

NDIS Operational & Financial Insights Dashboard

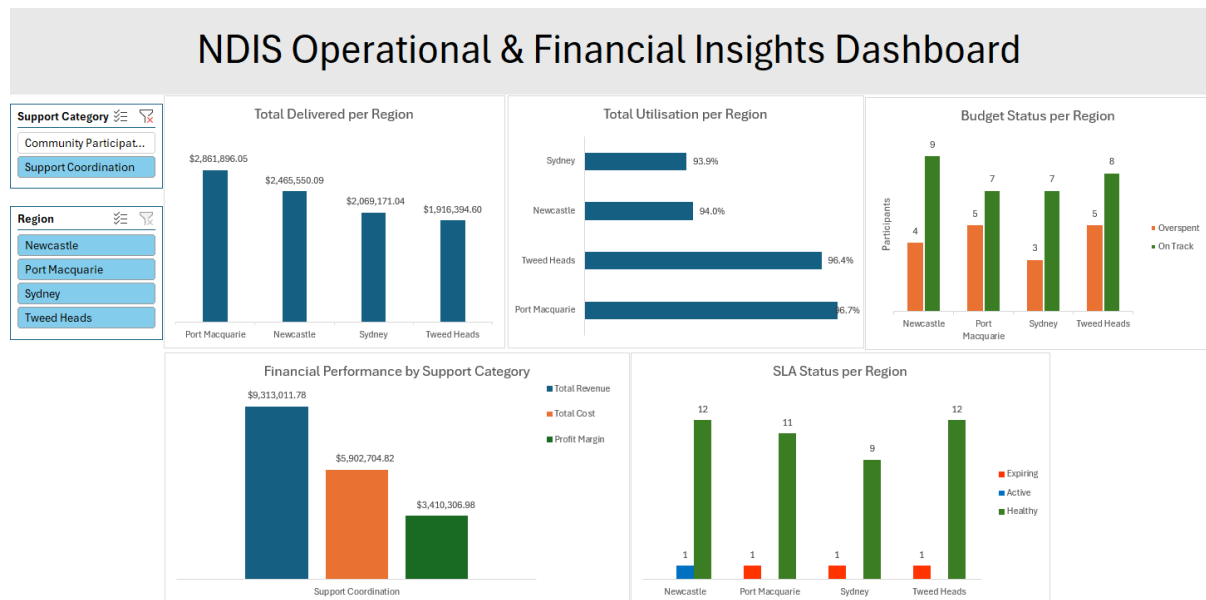
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Project Overview

This project simulates a real-world NDIS operational and financial reporting scenario. The objective was to transform participant-level data into clear, actionable insights to support operational teams and leadership in decision-making.

The dashboard was built in Microsoft Excel using Pivot Tables, Pivot Charts and Slicers, with a focus on clarity, usability and stakeholder-friendly storytelling.

Figure 1: NDIS Operational & Financial Insights Dashboard



Key Questions Addressed

- How much funding is being delivered across regions?
- How effectively is allocated funding being utilised?
- Which support categories are most financially sustainable?
- Where are budget and SLA risks emerging?

Skills Demonstrated

- Advanced Excel (Pivot Tables, Pivot Charts, Slicers)
- Data cleaning and formatting
- Financial and operational KPI design
- Dashboard layout and visual hierarchy
- FILTER, XLOOKUP and IF logic
- Stakeholder-focused reporting

Core Metrics & Analysis

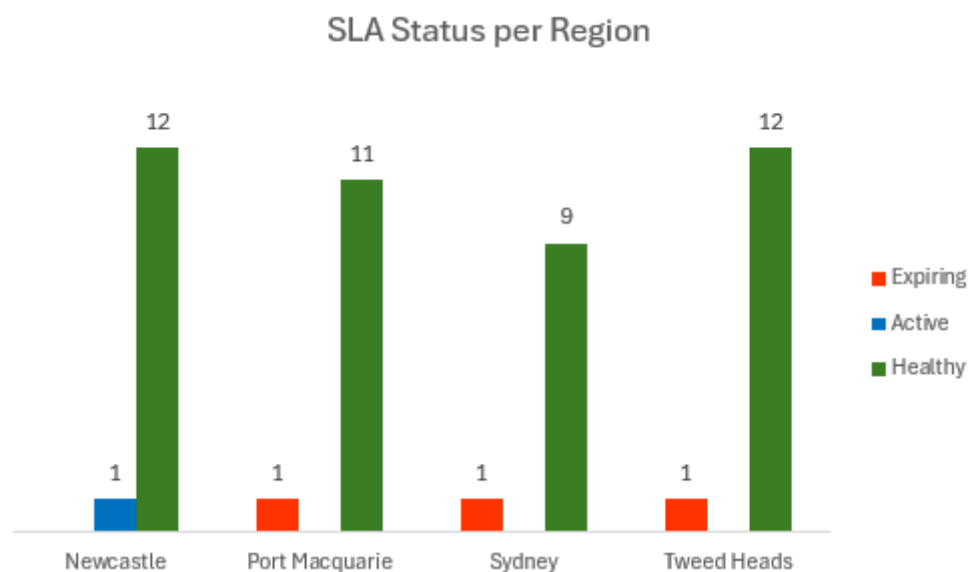
Delivery & Utilisation: Analysed delivered funding and utilisation percentage by region to assess operational scale and efficiency.

Financial Performance: Compared revenue, cost and profit margin by support category to evaluate service sustainability.

Budget Risk: Identified participants who are overspent versus on track to support proactive intervention.

SLA Monitoring: Highlighted expiring service agreements by region to reduce operational risk and service gaps.

Figure 2: SLA Status per Region



Key Insights

- Funding utilisation is consistently high across regions, with minimal variance in delivered value.
- Financial performance varies by support category due to differences in cost structure, not just revenue volume.
- SLA and budget risks are distributed across regions, reinforcing the need for consistent monitoring.

Next Steps

Potential enhancements include adding a time dimension for trend analysis, automating data refresh, and migrating the model to Power BI for enterprise-scale reporting and wider stakeholder access.

Note: All data used in this project is fictitious and intended solely for demonstration purposes.