**Looking After Dashboard - Power BI Project**

**Purpose**

The Looking After Dashboard provides a unified view of critical property management metrics, enabling efficient tracking of conservation, building surveys, curatorial efforts, and climate environment audits. This project empowers stakeholders to monitor performance, identify gaps, and prioritize actions across various portfolios and regions. The dashboard simplifies complex data into actionable insights, driving informed decision-making.

**Data Used**

1. **Building Survey Data**:
   * Frequency of conservation meetings.
   * Portfolios with 10-Year Plans (10YP) for buildings.
   * Attendance and participation in conservation meetings.
2. **Conservation Data**:
   * Conservation Condition Reports (CCR) and Conservation Management Plans (CMP).
   * Property compliance with ACRs (Annual Collection Reviews).
   * Status of key conservation projects across regions.
3. **Curatorial Data**:
   * Progress on Purpose and Proposition (PAP), Statement of Significance (SoS), and Statement of Purpose (SoP).
   * Responses by regions and properties.
4. **Climate Environment Audit Data**:
   * Climate Impact Assessment (CIA) progress and status.
   * Portfolio-level breakdown of planned, completed, and in-progress CIAs.

**Key Features**

**Page 1: Building Surveyors**

1. **Meeting Attendance**:
   * Tracks portfolios attending conservation meetings and the frequency of meetings.
2. **10-Year Plan Progress**:
   * Highlights the number of properties with updated 10YPs.
3. **Portfolio Insights**:
   * Identifies portfolios regularly engaged in building management.

**Page 2: Conservation**

1. **Conservation Project Status**:
   * CCR and CMP statuses categorized as Planned, Completed, or Not Started.
2. **ACR Compliance**:
   * Tracks properties lacking ACRs and conservation plans.
3. **Portfolio Overview**:
   * Displays regional and property-level progress on key conservation metrics.

**Page 3: Curators**

1. **PAP, SoP, and SoS Metrics**:
   * Visualizes planned, in-progress, and completed statuses for each curatorial process.
2. **Property Non-Compliance**:
   * Lists properties where critical curatorial steps are pending.
3. **Regional Breakdown**:
   * Tracks curatorial response by clusters and individual properties.

**Page 4: Climate Environment Audits**

1. **CIA Progress**:
   * Displays the number of planned, completed, and in-progress CIAs by region and portfolio.
2. **Timeline Insights**:
   * Highlights upcoming and overdue CIAs to prioritize actions.
3. **Portfolio Status**:
   * Visualizes the readiness of portfolios for climate-related audits.

**Insights**

1. **Enhanced Portfolio Management**:
   * Tracks the frequency of key meetings and engagement levels to improve collaboration.
2. **Proactive Conservation**:
   * Identifies gaps in conservation efforts, ensuring properties meet compliance standards.
3. **Curatorial Alignment**:
   * Highlights properties lagging in curatorial processes, enabling targeted intervention.
4. **Climate Resilience**:
   * Monitors the status of CIAs, ensuring timely actions to address climate impacts.

**Technical Details**

* **Tool Used**: Power BI
* **Visualizations**: Pie charts, bar charts, line graphs, and tables with interactive filters.
* **Filters**:
  + Cluster-level: Lakes, North East, North West, Yorkshire.
  + Year-based filters for timelines (2023–2027).
  + Status-based: Planned, Completed, In Progress, Not Started.

**How to Use**

1. **Filter by Region or Cluster**:
   * Customize insights by selecting specific portfolios or clusters.
2. **Drill Down by Property**:
   * Access detailed data for individual properties to track progress.
3. **Analyze Trends**:
   * Use year and status filters to identify patterns and prioritize tasks.

**Why This Project Stands Out**

The Looking After Dashboard is a testament to my ability to integrate diverse data streams into a cohesive reporting solution. By aligning metrics from conservation, curatorial, and climate audits, this project showcases advanced Power BI capabilities and a strategic approach to problem-solving. It provides actionable insights, making it an invaluable tool for effective property and portfolio management.