SEPTEMBER 2025

TECH FORWARD

Information Without Frustration

BUILDING DASHBOARDS THAT
MAKE WORK EASIER FOR EVERYONE

SAMANTHA LEVINSON
THE BAIL PROJECT

What are some best practices for dashboard design?

Who identified these best practices?

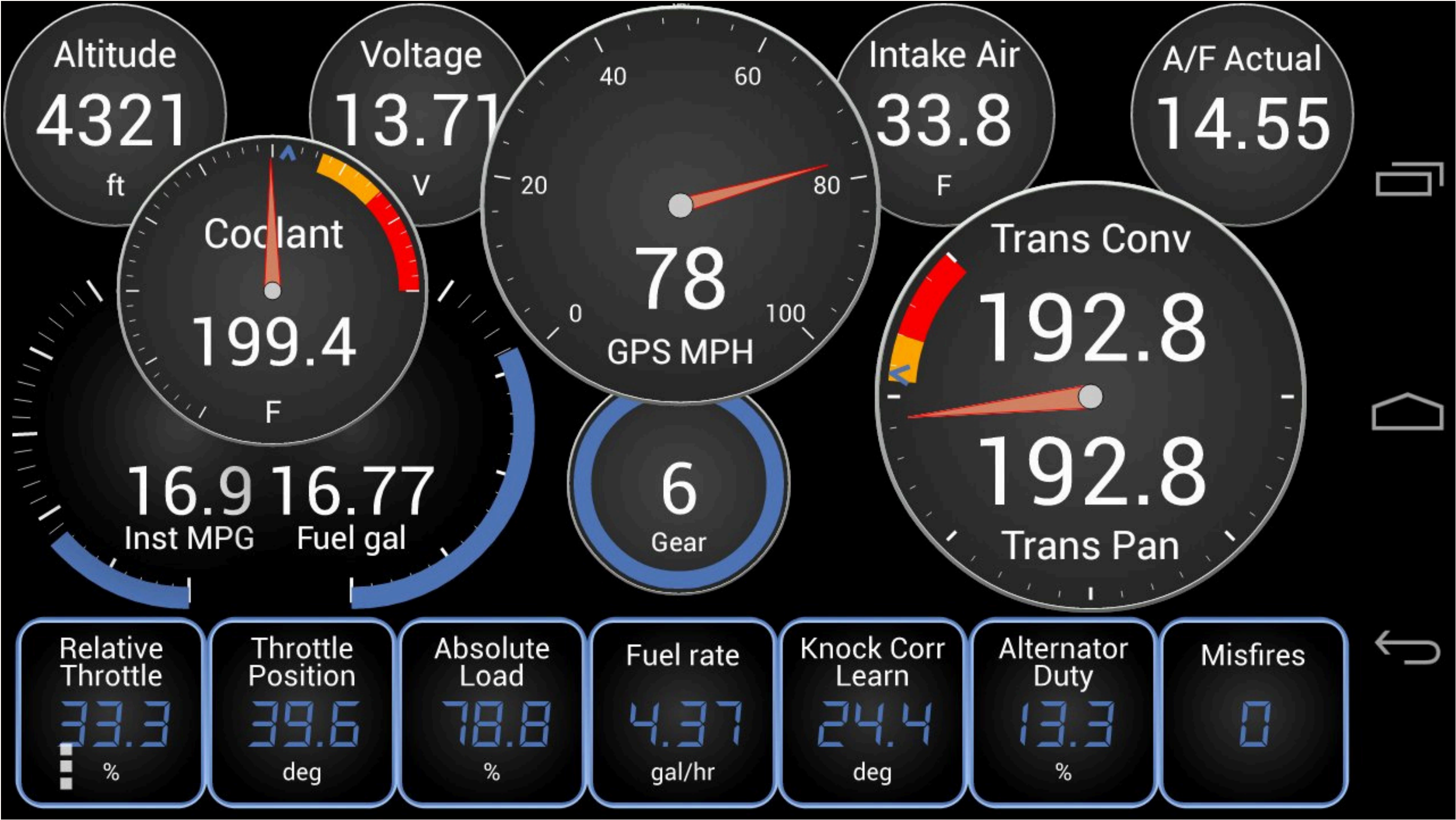# Who is the primary audience for these dashboards?

INTRODUCTION

Altitude
4321
ft

Voltage
13.71
V

MPH
40   60
20   80
78
0   100
GPS MPH

Intake Air
33.8
F

A/F Actual
14.55

Coolant
199.4
F

16.9 16.77
Inst MPG   Fuel gal

6
Gear

Trans Conv
192.8
192.8
Trans Pan

Relative Throttle	Throttle Position	Absolute Load	Fuel rate	Knock Corr Learn	Alternator Duty	Misfires
73.3 %	39.6 deg	78.8 %	4.37 gal/hr	24.4 deg	13.3 %	0

AGENDA

- PROFESSIONAL BACKGROUND
- ORGANIZATIONAL CONTEXT
- CASE STUDY FROM THE BAIL PROJECT
- CHECKLIST & APPLICABLE LEARNINGS
- QUESTIONS & DISCUSSION

INTRODUCTION

Hi! It's me.

Samantha Levinson is the Director of Program Innovation and Client Experience at The Bail Project, a national organization that pays bail for low-income individuals to prevent them from being held in jail before trial. She also previously served as Acting CEO of Allegheny HealthChoices, Inc., a Medicaid oversight organization in Pennsylvania. 🔗

In her role at The Bail Project, Levinson focuses on identifying and implementing best practices in program design and data management, as well as incorporating client feedback into program improvements. She has a strong background in using data to improve systems that impact vulnerable communities. 🔗

Before joining The Bail Project, Levinson worked at Allegheny HealthChoices, Inc., where she was responsible for strategic planning, risk mitigation, and developing operational processes. She also previously worked as a data analyst at Allegheny HealthChoices, supporting the organization's work with behavioral health providers and administrators. She holds a B.A. in French and a B.S. in Economics from the University of Pittsburgh, as well as an M.S. in Public Policy and Management from Carnegie Mellon University. 🔗

HTTPS://WWW.LINKEDIN.COM/IN/SAMANTHALEVINSON

Taking money out of justice

Cash bail is a system where a person's freedom before trial depends on how much money they have.

The system doesn't measure safety – it measures wealth.

Through our Community Release with Support model, The Bail Project demonstrates what a fairer pretrial justice system can look like, by providing free bail assistance and pretrial support to thousands of low-income people across the country each year.

OUR WORK

How do we support clients after their release from jail?

- Court notifications
- Transportation

How do we support our staff in managing their caseloads?

- Dashboards & reports
- Site-level KPIs

CASE STUDY CONTEXT

Original dashboard design

COURT NOTIFICATIONS

- J. CROCE ✅
- L. FRANKLE
- S. RANKLES
- J. OHNO
- L. JEFFRIES ✅
- J. POI

TRANSPORTATION ASSISTANCE

- J. CROCE
- L. JEFFRIES
- D. DULCE
- I. PEAK
- N. DEAN
- K. FRENKS

YOU OTHER GRAPH REQUESTS

- J. POI
- J. OHNO
- S. PARRY
- B. PEEDS
- J. PITTS
- D. REID

CASE STUDY CONTEXT

Original dashboard design

COURT NOTIFICATIONS

J. CROCE ✓

L. FRANKLE

S. RANKLES

J. OHNO

L. JEFFRIES ✓

J. POI

CLIENT CONFIRMATION QUESTIONNAIRE

IS THE CLIENT ABLE TO ATTEND COURT?

DOES THE CLIENT NEED HELP GETTING TO/FROM COURT?

DOES THE CLIENT HAVE ANY QUESTIONS?

MOCK DATA USED FOR ILLUSTRATION PURPOSES ONLY

CASE STUDY CONTEXT
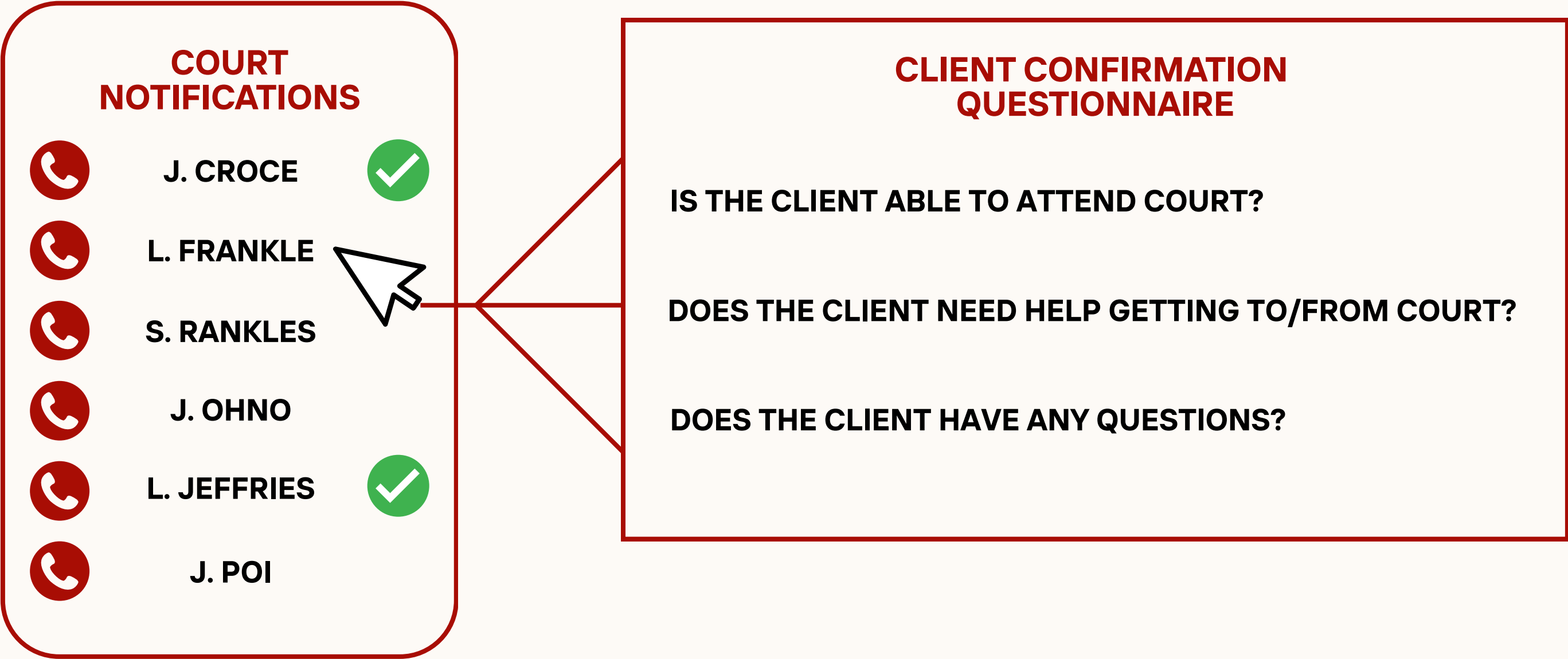
What prompted our dashboard redesign?

- Custom code made dashboard inflexible and fragile

- Increased downtime & risk due to aging infrastructure

- Dashboard provided little-to-no guidance re: prioritization, expectations

- Upcoming release of program standards required supportive tools

What barriers did our redesign face?

- The original solution:
  - minimized "clicks" needed to log task completion
  - gained popularity due to its longevity, ease of use
  - was flashy due to custom coded features

- The new solution:
  - would not be flashy and would require more "clicks"
  - was part of a broader standardization process

Updated Dashboard: Tables > Columns

UPCOMING COURT APPEARANCES

COURT DATE ↑	CLIENT NAME	COURT CASE IDS	NO. ATTEMPTS	CONFIRMATION STATUS	ACTION STEP
9/3/2025	J. CROCE	XXYZ867	5	EXPECTATIONS MET	NO ACTION NEEDED
9/3/2025	L. FRANKLE	XXZZ673	1	CONFIRMED	NO ACTION NEEDED
9/4/2025	S. RANKLES	XXYZA42	1	FOLLOW-UP NEEDED	REACH OUT
9/4/2025	J. OHNO	XXY4569	0	NOT ATTEMPTED	WAIT - DON'T CALL YET
9/6/2025	L. JEFFRIES	XXYA193	3	EXPECTATIONS MET	NO ACTION NEEDED
9/8/2025	J. POI	XXY2873	0	CONFIRMED	NO ACTION NEEDED

CASE STUDY CONTEXT

Updated Dashboard Details

Prioritized data that would limit other "clicks" in staff processes- staff can copy and paste these IDs directly into the court docket

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CASE STUDY CONTEXT

Gave staff insight into their own efforts to understand how their work connected to site expectations they were being held to

Updated Dashboard Details

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CASE STUDY CONTEXT

Updated Dashboard Details

Provided clear priorities for how staff should spend their time, reducing the cognitive load from learning new expectations / processes
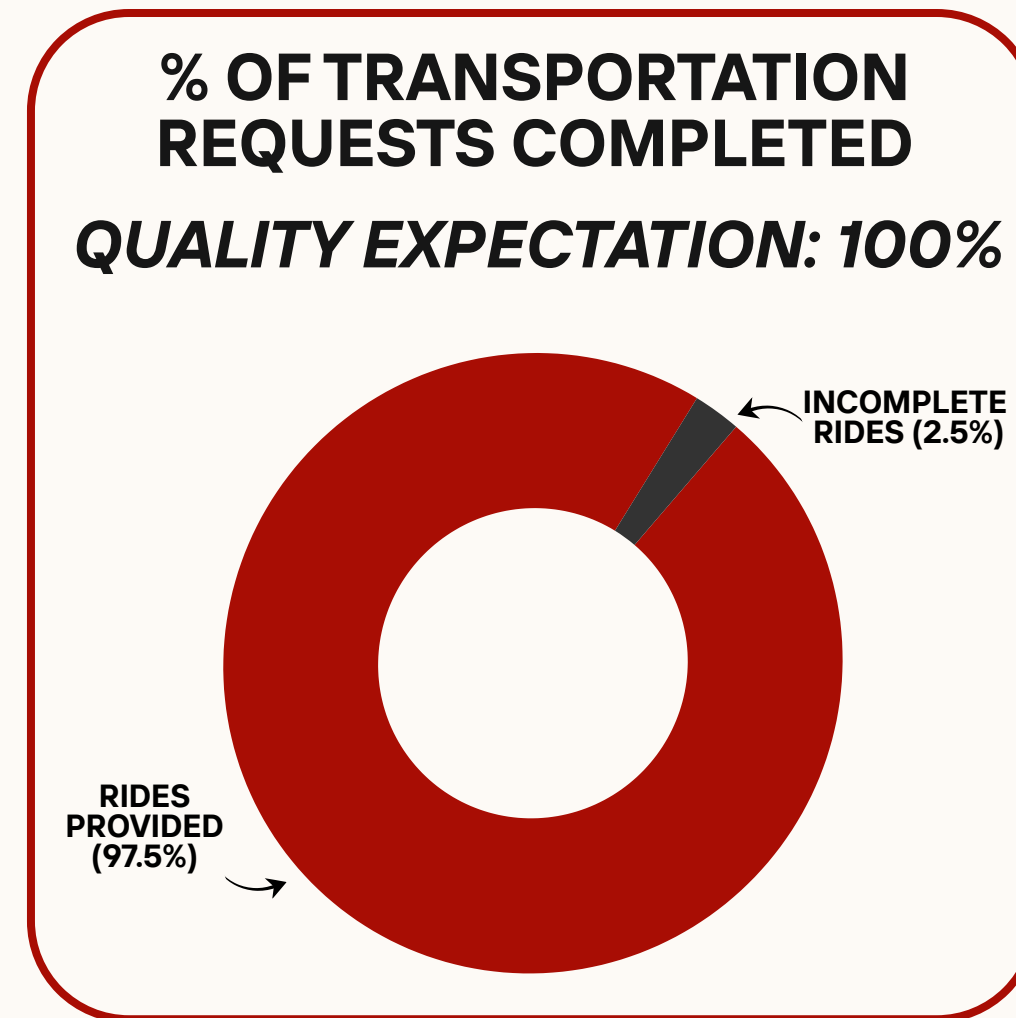
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CASE STUDY CONTEXT

Reimagining Dashboard Widgets

NO. OF COURT DATES REMAINING TO CONFIRM

18

Implemented color-coded widgets that showed staff progress towards their goals on their terms

% OF TRANSPORTATION REQUESTS COMPLETED
QUALITY EXPECTATION: 100%

INCOMPLETE RIDES (2.5%)

RIDES PROVIDED (97.5%)

Used subtitles to bring program expectations directly into the dashboard

CASE STUDY CONTEXT

1 Ensure organizational priorities are reflected in dashboards

The more you know about program expectations, the more opportunities you'll find to use dashboards effectively as a tool to support high quality service delivery

2 Prioritize customizing out-of-the-box tools, not building your own

Leveraging calculated columns, help text, sorting functions, and filters allows you to acheive a custom tool for staff while limiting technical risk and debt incurred by homegrown tools

3 Use tech to decrease decision-making fatigue and increase motivation

Stop thinking of dashboards as just data visualization; they are an extension of your program standards and your org culture. Automate where possible and make tools as motivational as you can

4 Centralize needed information to create a one-stop shop for staff

Staff's most valuable resource is their time – help them save as much as possible by ensuring they have the information they need to accomplish key tasks at their fingertips

CHECKLIST

ACTION

ASK QUESTIONS SUCH AS:

1 Assess your personal and organizational understanding of service delivery work flows

- What tasks are staff responsible for on a daily, weekly, monthly basis?
- What is the priority if staff run out of time?
- What information do they need to complete these tasks?
- How do they signal that these tasks have been completed?

2 Identify available out-of-the-box functionality you can use to create a custom UX for staff

- What would staff lose in terms of functionality or UI if we transitioned to a no-code dashboard? Is it worth the risk of an outage?
- What would my staff work on if they didn't have to maintain custom code?
- What tools are available to me within my platform (color-coding, complex filtering, pop-up/out windows for key tasks, etc)?

3 Brainstorm ways to support prioritization and efficiency using technology

- Are there any rule-based decisions staff make repeatedly? Are the data used for those decisions currently housed in the database?
- How can we organize the dashboard to enable staff to move faster through comparable tasks?
- How can we help staff see their impact and progress?

4 Develop a strategy to consolidate essential service data into a one-stop-shop dashboard

- What data do staff need easy access to for repetitive tasks?
- What (if any) changes to the data system would be needed to make this information more accessible on dashboards?
- How can we configure data in reporting to make it mirror staff existing workflows?

Thank you!
Any Questions?