

DASHBOARD REPORTING

Nonprofit leaders – both on the staff and the Board of Directors – often face challenges with balancing the demands of accomplishing their mission with the financial resources available. These challenges are made even greater when information is presented to decision-makers in an overwhelming and unclear manner.

The dashboard is a new tool that captures comprehensive information in a short, visual format that readily supports monitoring, evaluating and decision-making on an ongoing basis.

While the dashboard does not tell the reader which direction the organization is heading, it DOES tell the reader how the organization is performing, if assumptions are holding true, which aspects need to be watched and when action should be taken.

Some of the advantages that organizations have found from using the dashboard include:

- A shared understanding – at the beginning – of the key drivers of the organizations performance, both programmatically and financially;
- Improved systems to make sure that pertinent information is being captured; and
- Increased engagement among board and staff in all areas of the organization.

The dashboard is color coded red, yellow and green signifying the need for action:

- Green = “celebrate” Hitting goal or on target to hit goal.
- Yellow = “watch” Some action may be necessary in the future – there may be some action by staff.
- Red = “act” The goal is in serious jeopardy of not being met and some board action is require.

Dashboard dials can be created for a variety of organizational tasks with each dial containing 3 to 5 metrics. The most common dials are:

- Finance;
- Program;
- Fundraising;
- Governance;
- Human resources; and
- Risk management.

In today's environment of increased accountability, the dashboard allows all board members and senior staff to effectively and efficiently monitor the organization and delivers a conversation around those areas that require attention.

A sample dashboard is included on the next page:

| Dashboard | | Key | Red | Act Now | | | | | |
|---|-------------|-------------------|-----------|-----------|-------------|---|------------|-----------------|--------------|
| | | | Yellow | Monitor | | | | | |
| | | | Green | Celebrate | | | | | |
| Performance Indicators | Targets | Current Indicator | Trend | | | Comments | Ranges | | |
| | | | 6 mos ago | 1 yr ago | 1.5 yrs ago | | Celebrate | Monitor | Act Now |
| Fundraising | | | | | | | | | |
| New major donors | 5 or more | 3 | 2 | | | Mesaured against how many we want for the year. Donors who give more than \$1,000 | 5 or more | 3 | 2 |
| Major donors introduced by a board member | 5 or more | 5 | 5 | | | Measured against how many we want for the year. Not necessarily an "ask" - may be an introduction. | 5 or more | 3 | 2 |
| Donors who gave over \$100 last year, repeating this year | 56% or more | 53% | 60% | | | Dones as a % of total donors who gave \$100 in time period last year. | > 56% | 40-55% | < 30% |
| Fundraising event revenue - net | > \$20,000 | \$ 23,000 | \$ 20,250 | | | Proportionately to time of year - desired event revenue for 06-07 is \$20,000 net | > \$20,000 | \$18,000-20,000 | < = \$15,000 |
| Finance | | | | | | | | | |
| Surplus / deficit compared to budget | within 3% | 5% | 8% | | | Measured as % vs. % of year elapsed | w/in 3% | 3-10% | > 10% |
| Unrestricted liquidity | > 1.0 | 0.8 | 1.2 | | | Ratio = Current assets (Cash & Investments + Accounts Receivable - Restricted cash) / current liabilities | > 1.0 | 1 | < 1.0 |
| Unrestricted contributions (funding diversity) | 20% or more | 22% | 19% | | | % of individual, corporate & other contributed support to total revenue (excludes foundations) | >= 20% | 10-20% | < 10% |
| Human Resources | | | | | | | | | |
| Staff retention | 80% | 100% | 100% | | | % of staff with at least 1 year over total staff | 80% | 70% | 60% |
| Compensation study | 7-Feb | Not Done | N/A | | | next steps by 2/07 | Feb-07 | Before Feb-07 | After Feb-07 |
| Board Governance | | | | | | | | | |
| Attendance at board meetings | 90% | 100% | 100% | | | % of board at last 4 meetings | 90% | 80% | 70% |
| New nominees meeting criteria | 80% | 75% | N/A | | | % of new nominees meeting at least 6 of 9 established criteria | 80% | 70% | 60% |
| Focus on strategy and generative issues | 75% | 80% | 60% | | | % of meeting time during last 2 meetings spent on these issues | 75% | 60% | < 50% |
| Programs | | | | | | | | | |
| # of outreach presentations | 35 | 35 | 37 | | | Count each session regardless of topic | 35 | < 30 | 20 |
| Program Y Activity | 500 | 420 | 390 | | | Based on previous years' numbers and the strong emphasis on increasing #s | 500 | 375-500 | <= 375 |
| Program X Activity | 50 | 60 | 52 | | | Based on previous years' numbers with some anticipated growth built in. | 50 | < 45 | 35 |
| Average client satisfaction | 4.8 | 4.9 | 4.8 | | | Out of 1-5 scale. Don't have mechanism in place for averaging all evals. Need to work on consistency between program areas. | 4.8 | 4.3 - 4.0 | < 4.0 |