Tip Sheet: Excel Spread Sheets

Professor Joannie Tremblay-Boire
Prepared for: Charity Insights Canada Project (CICP)
Community Education Centre (CEC): https://carleton.ca/cicp-pcpob/cec/

Phase 1: Aggregating Raw Data

Spreadsheet charts cannot easily read raw logs (like a list of 20 individual client visits). You must summarize your data into a table before building your graph.

The COUNTIF function: This function counts the number of times a specific word or value appears in a column.
Syntax: =COUNTIF(Where do you want to look?, What do you want to look for?)
Example: =COUNTIF(B$2:B$21, "Food Hamper")

Tip: Use the $ symbol in your ranges (like B$2:B$21) to "lock" the range. This ensures that when you use the fill handle to drag your formula down to the next row, Excel keeps looking at the exact same list of data!

Phase 2: Building the Basic Chart

Once you have a summary table (e.g., your list of Programs and their Total Visits), you can turn it into a visual.

Select your range: Highlight the summary table (both the text categories and the number totals). Do not highlight your raw data log.

Insert the chart: Go to the Insert tab, find the Charts group, and select 2D Clustered Bar (horizontal bars).

Tip: Sorting your data makes your chart easier to read. Click any number in your summary table totals, go to the Data tab, and select Sort (Smallest to Largest). Your horizontal bar chart will automatically flip so the largest bar is at the very top.

Phase 3: Decluttering and Labeling the Chart

Excel's default charts include distracting "chart junk" but often leave out important context.

Remove gridlines: Click directly on the vertical gridlines in the background of your chart to select them, then press [Delete] or [Backspace].

Add axis titles: Click your chart, then click the green + icon (Chart Elements) that appears in the top right corner next to the chart. Check the box for Axis Titles. Double-click the new text boxes to clearly label your data (e.g., typing "Number of Clients" for the bottom axis).

Direct labeling: Instead of making people trace a line down to the bottom axis, right-click the right edge of your bars and select Add Data Labels. The exact number will now sit right next to the bar.

Update the title: Double-click the default chart title to edit it.

Tip: Change the title from a generic label (like "Total Visits") to a clear takeaway message (like "Food Hampers Account for Most Client Visits").

Phase 4: Adding a Second Dimension

What if you want to break your data down further (e.g., splitting "Total Visits" into "First-Time" and "Returning" clients)?

The COUNTIFS function: This works exactly like COUNTIF, but lets you check for multiple things at the same time.
Example: =COUNTIFS(B$2:B$21, "Food Hamper", C$2:C$21, "First-Time")

Expand the chart: You don't need to build a new chart from scratch! Click your existing chart once. You will see a blue highlighted box appear around your data in the spreadsheet. Click the tiny square in the bottom corner of that blue box and drag it to include your new columns.

Tip: Excel will automatically update your graph to show two bars side-by-side for each category. Just make sure to check your Legend (using that same green + icon) so readers know which color represents which group!