Project Tracking Dashboard

The Project Tracking Dashboard provides information on previously funded CFA Projects. This interactive tool allows for summarization and analysis of all project data. It contains four tabs:

Top Level Stats: Summarizes high level figures for:
- Total Dollars Awarded: Sums the original "Award Amount" for all projects from the Appendix tab.
- Total Leveraged Dollars: Sums the "Total Project Cost" for all projects from the Appendix tab. ESD "combination" projects are only summed once (In certain instances, a project can receive more than one type of ESD assistance. For example, a project may have a grant element and an Excelsior Jobs Program tax credit element. In such circumstances, each funding-type will appear as its own project, but total project cost is only summed once to avoid double counting).
- Awards Made: Total count of all projects (rows) from the Appendix tab.
- Jobs Created or Retained: Sums "Jobs Created" and "Jobs Retained" associated with each project. ESD "combination" projects are only summed once (In certain instances, a project can receive more than one type of ESD assistance. For example, a project may have a grant element and an Excelsior Jobs Program tax credit element. In such circumstances, each funding-type will appear as its own project, but job figures are only summed once to avoid double counting). Note: Only a subset of projects included in the dataset are subject to job creation and retention requirements.
- Projects by Status: Total count of all projects (rows) by CFA Project Status from the Appendix tab.
- Total Funding by County: Sums the original "Award Amount" field by "County" for all projects from the Appendix tab.
- Round: A filter for the Regional Council "Round" from the Appendix tab.
- Priority Project: A filter to include only those projects listed as a "Priority" from the Appendix tab.
- ESD Only: A filter to include only projects listed as "ESD" from the "Agency" field in the "Appendix" tab.
- Exclude Terminated: A filter to remove any projects listed as "Black" (Cancelled/Declined/Terminated) from "Status" in the Appendix.
- Data Last Refreshed: The date the data was last refreshed/updated. Updates will happen quarterly.

Investments & Jobs: Includes charts and visualizations for total number of awards, funding levels, and jobs created/retained by round and status. Also includes several filters that can be applied: County, Agency, and Priority Project.

Ratio of Leveraged Dollars:
- Round: A filter for the Regional Council "Round" from the Appendix tab.
- # Of Projects: Total count of all projects (rows) from the Appendix tab.
- Total Project Cost: Sums the "Total Project Cost" (Total Leveraged Dollars) for all projects from the Appendix tab. ESD "combination" projects are only summed once (In certain instances, a project can receive more than one type of ESD assistance. For example, a project may have a grant element and an Excelsior Jobs Program tax

credit element. In such circumstances, each funding-type will appear as its own project, but total project cost is only summed once to avoid double counting).

- Total Original Award Amount: Sums the "Award Amount" field from the Appendix tab.
- Leverage Ratio: The leverage ratio is calculated by dividing the "Award Amount" by the "Total Original Award Amount" fields from the Appendix tab.

Note: This chart excludes terminated (black status) projects.

Project Status by Round: Total count of all projects (rows) by "Status" and "Round" from the Appendix tab.

Projected Jobs Retained and Created by Round: Sums "Jobs Created" and "Jobs Retained" fields associated with each project (totals in top cards, by round in lower chart). ESD "combination" projects are only summed once (In certain instances, a project can receive more than one type of ESD assistance. For example, a project may have a grant element and an Excelsior Jobs Program tax credit element. In such circumstances, each funding-type will appear as its own project, but job figures are only summed once to avoid double counting). Note: Only a subset of projects included in the dataset are subject to job creation and retention requirements.

Note: This chart excludes terminated (black status) projects.

Map: A map of all the projects. The color represents the "Project Status", and if click on a specific project, the table below will filter for information for that project. Also includes several filters that can be applied: Status, Agency, Priority, and Round. There is also a search function for Applicant and Project Name.
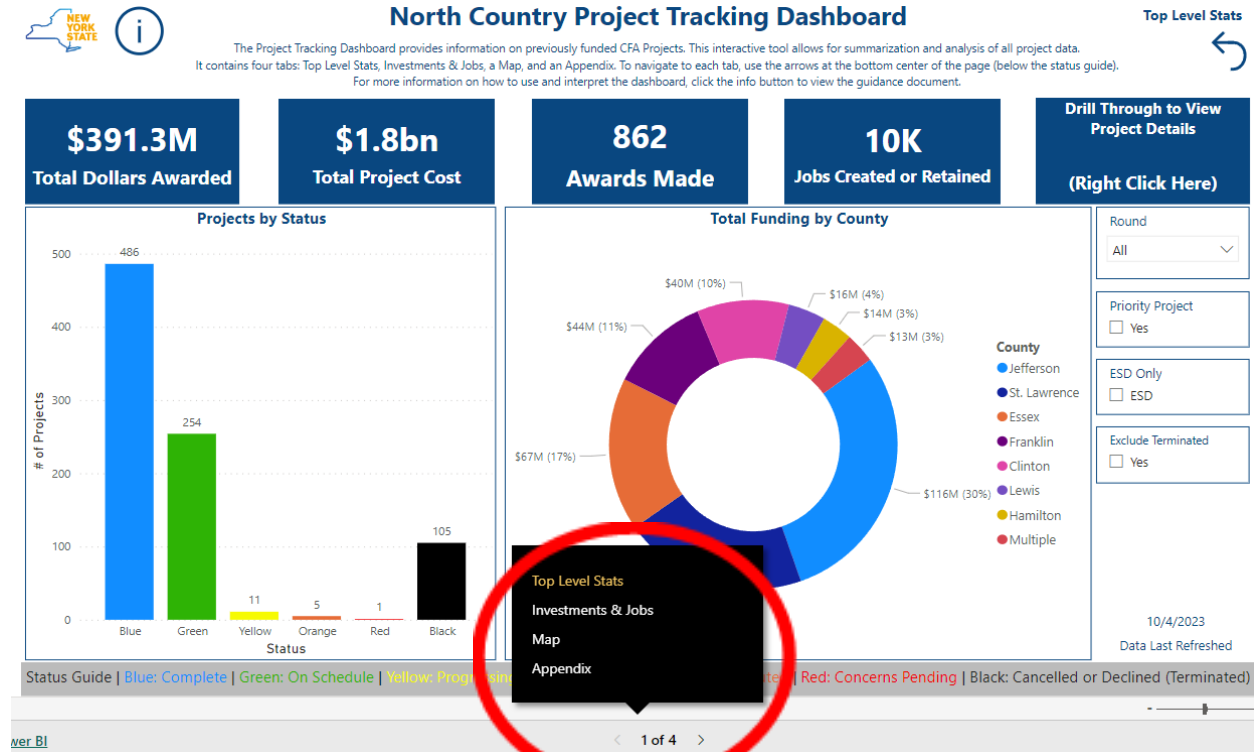
Appendix: A full list of all previously funded projects included as part of Regional Project Tracking. It includes several fields that make up the "source data" used throughout the other tabs of the Project Tracking Dashboard. There is also a search for CFA Number, Applicant, and Project Name. For a full description of all the fields, see data dictionary below.

Each tab also has a "Status Guide" (simple description of each status) as well as a back arrow to refresh/clear any filters or selections that have been made (see more info on section below).

Dashboards 101 – How to Use Dashboard

The best way to get a feel for the dashboards is to login and start using them. We've highlighted some of the more helpful functions:
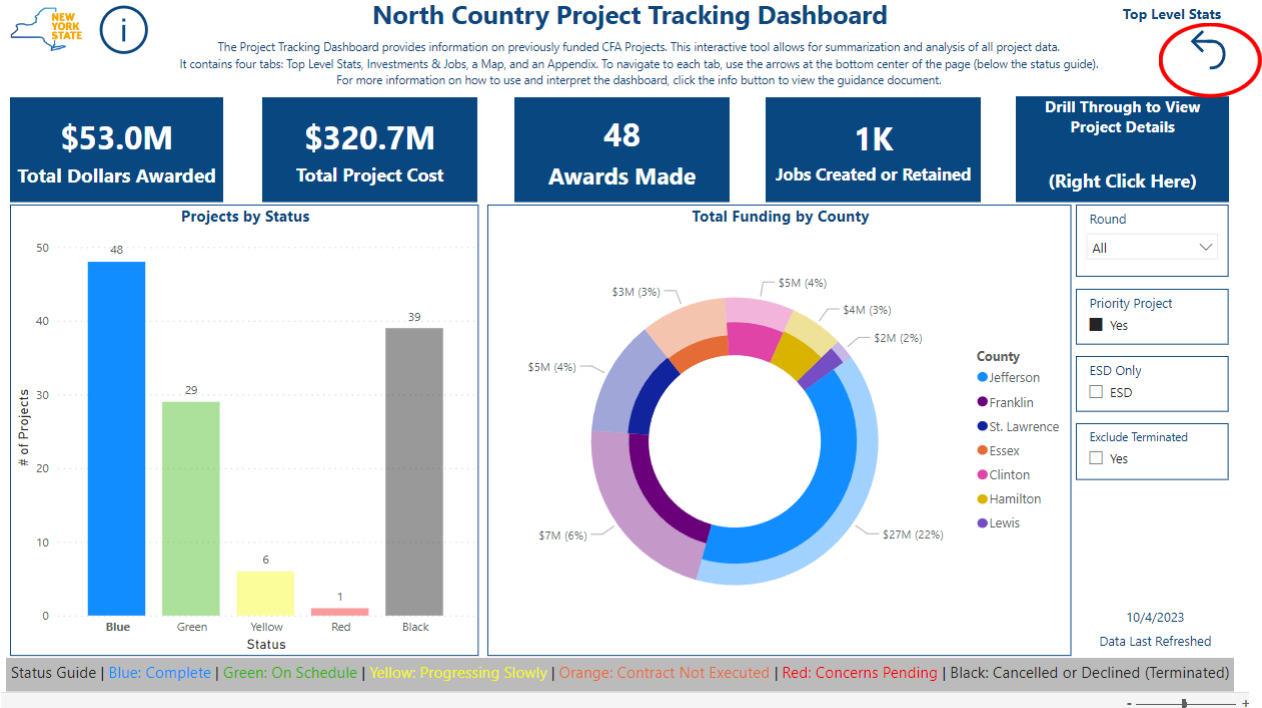
1. Page Navigation: To navigate from one page (tab) to another, use the arrows at the bottom center of the page (below the status guide – circled in screenshot below).
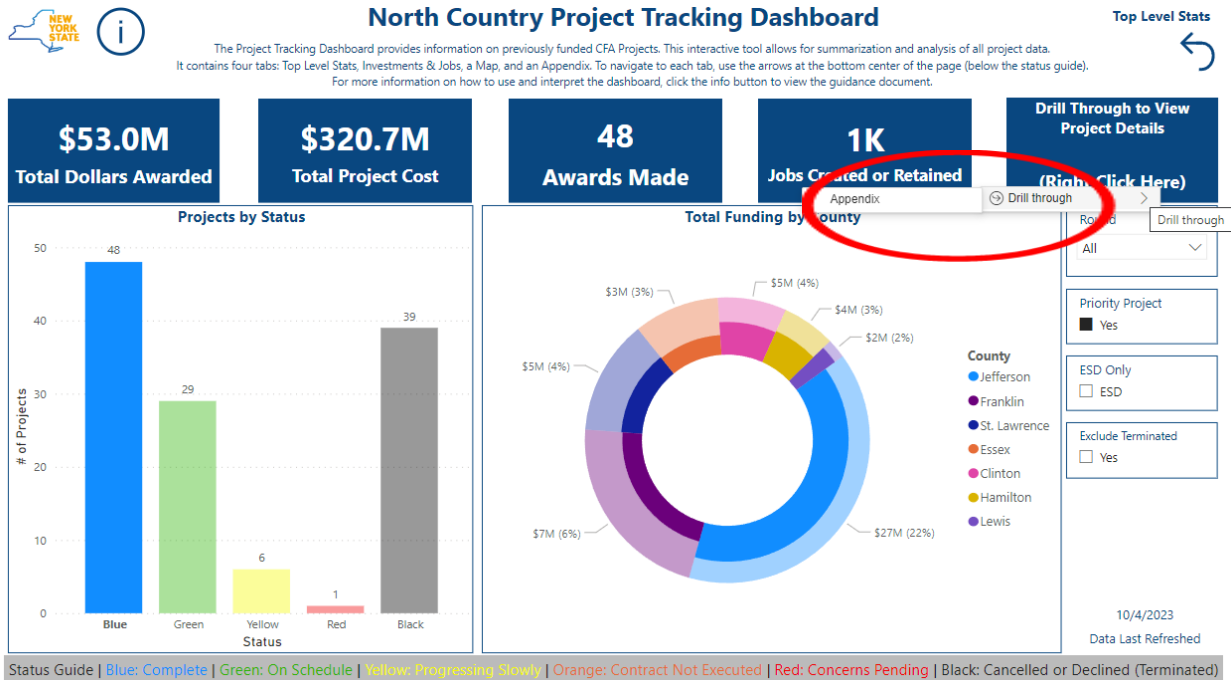
2. Filtering
    A. Standard "check box" filters such as region, round, priority, or agency.
    B. Graphics/charts filters: many of the graphics/charts act as filters themselves.
        b. For example, the below screenshot is currently filtered for all projects with Status = Blue and Priority Project = Yes. Multiple selections can be applied to a filter by holding down ctrl and clicking multiple data points.

To clear this filter, you can re-click on the visualizations themselves or click the back arrow button (circled red in above screenshot).

3. Drill-through: If you want to see project level details of the data, most visualizations can "right click and drill through". Using the above example, right clicking on the drill through button and selecting "Appendix" will take you to the appendix page filtered for projects with Status = Blue and Priority Project = Yes (see screenshot below).

Dashboards 101 – Data Dictionary

Field Name	Data Description
CFA #	The CFA application number provided at time of application.
Round	The CFA Round number associated with the project.
Region	The ESD region associated with the project.
Applicant	The name of the applicant receiving the award.
Project Name	The name of the project receiving the award.
Agency	The name of the awarding agency.
Program	The program name for the award.
Award Amount	The award amount for the project.
Total Project Cost	The current total project cost for the project. This includes the awarded amount as well as any additional state, local, federal, other public, and private investments.
Total Disbursed	The current total dollars disbursed for the award.
Status	The CFA project status (Blue, Green, Yellow, Orange, Red, or Black).
Priority	Whether the award is identified as being a priority project.