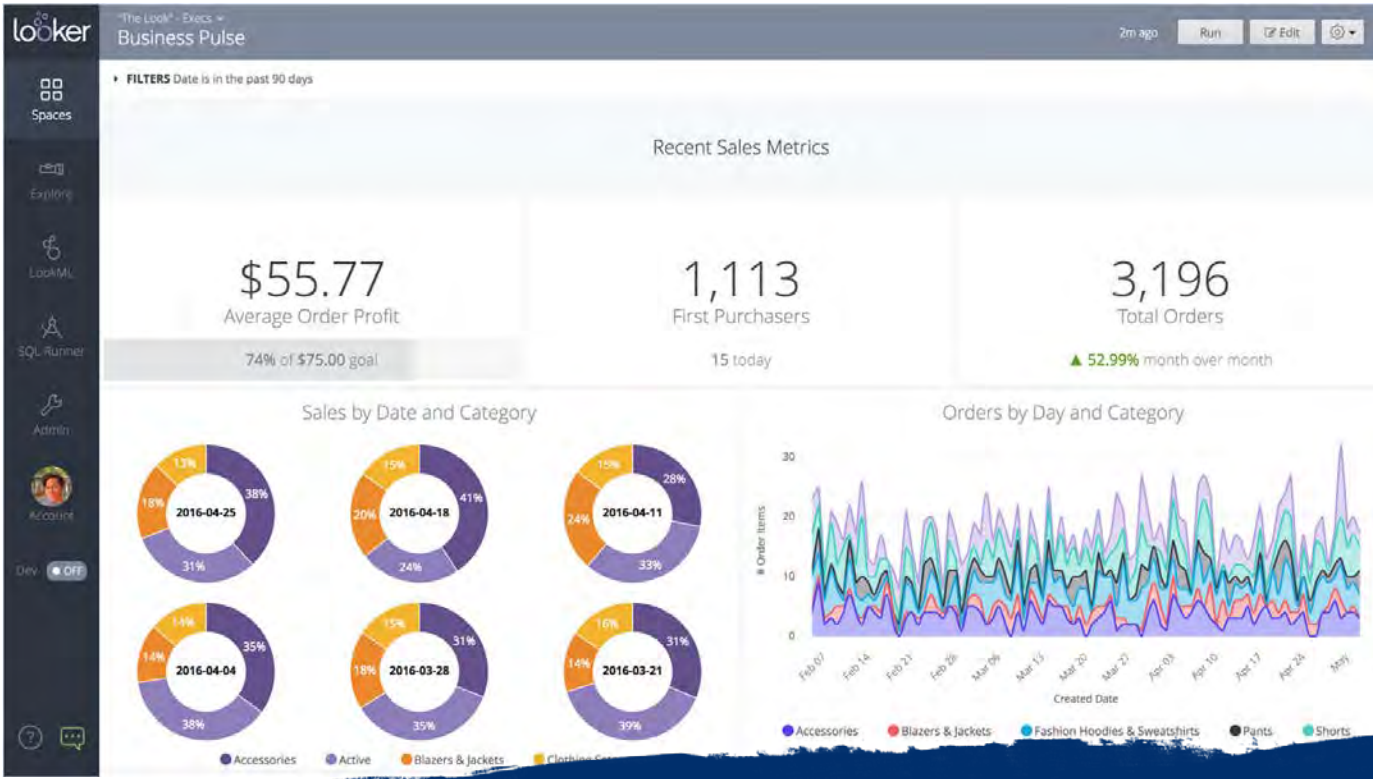
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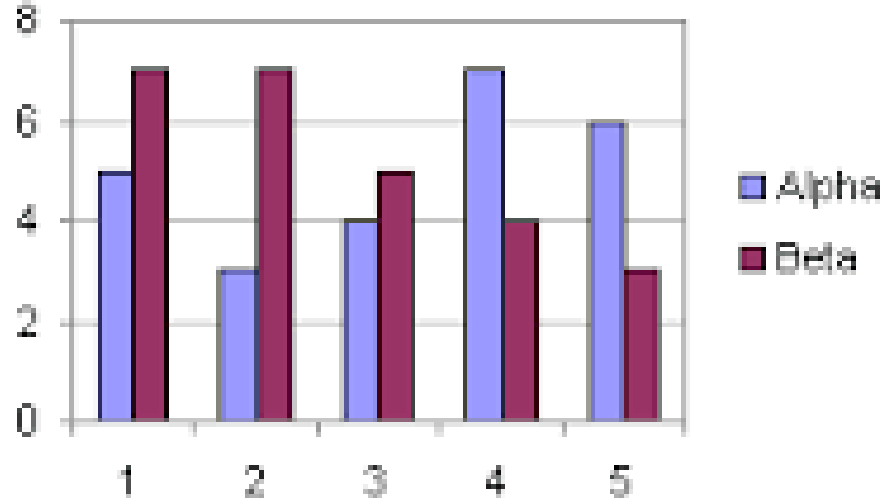
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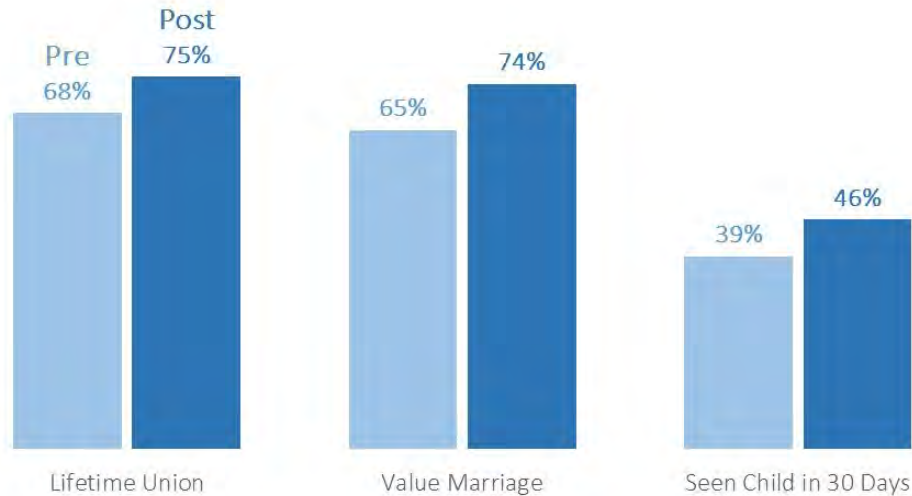
Getting Vizzy With It



Getting Vizzy With It

Fathers showed an **increased commitment to families**

Source: 2010 pre- and post-RIDGE data



Source

Getting Vizzy With It

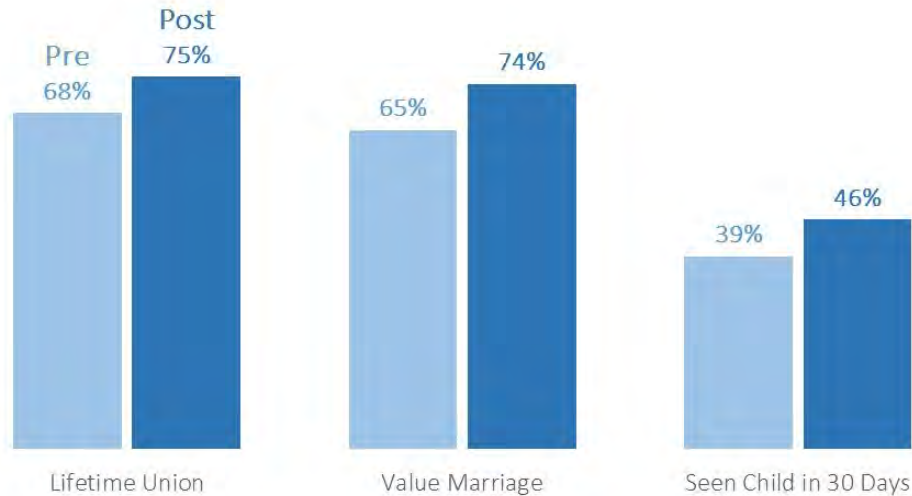
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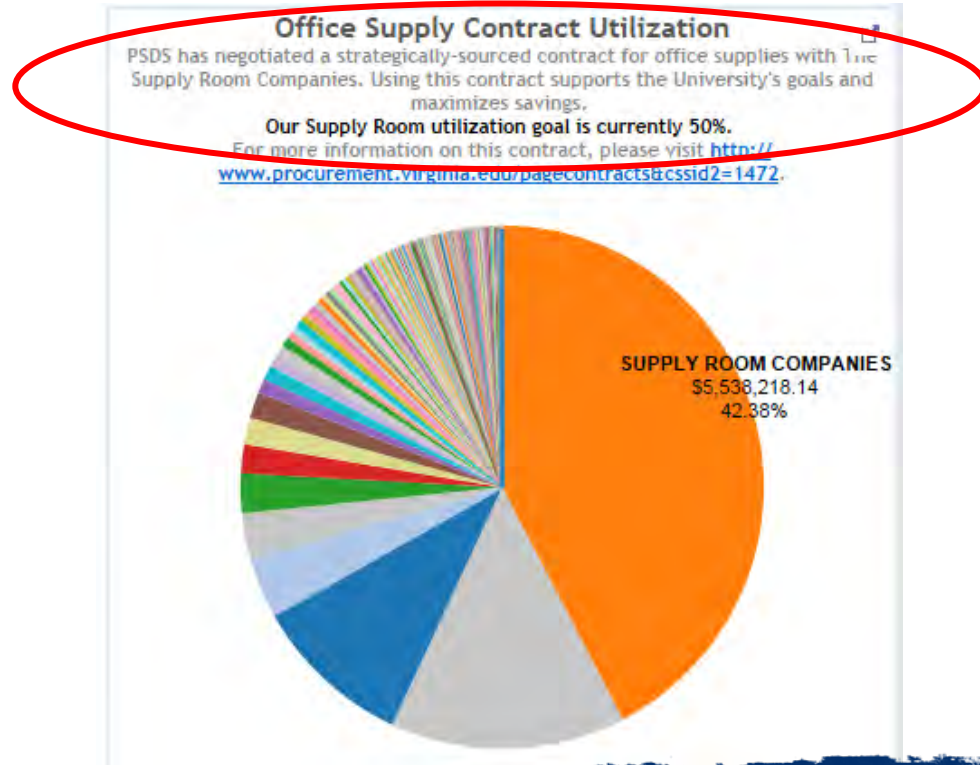
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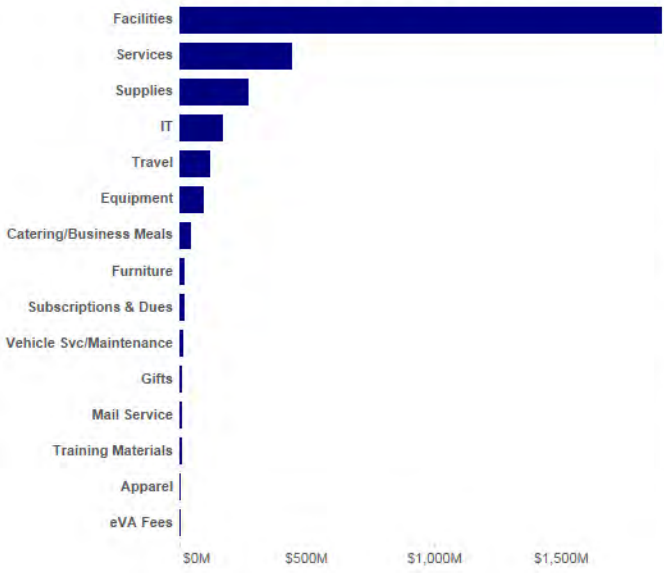
UVA's Dashboard

UVa Spend Dashboard

Providing partnership and valuable insights into departmental spending in order to enable more strategic business decisions
 For How-To's, Tips, and to Make Suggestions, visit <http://bit.ly/DashboardCollab>

Top 15 Spend Categories

Click on a category (or CTRL+Click for multiple categories) to drill down data for the rest of the dashboard. You can also use the filters below to filter the data.



Top 15 Vendors

PSDS can help to set up contracts and consolidate spend with fewer vendors

Vendor Name	Contract Vendor	Amount (\$)
DOMINION VIRGINIA POWER	No	\$70,154,325.94
DONLEYS LLC	No	\$43,458,150.29
CITY OF CHARLOTTESVILLE	No	\$36,199,157.44
WHITING-TURNER CONTRACTING CO.,	No	\$34,223,984.50
COMMONWEALTH OF VIRGINIA	No	\$31,003,616.80
PERKINS & WILL VIRGINIA INC	No	\$29,475,256.46
DONLEYS/MCCARTHY, A JOIN.,	No	\$28,854,284.69
QUESENBERRYS INC	No	\$23,187,567.42
BARTON MALOW COMPANY	No	\$22,497,957.28
MARTIN HORN INC	No	\$20,715,930.81
APPLE COMPUTER INC	Yes	\$19,240,167.34
DELL MARKETING LP	Yes	\$18,336,283.44
SKANSKA INC	No	\$18,191,760.37
FAULCONER CONSTRUCTION CO.,	No	\$16,944,813.58
SCOTT KRONER PLC	No	\$16,199,900.62

Source



<https://virginia.box.com/v/NCCIDashboard>

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