# **Snapshot Template Worksheet**

Introduction

A Performance Snapshot is a communication tool that you can develop to present the performance and value of your project, program and/or organization to partners, funders, staff and others who matter. It is tailored to your needs and the audiences you want to connect with.

The exact content and format of the Snapshot depends on the audience you want to reach and the issues that are important. The design process includes thinking about who the audience is, what decisions they are making and the messages you want to convey, and the information that can be presented (numeric, narrative, pictures, quotes, video) to tell your story. This depends on your needs and audience.

In this activity, you will outline the content for a Snapshot with a partner.

Before you begin your design:

Who is the key audience for the Snapshot?

How often will it be updated?

Do any overall visual(s) come to mind to illustrate the project?

Section 1: The need / challenge(s) you are addressing

Headline 1 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Headline 2 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Aspects that you may want to bring out:

This need is…

Growing

Hidden

Time Sensitive

Involves Misconceptions

Complex

Aligned with \_\_\_\_\_\_ Priorities

What evidence can you show to support the headlines?

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| --- |
|   |

Potential Information Sources:

Section 2: Your Solution

Headline 1 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Headline 2 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Aspects that you may want to bring out:

This approach is…

Proven

Innovative

Flexible

Grassroots

Targeted

Integrated

Catalytic

Sustainable

Efficient

Cost effective

What evidence can you show to support the headlines?

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Potential Information Sources:

Section 3: Your impact

Headline 1 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Headline 2 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Aspects that you may want to bring out:

Your impact in terms of …

Direct benefiaries

Others who benefit

Organization(s) / Sector

Society as a whole

Unexpected impacts

Research contribution

Societal cost

What evidence can you show to support the headlines?

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Potential Information Sources:

Section 4: Why you are well positioned to do this

Headline 1 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Headline 2 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Aspects that you may want to bring out:

Reputation

Experience

Expertise

Leadership

Connections to community

Awards

Media

What evidence can you show to support the headlines?

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Potential Information Sources:

Section 5: Looking ahead

Headline 1 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Headline 2 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Aspects that you may want to bring out:

Key Learnings

Next steps

Funding needs

Budget

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# **Short guide to Infographics and Data Visualization**

## Tools

1. **Office suite tools** (e.g. Microsoft, Google). There are many features to support graphic design, however file size can get cumbersome. For maximum flexibility use text boxes, shapes and images that are placed in front of the text and are not anchored to a point in the text. You can change this with a right click on your mouse and then selecting ‘wrap text’, ‘in front of text’. All elements can easily be copied between programs. Excel has built in tools to support data visualization.
2. **Graphic design** **programs** like InDesign, Illustrator, Photoshop. These all have a significant learning curve!
3. **Do-it-yourself infographic design tools**. (e.g. Piktochart <https://piktochart.com/>, Infog.ram <https://infogr.am/> Easel.ly <https://www.easel.ly/>) They have many templates and are fairly intuitive to use. You can try them without purchase but to publish high quality graphics, you need to pay more. You can usually publish on-line as a document, sometimes with interactive features.
4. **Business Intelligence Software**. These programs allow you to visualize data in fairly sophisticated ways (e.g. Tableau, [www.tableau.com](http://www.tableau.com), SAP Crystal Dashboard Design <http://www.crystalreports.com/dashboard/>)

Look for discounts directly through vendor or through TechSoup.ca

## Design tips:

1. Aim for two pages.
2. Limit your colour choices. Use colours that ‘go together’ (colour harmony). Pick colour scheme based on your logo, or a key photo in the snapshot. (see below)
3. Limit the number of fonts to 2. Use contrasting fonts and stay away from frilly fonts. Generally use **serif for body**, **non-serif for heading.**
4. Use white space effectively.
5. Use simple short text, keep it away from the edges.
6. Use an invisible grid. (align sections and elements in the design)
7. Use borders, shadows, contrast, complementary colours to draw special attention to something.
8. Use the right kind of figure/graph.

There are many great resources to learn more about design, and of course, turn to professional support to produce something polished.

### More about colours

It is really hard to match colours with your eye. It is better to find the code. If you don’t know it, you can use a program on the internet. Upload the image like <http://www.colorcodepicker.com/> and use the curser to move over your image to reveal the colour codes.

Once you have identified your colour(s) you can set the colour to them in your design program. If you want to learn about what additional colours may go well with this colour scheme, you can easily find this on-line with a program like: <http://www.color-hex.com/> These programs will show you what colours work well with this colour (shade and tint variations, complementary colours, etc.) and give you the code for those colours.

If you think you may print the snapshot out in black and white, print drafts out to see how they look. Sections that stand out in colour may not standout in black or white. Adjust one of the colour’s tint or shade to fix this.