Dashboard Definition Document-Independent Expenditures

Document Authorization

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1. Introduction

The purpose of this document is to provide detailed information about the Worksheets(s), dashboard(s) and Story(s) created using Tableau software on the 'Independent Expenditure' Database.

There are situations where a user is viewing a dashboard and doesn't know what the charts and metrics on the dashboard represent. This really slows down the user, who is trying to interact with the dashboard and interpret the data. In order to provide some context and guidance to the viewers of my dashboard, this document is created surrounding my dashboard.

2. Scope

The scope of the document is described below.

- **Determining the audience:** Who will use the dashboard?

- **Determining the objective:** Which is the decision-making goal of this dashboard?

- **Determining the metrics and the content:** Which type of content will appear in the dashboard?

- **Determine the levels of data:** Which data aggregation level will be required by the audience?

3. Determining the audience

'Independent Expenditures' is a term used in the United States political process to describe political campaign contributions made by an individual or organization, "is not coordinated" candidate. The contribution is made towards either the election of a candidate, or the defeat of an opponent.

Primary audience – Political Parties :

I have determined that **Political parties** are the primary audience of the dashboard(s). Political parties usually need information on independent expenditure in order to adapt their political strategies during the whole process of election.

4. Determining the objective

As my primary audiences are Political parties, their goals are aligned not only at party candidate level but

also a very high level. The goals are described below.

Goals:

The primary goal of Political parties is to leverage from the entities that are more active when it comes to 'Independent expenditure' for various elections in USA. Rather targeting the low-contributing entities, if they target the **high-contributing entities**, it will be a quick win for them. In order to capture the *low hanging fruits,* they can look at the dashboard(s) that describe below things on a very high level.

Based on Contributor Type:

➢ Political parties would like to know the **expenditure behaviours of various contributing entities**. Various contributing entities are Organizations, Individuals, Committees, Candidate committee, Candidate, PAC – Political action committee and Party organizations. Once they have an idea about the entity who contributed the most, they would also like to know **who within that entity contributed the most**. Let's for e.g. Organizations contributed the most during election, we can find out top 5 organizations that contributed the most. Using this data, political parties can target such organizations during their election campaign and keep a good relationship with them.

Based on Geography:

➢ Political parties would like to know the **expenditure behaviours of various contributing entities from various part of USA**. We can find out the **top 5 states** which are very active when it comes to 'Independent expenditure'. From the top 5 states, we can also find out **top 5 cities** that contributed the most. Based on this result Political parties can align our campaign location to such areas to keep winning people's confidence.

Based on time:

➢ Political parties would like to know the **expenditure behaviours of various contributing entities during different time of the year**. We can find out in which months contributions made were maximum. So, we can put more effort in our election campaign during those months.
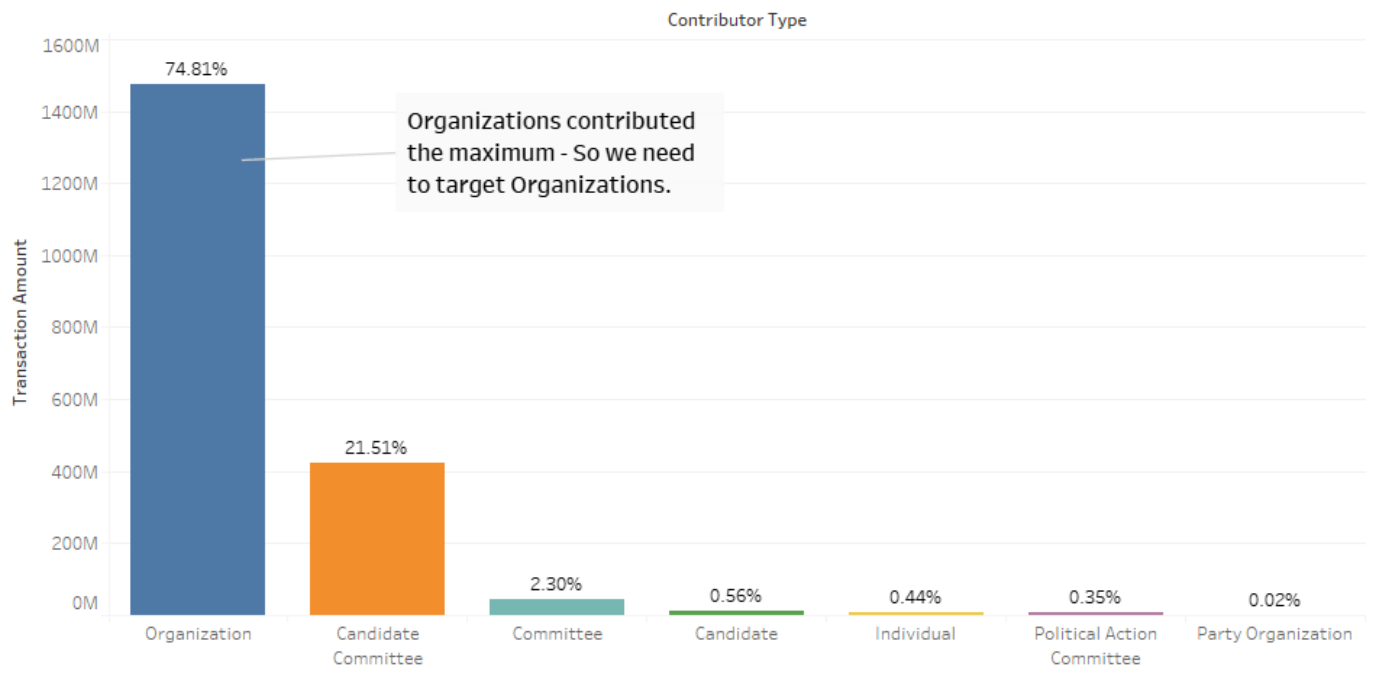
Based on type of contribution:

➢ Political parties would like to **validate whether 'Independent expenditure' really makes an impact in electing a candidate**. For this, they need to know which all candidates received the most contribution (Advocating amount vs Opposing amount). Based on this result, they can align their party goal.

5. Determining the metrics and the content

5.1 Worksheet – ContributorType:

Contribution made by different types of Entities

Contributor Type

Organizations contributed the maximum - So we need to target Organizations.

74.81%

21.51%

2.30%   0.56%   0.44%   0.35%   0.02%

Organization | Candidate Committee | Committee | Candidate | Individual | Political Action Committee | Party Organization

Transaction Amount — 1600M, 1400M, 1200M, 1000M, 800M, 600M, 400M, 200M, 0M

Description:

This chart shows the statistics of contribution made by different contributing entities.

Plot row (X-axis):

1. Sum of Transaction Amount
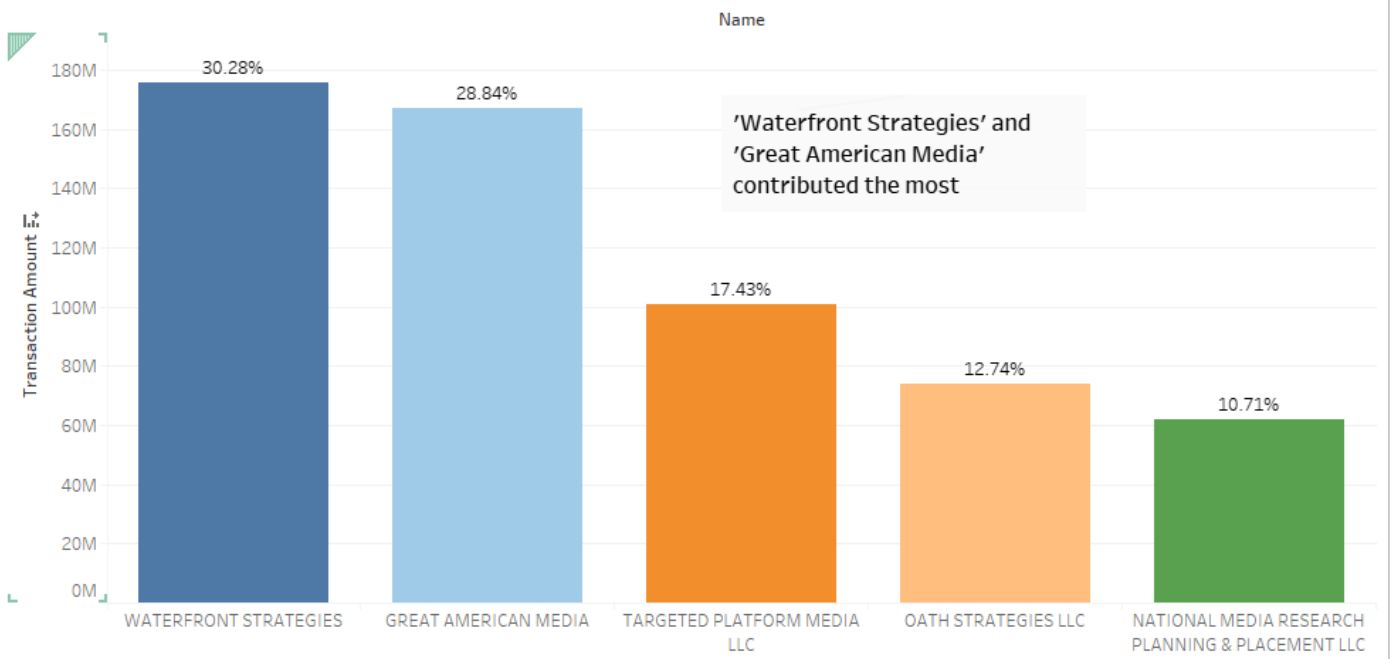
Plot column (Y-axis):

1. Contributor Type

Filters:

1. Contributor Type (UNKNOWN Contributor type removed)

Marks:

1. Color- Contributor Type
2. Label – Sum of Transaction Amount (Percentage of total)

5.2 Worksheet – Top 5 Organizations:

Top 5 Contributing Organizations

'Waterfront Strategies' and 'Great American Media' contributed the most

Description:

This chart shows the 5 most contributing Organizations.

Plot row (X-axis):

1. Sum of Transaction Amount

Plot column (Y-axis):

1. Name of the Contributor

Filters:

1. Name of the Contributor (Top 5 based on total contribution amount)

Marks:

2. Color – Name of the Contributor
3. Label – Sum of Transaction Amount (Percentage of total)

5.3 Worksheet – States:

Description:

This chart shows relative contributions made from different states. States are grouped based on different ranges of contribution. The ranges and respective colors are shown on the right side of the above image. User has the option to vary the filter created on the Sum (Amount) to know relative importance of various states.

Plot row (X-axis):
1. Latitude (Generated from State and Country)

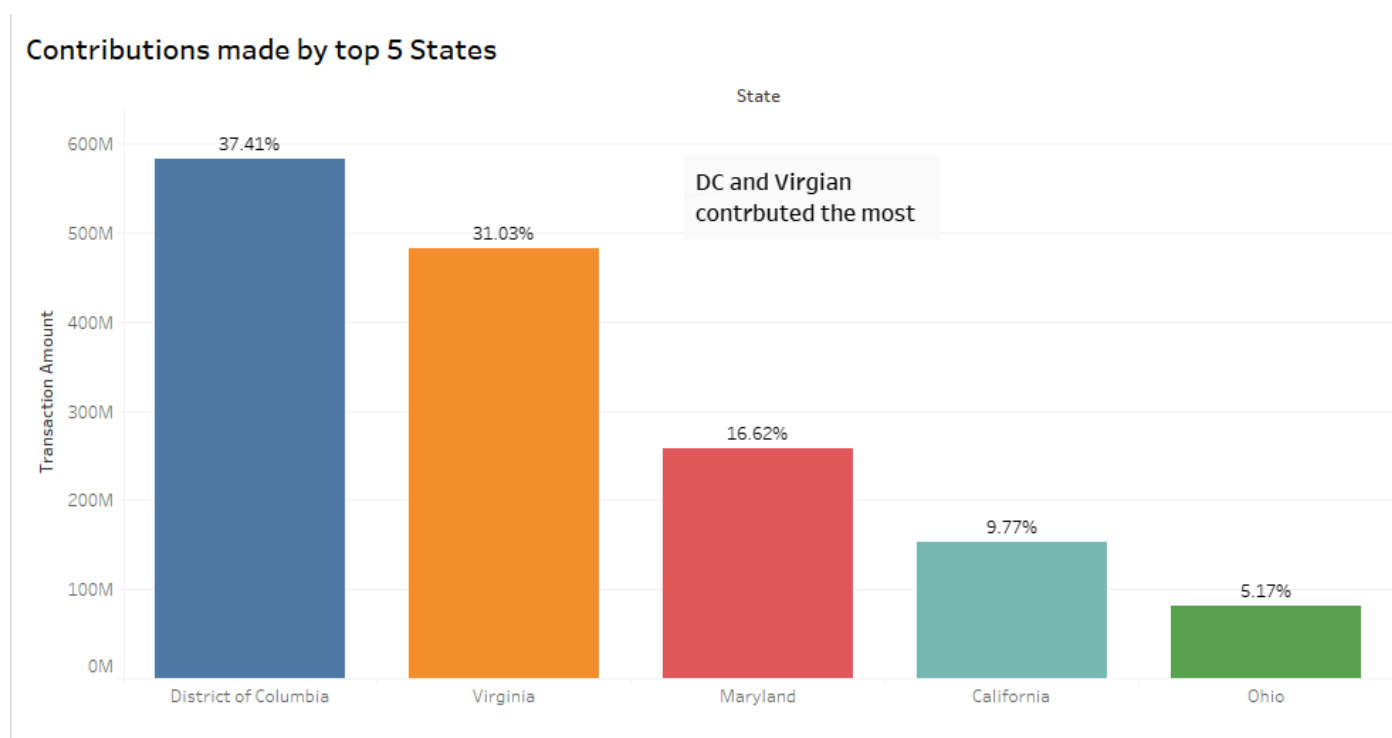Plot column (Y-axis):
1. Longitude (Generated from State and Country)

Filters:
1. Sum of Transaction amount – Range of values
2. Transaction date – Range of values

Marks:
1. Color – Amount range color (calculated field)
2. Label – State and Sum of Transaction amount
3. Detail – Country

5.4 Worksheet – Top 5 States:

Contributions made by top 5 States

State

DC and Virgian
contrbuted the most

Description:

This chart shows the 5 most contributing states in USA.

Plot row (X-axis):

1. Sum of Transaction amount
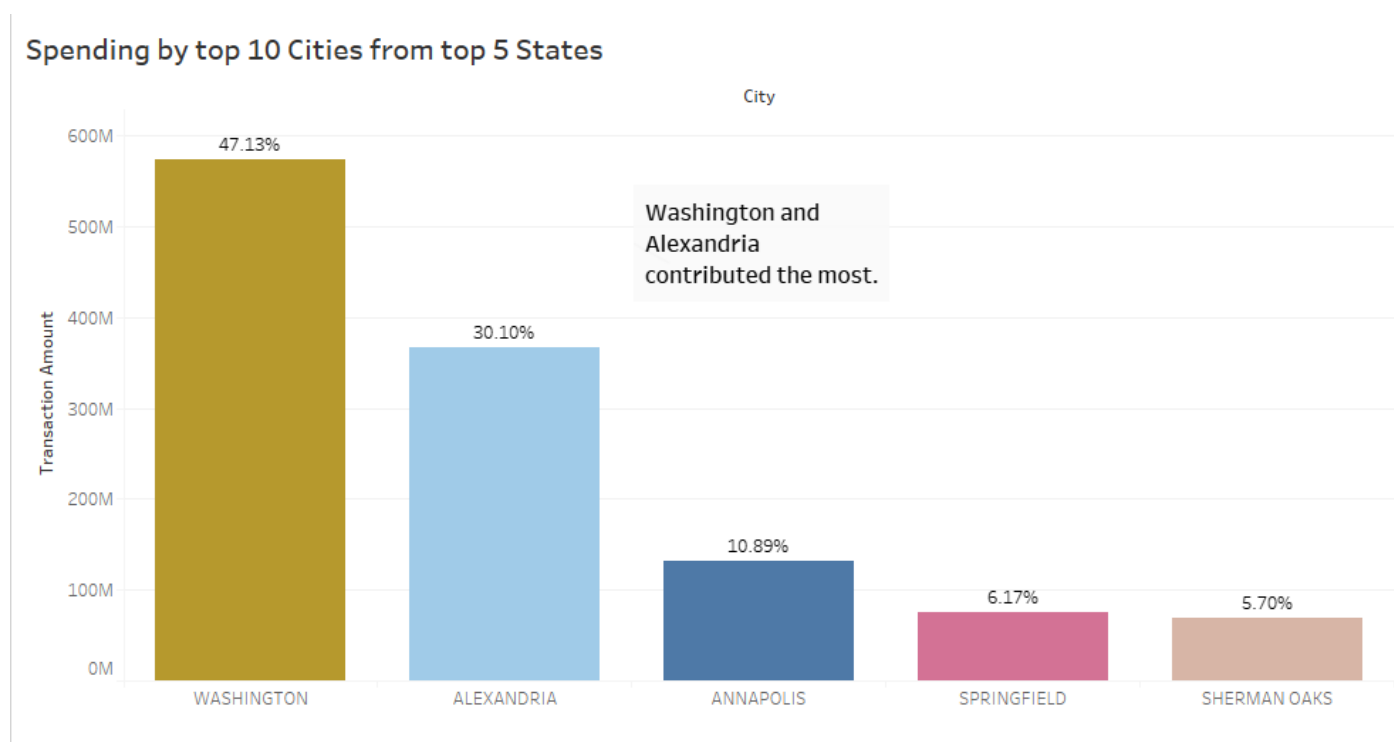
Plot column (Y-axis):

1. State

Filters:

1. State – Top 5 contributing States

Marks:

1. Color – State
2. Label – Sum of Transaction amount

5.5 Worksheet – Top 5 Cities of Top 5 States:

Spending by top 10 Cities from top 5 States

Description:

This chart shows the 5 most contributing cities from the 5 most contributing states of USA.

Plot row (X-axis):

  2. Sum of Transaction amount
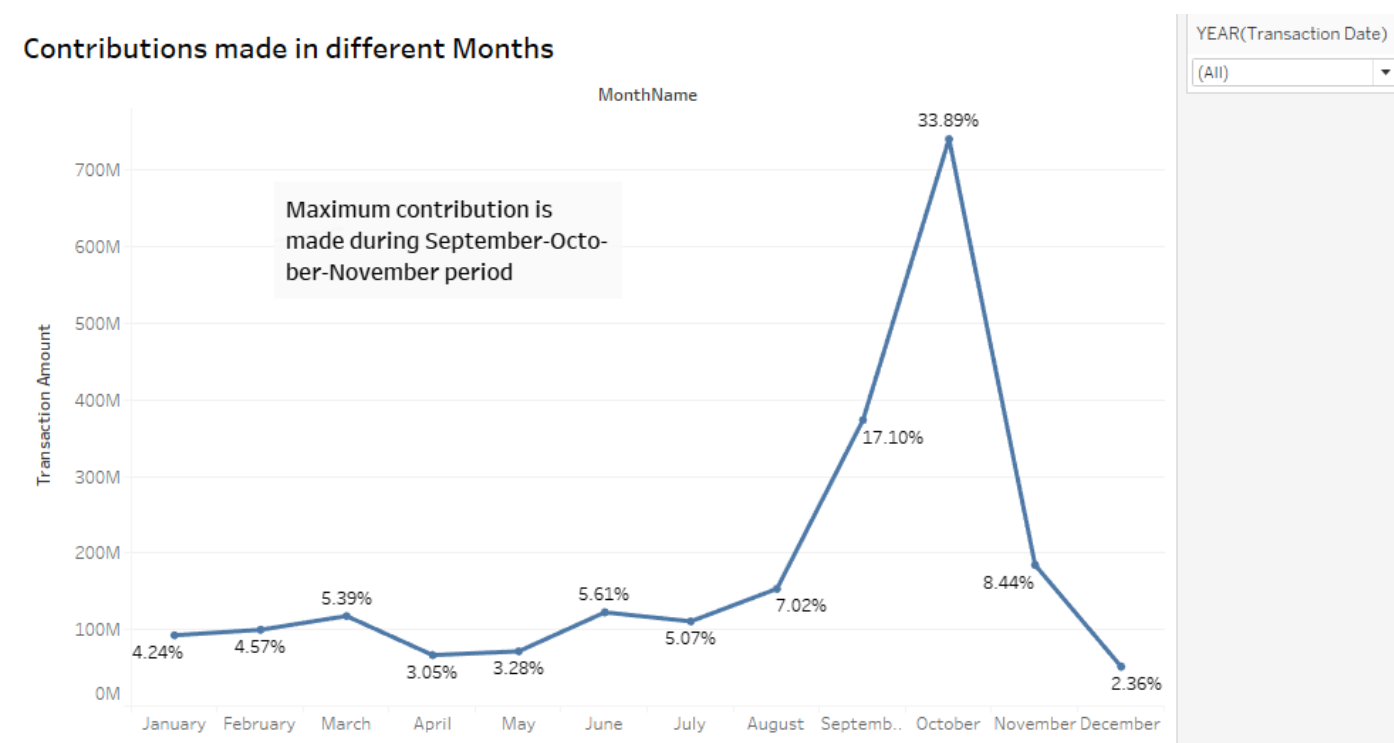
Plot column (Y-axis):

  2. City

Filters:

  2. City – Top 5 contributing cities
  3. State – Top 5 contributing states

Marks:

  3. Color – City
  4. Label – Sum of Transaction amount

5.6 Worksheet – Months:

Contributions made in different Months

MonthName

33.89%

17.10%

5.39%

5.61%

7.02%

8.44%

4.24%

4.57%

5.07%

3.05%

3.28%

2.36%

Maximum contribution is
made during September-Octo-
ber-November period

January February March April May June July August Septemb.. October November December

Transaction Amount

Description:

This chart shows how the contribution varies in different months of the year.

Plot row (X-axis):

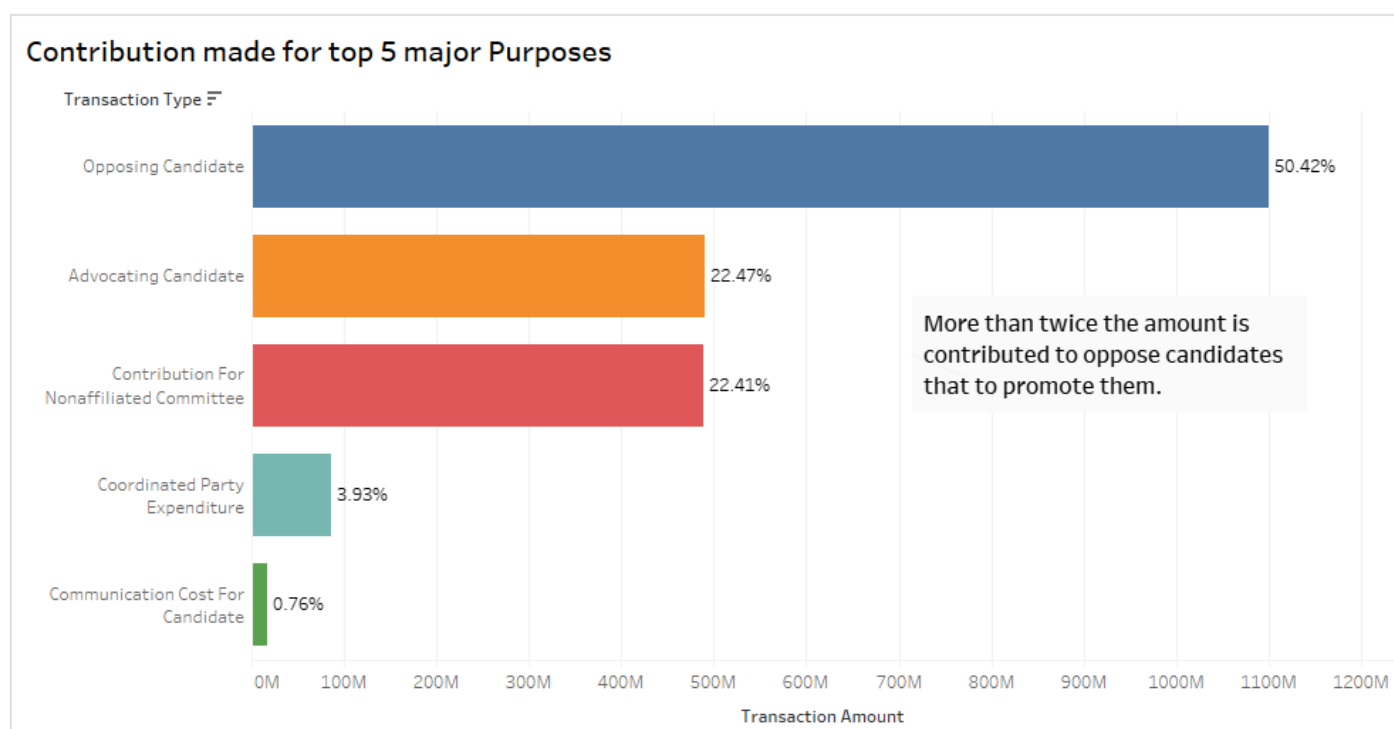1. Sum of Transaction amount

Plot column (Y-axis):

1. MonthName

Filters:

1. Year – Single value drop down

Marks:

1. Label – Sum of Transaction amount

5.7 Worksheet – ContributionType:

Contribution made for top 5 major Purposes

Transaction Type ⹀

Opposing Candidate	50.42%
Advocating Candidate	22.47%
Contribution For Nonaffiliated Committee	22.41%
Coordinated Party Expenditure	3.93%
Communication Cost For Candidate	0.76%

More than twice the amount is contributed to oppose candidates that to promote them.

0M   100M   200M   300M   400M   500M   600M   700M   800M   900M   1000M   1100M   1200M

Transaction Amount

Description:

This chart shows the leading purposes of the contribution.

Plot row (X-axis):

1. Transaction type

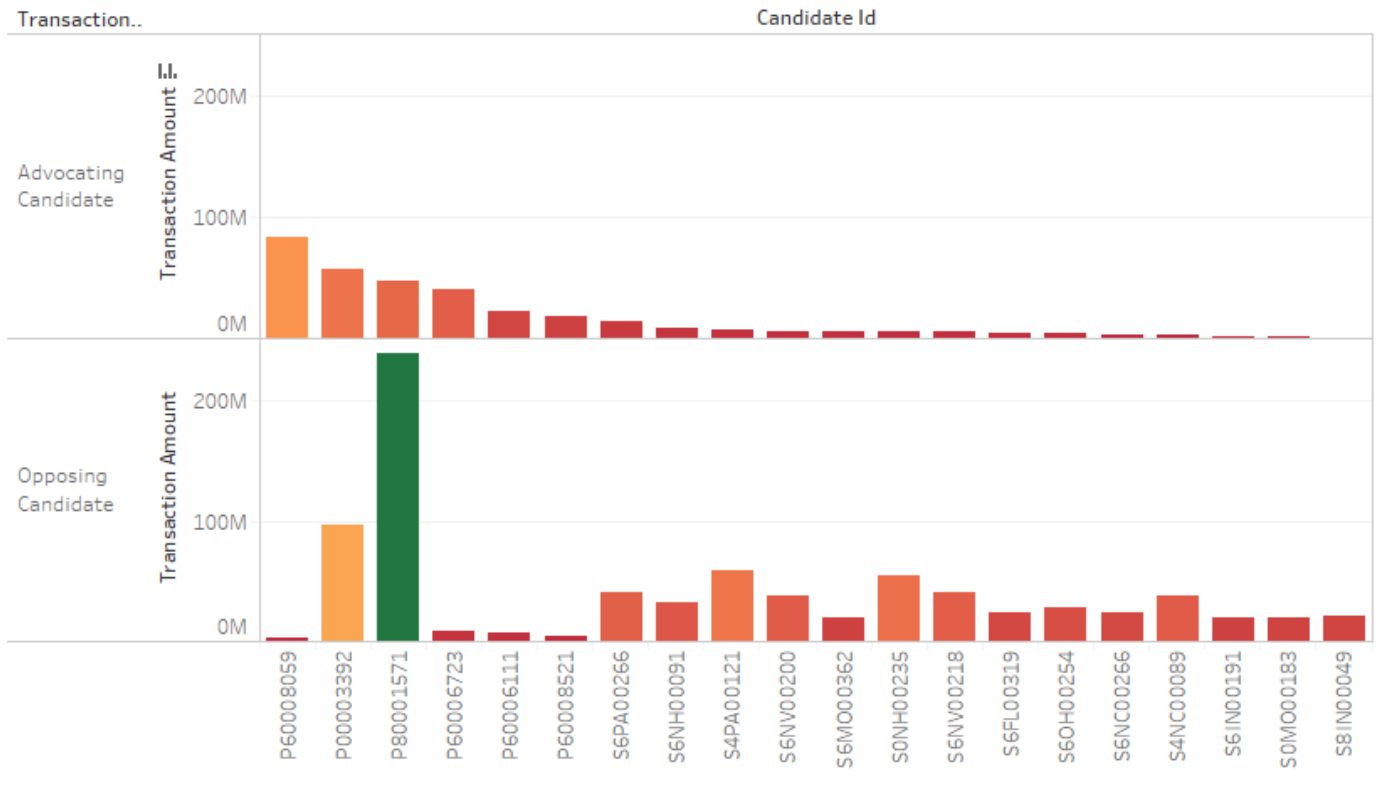Plot column (Y-axis):

1. Sum of Transaction amount

Filters:

1. Transaction type – Top 5 based on total contribution made

Marks:

5. Color – Transaction type
6. Label – Sum of Transaction amount

5.8 Worksheet – Recipients:

Top20 Recipients Vs Amount to Advocate Vs Amount to Oppose

Description:

This chart shows the top 20 candidates based on the contribution received.

Plot row (X-axis):

1. Transaction type
2. Sum of Transaction amount

Plot column (Y-axis):

1. Candidate Id

Filters:

1. Transaction type – Advocating candidate and Opposing candidate
2. Candidate Id – Top 20 candidates based on total contribution received.

Marks:

1. Color – Sum of Transaction amount

6. Determining the levels of data

Below data aggregation level are required by the audience.

1. The audience i.e. the Political parties wants to know about the 'Independent expenditure' corresponding to last year's election i.e. 2015-2016. Hence need to aggregate data based on the transaction date i.e. all the expenditure made between 01-Jan-2015 to 31-Dec-2016. Here is data is aggregated based on a single election.

2. Some unnecessary attributes are removed from the aggregated data level to avoid the overload on the reports. Unnecessary attributes are specific to below database dimensions.

   a. D_PROFESSION → Contains information related to contributor's profession
   b. D_REPORT → Contains information related to the independent expenditure reports
   c. D_ELECTION → Contains information related to election.