

Reporting with Power BI

Our Journey to Streamlined and Enhanced Reporting

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Before Power BI

Duplicated Efforts

- Departments ran the same reports unknowingly
- Several versions of the same information displayed differently

Time-Intensive Reporting

- Manually pulling, compiling, and manipulating information to display key metrics

Reporting As Needed

- Consistent access to data did not exist
- Often reporting once a year, instead of having information to reference throughout the year

Siloed Information

- A million spreadsheets capturing information
- Information stored in different locations making access difficult

Report Process



Design Phase

- Met 1-on-1 with department leads
- Review current reports (or needs if no report exists) and any wants for a redesigned report
 - Typical questions:
 - How do you want to visualize the data?
 - Do you need to filter the data?
 - Is there any information you want to add to the report?
- Create drafts, meet and review until final product is ready to turn over to staff!



FILTERS

Date Range

7/1/2025

5/31/2026

Navigate To:

Distribution

Waste Report

Pounds Received

23,442,982

Prior Year **22,574,818** 4% ↑



8,507,958 **11,045,3...** **3,889,667**

Prior Year

8,406,095

1% ↑

Prior Year

10,059,005

10% ↑

Prior Year

4,109,718

-5% ↓

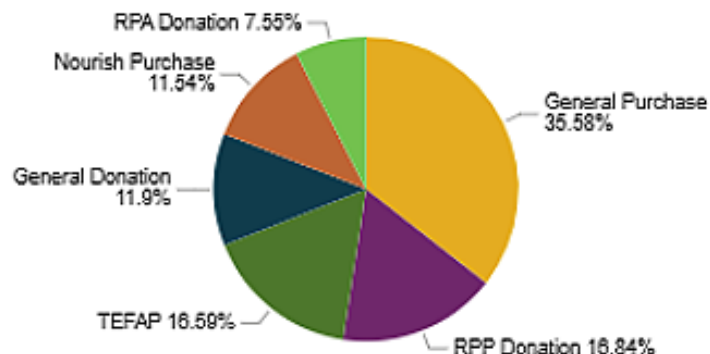
DONATED

PURCHASED

USDA

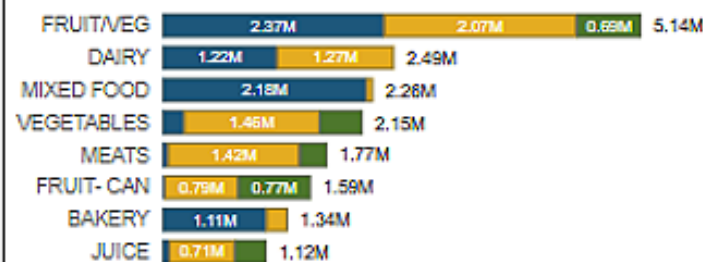
Filters

Pounds Received by Source



Pounds Received by Product Type

Inventory Posting ... ● DONATED ● PURCHASED ● USDA



Year	Source	2025 Pounds Received	Cost	Cost Per Pound	2026 Pounds Received	Cost
2025	TEFAP	2,728,498.00	\$0.00	\$0.00	1,161,169.00	\$0.00
2025	General Purchase	2,167,379.00	\$0.00	\$0.00	1,779,723.00	\$0.00
2025	General Donation	1,011,213.00	\$0.00	\$0.00	759,431.00	\$0.00
2025	Nourish Purchase	1,312,554.00	\$1,809,556.79	\$1.38	1,392,277.00	\$2,106,749.45
2025	RPP Donation	5,004,253.50	\$5,348,938.80	\$1.07	3,336,298.50	\$3,796,670.13
2025	RPA Donation	1,142,876.00	\$0.00	\$0.00	1,647,310.00	\$0.00
2025	Total	13,366,773.50	\$7,158,495.59	\$0.54	10,076,208.50	\$5,903,419.58



Live data

Show interactive Power BI data to people with existing access.



Snapshot

Show an image of Power BI data to people with existing access.



Public snapshot

Show an image of Power BI data to people with access to this deck.

Public snapshot

Data updated on 6/8/26, 5:11 AM



FILTERS

Date Range

7/1/2025

4/30/2026

Category

All

Navigate To:

Month View

Request Form

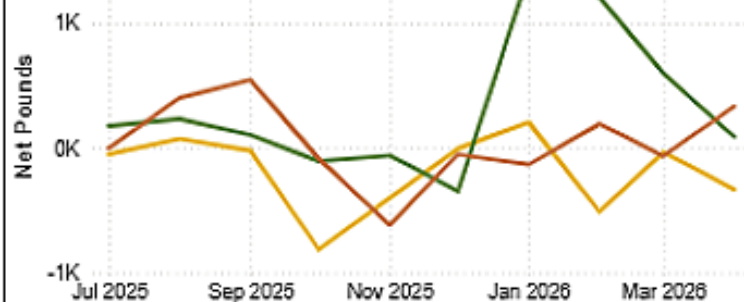
Last Refresh

5/1/2026 3:57:27 PM

Version 1.2.0

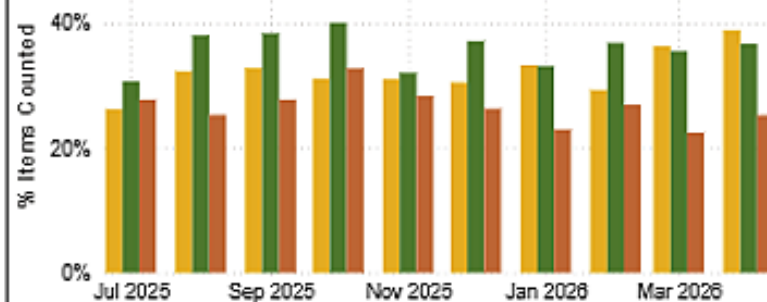
Net Pounds (Non USDA)

Category COOLER DRY FREEZER



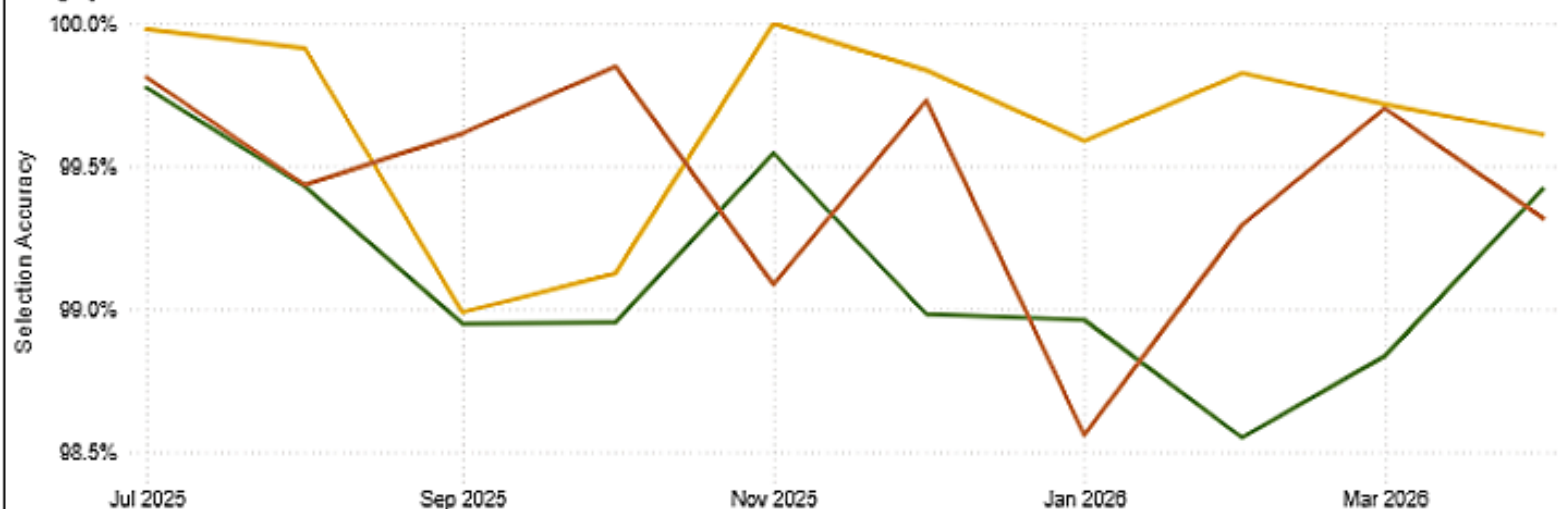
Item Counts (Non USDA)

Category COOLER DRY FREEZER



Warehouse Accuracy (Non USDA)

Category COOLER DRY FREEZER



Inventory Discrepancy Report, Trends

Public snapshot

Data updated on 5/1/26, 4:04 PM





FILTERS

Agency

All

Date

7/1/2025

5/31/2026

Navigate To:

Agency Profile

Agency Financials

Last Refresh

7/23/2026
6:15 AMVersion
2.1.1

Filters

123,069.00

Pounds Distributed

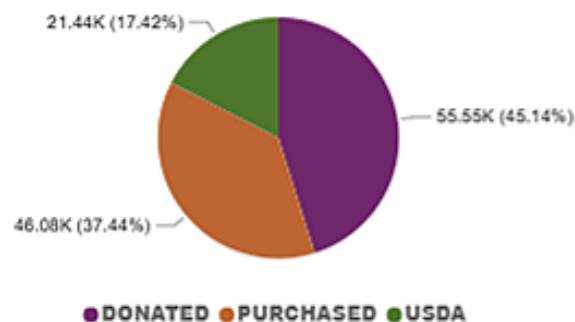
680

Average of Individuals

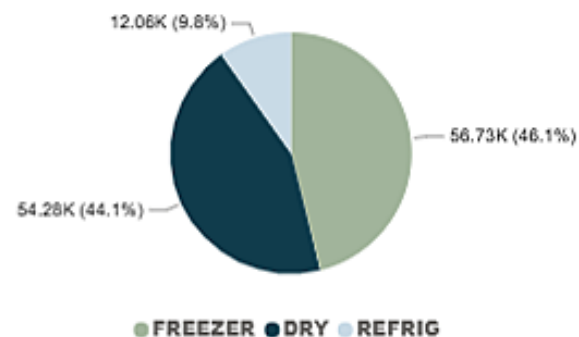
27

Orders Placed

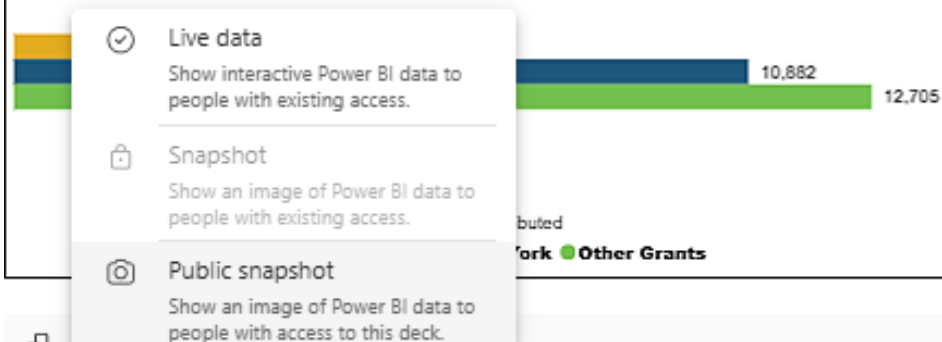
Poundage Categories



Poundage by Storage



Pounds Distributed by Grant Source



Individuals Reported Monthly



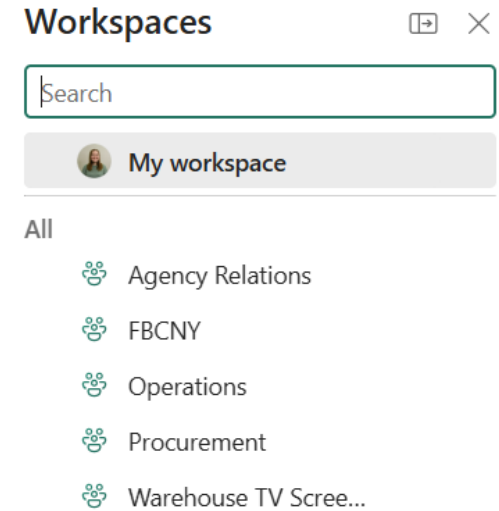
Public snapshot

Data updated on 7/23/26, 6:23 AM



Maintenance Phase

- Set up Workspace in Power BI Service for report access
 - Currently organized by department
- Establish 30-day and annual check in for reports
 - Ad-hoc issues that arise are communicated as well
- Monitor refresh for any errors
 - Can schedule automatic emails to alert any issues
- Enhance visuals as new features are released or reporting needs change



Tips, Tricks, and Benefits



Tips and Tricks for Power BI

- Stay up to date on visual enhancements and Power BI updates
 - Game changer in reporting capabilities
- Track report changes and release information

Online Resources for Power BI:

- [Pragmatic Works](#)
 - [Learn with the Nerds](#)
- [Microsoft Learn](#)



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Report Name: **Operations Report**
Workspace: **Operations**
Initial Report Release Date: **4/24/2025**

Version: **1.1.1**
Release Date: **05/01/2026**

New

- Poundage breakdown of source with yearly comparison created for 'Acquisition' and 'Distribution' tabs

Updated

- All outdated visuals are updated to support new visuals
- Poundage cards have prior year figures and % change in same location
- Model enhancements for visual interactions and streamlined refresh history

Previous Versions

Version Number	Details
1.0.1	Updated • Added new senior account to Senior Nutrition grouping in 'Distribution' tab • Relabeled Backpack grouping to 'Child Nutrition Activities' to capture all activities on accounts included
1.0.0	New • Reports created and released





Power BI Benefits

- Transform reporting from “as-needed” to “accessible now”
- One report can offer several views based on filters and staff needs
 - No more duplicated reports!
- Control access for departments
 - No unnecessary access to reports
- Low cost for non-profits