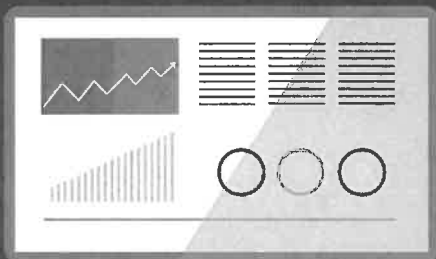
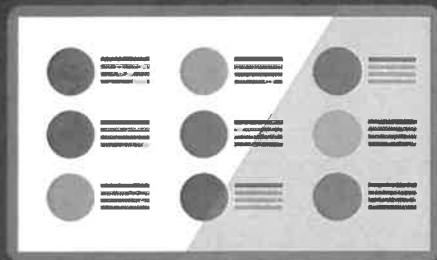
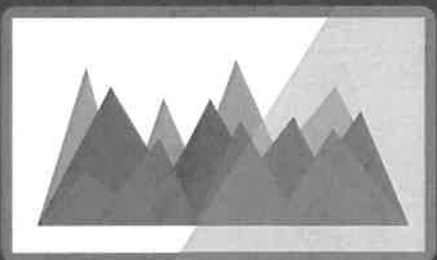
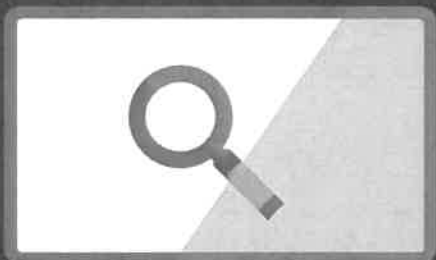


10



COMMON BENEFITS



OF DASHBOARD REPORTS

There are probably as many ways to work with dashboards to realize these benefits of critical thinking and board engagement as there are board members. The following are 10 common ways that have proven in practice to be valuable.

10 COMMON BENEFITS

of Dashboard Reports

1. SAVE TIME BY REVIEWING HIGHLIGHTS

Dashboards are not meant to be a substitute for all of the information available to boards, but rather are designed as high-level overviews that combine an array of key indicators on a single page or on sets of pages. This allows them to fit naturally in board books as cover sheets that may appear on top of more detailed reports or online as a top-level link in an increasingly detailed nest of links, thereby permitting the user to drill down to greater levels of detail as needed. Just as with any logistical or navigational tool, dashboards can help the time-constrained board member employ his or her time more efficiently by using highlighted items in the dashboard as prompts to seek more detailed information residing beneath.

2. TRACK PROGRESS TOWARD GOALS

Dashboards can be used as tools for monitoring progress toward agreed-upon goals. The scorecard dashboard style (samples in *The Nonprofit Dashboard*) explicitly incorporates actual performance versus goals or benchmarks. Another example of this is a vision dashboard created in the context of strategic planning. Each strategic initiative from the plan will have a set of measures that tell the board whether the intended effects of that initiative are being realized. A vision year is selected (maybe five or 10 years into the future) and the anticipated values for the various measures on the dashboard are set for that year. Depending on the time sensitivity of the measures in question, the board can request this dashboard at appropriate intervals (annually, semiannually, quarterly, etc.) and will be able to quickly gauge the progress (or lack thereof) that has been achieved in approaching the vision year value. Faced with inadequate progress, the board can ask some good questions as to underlying causes, which may result in changing certain policies and practices that will better ensure attaining the vision year goal in question, modifying the goal itself, or some combination of both.

3. UNDERSTAND SYSTEM DYNAMICS

A dashboard brings together a set of key ratios and other metrics in a way that conveys to the board the internal system dynamics of the organization. For those board members who have a limited understanding of how one factor can affect another in producing certain bottom line results, using a dashboard can become a valuable board education tool.

4. SPOT POTENTIAL PROBLEMS

Dashboards can be designed specifically as exception reports that alert the reader when certain performance metrics stray outside of acceptable ranges. These warning light reports and the scorecard dashboards that use traffic light icons (samples in *The Nonprofit Dashboard*) are only as good as the metrics and ranges selected. When these reports are well-constructed, boards can use them secure in the knowledge that certain critical factors are being closely monitored. If the board, for whatever reason, lacks confidence in an exception or icons-only style of reporting, dashboards that are more complete and yet structured around critical metrics (such as risk factors) can still serve to alert boards to potential problems in a timely manner.

5. IDENTIFY PATTERNS AND ANOMALIES AMONG SIMILAR ENTITIES

One of the most common uses of dashboards is to array on a single page the performance results of multiple programs or business operating units. This enables the user to efficiently discern any patterns that all programs or units share and/or any anomalies that may call out for explanation.

10 COMMON BENEFITS of Dashboard Reports

The use of small multiples is a good example of how a series of graphic displays that all employ the same scales quickly reveal which units have experienced positive or negative performance over the course of a year. Analyzing the same numbers in tabular form would be considerably more difficult and time consuming.

6. IDENTIFY PATTERNS AND ANOMALIES AMONG DIVERSE FACTORS

The same sort of rapid recognition of patterns and relationships can result from using dashboards that display on the same page a variety of factors or variables relating to a single entity.

7. EXPAND BOARD MEMBER COMFORT ZONES

If the board member asking the above questions is a member of the finance committee, one might assume that his or her special interest in the museum's financial condition prompted these queries, with the dashboard merely serving as a touchstone. But the board member might well have been a member of the curatorial committee who is typically far more interested in issues of an artwork's provenance or quality. When a dashboard's readily accessible metrics and graphic displays result in a board member expanding his or her comfort zone and becoming more fully engaged, then it's a gain for the entire board and organization.

8. BRING ALL BOARD MEMBERS UP TO SPEED AROUND A SHARED KNOWLEDGE BASE

The more board members are conversant with multiple aspects of the organization's operations, the more effective the board can be as a governing team and, hence, the more valuable the board can be to the organization. Dashboards by themselves will not supply the shared knowledge base the board needs, but they can serve as a recurring reminder of the key factors at play and thereby equip all board members with a basic understanding of what makes the place tick. Incorporating the most recent set of dashboards in each new board member's orientation packet, coupled with an opportunity to review them under the guidance of a fellow board member serving as mentor, would be an excellent way to begin the process of sharing this knowledge base.

9. MAINTAIN A GOVERNANCE PERSPECTIVE

When a dashboard is designed with a governance perspective (gauging things like mission impact and outcomes, strategic effectiveness, and fiduciary oversight), it helps to encourage the board to perform its essential governance role rather than derail into some form of surrogate management role. In other words, dashboards can help to instill an organization-wide, policy-level perspective and reduce the tendency to micromanage from the boardroom. In a sense, the very process of defining dashboard metrics can be viewed as a collaborative exercise between board and senior staff that serves to clarify the domains of governance and management.

10. REINFORCE BOARD OVERSIGHT BY LINKING TO STRUCTURE AND PROCESS

Finally, boards should be encouraged to use dashboards not only as stand-alone reports but also as key components in a more complete governance structure that also includes committee structure and meeting schedules and agendas.

Resource: [*The Nonprofit Dashboard: Using Metrics to Drive Mission Success, Second Edition*](#)

APPENDICES: SUPPORTING MATERIALS AND ADDITIONAL RESOURCES

Appendix I: LPS Academic Dashboard

LPS uses this dashboard to track not only proficiency based on quarterly benchmark assessments, but also college readiness and school culture metrics.

LPS Education Dashboard			April 18, 2007 Board Meeting						Last Updated: 4/12/2007				
			1		2		3		4		5		
			3rd Benchmark Assessment Results										
			% PRO+	% BAS	% PRO+	% BAS	% PRO+	% BAS	% PRO+	% BAS	% PRO+	% BAS	
ACADEMICS	English Overall	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	
	Grade 9	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	
	Grade 10	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	
	Grade 11	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	
	Grade 12	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	
	Math Overall	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	
	Algebra	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	
	Geometry	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	
	Algebra 2	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	
	Science Overall	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	
Biology	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%		
Chemistry	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%		
Soc Sci Overall	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%		
World Hist 9	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%		
World Hist 10	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%		
US Hist 11	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%	x%		
CA High School Exit Exam (CAHSEE) Results - Cumulative													
		% Passed		% Passed		% Passed		% Passed		% Passed		% Passed	
		English	Math	English	Math	English	Math	English	Math	English	Math	English	Math
Grade 10	2	x%	x%	?	x%	x%	?	x%	x%	?	x%	x%	?
Grade 11	2	x%	x%	?	x%	x%	?	x%	x%	?	x%	x%	?
Grade 12	2	x%	x%	?	x%	x%	?	x%	x%	?	x%	x%	?
Progress Towards Meeting UC (a-g) Credit Requirements													
		% On Track		% On Track		% On Track		% On Track		% On Track		% On Track	
Grade 9													
Grade 10		In Process											
Grade 11													
Grade 12													
Grade 12: HS Grad-Ready & College Admissions													
% HS Diploma Ready		In Process											
% 4Yr College Admitted		X%											
Student Culture													
Clubs/sports % involved		X%		X%		X%		X%		X%		X%	
		IN	OUT	IN	OUT	IN	OUT	IN	OUT	IN	OUT	IN	OUT
Transfers	?	y	y	y	y	y	y	y	y	y	y	y	y

LPS also uses a dashboard to track recruitment efforts and new hires.

LPS Recruiting Dashboard as of 4/1/07							
		Open Positions (FTE)			Hiring		
Open Positions	Total Budgeted	New Positions	Transfers Out	Attrition Estimate	Total Open Positions	Offers Pending	Transfers In
Region 1							
Teachers	16.50			4.50	4.50		
Admin	7.20	0.50		3.00	3.50		1.00
Total	23.70	0.50		7.50	8.00		1.00

Appendix II: Aspire's Financial Dashboard

	CURRENT ENROLLMENT	Region 1					
		School #1	School #2	etc.			
		#	#	#	#	#	#
	Net change from 9/15/06	x	x	x	x	x	x
ADA	January	x%	x%	x%	x%	x%	x%
	February	x%	x%	x%	x%	x%	x%
	March	x%	x%	x%	x%	x%	x%
Re-enroll	% of enroll	x%	x%	x%	x%	x%	x%
	% from feeder	x%	x%	x%	x%	x%	x%
Wait list	06-07						
	#	y	y	y	y	y	y
	% of enroll	x%	x%	x%	x%	x%	x%
Transfers Out	January-07	-	-	-	-	-	-
	February	-	-	-	-	-	-
	March	-	-	-	-	-	-
FTE forecast (thousand)	05-06	\$X	\$X	\$X	\$X	\$X	\$X
	January	\$X	\$X	\$X	\$X	\$X	\$X
	February	\$X	\$X	\$X	\$X	\$X	\$X

KEY SCHOOL DEMOGRAPHICS

Enrollment Breakdown

Staffing

Avg Class Size	20.5	x
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Schoolwide Enrollment

Students at full enrollment below expected enrollment

indicates 5% increase/decrease over previous month's enrollment

[illegible]

2006-07 8th Attrition, by Reason

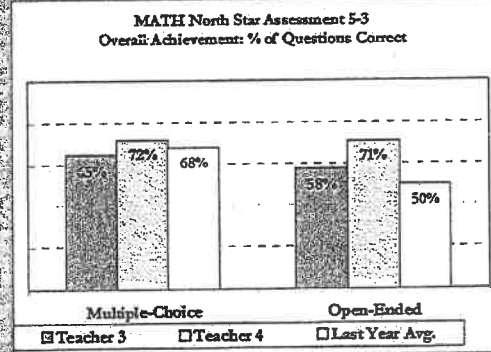
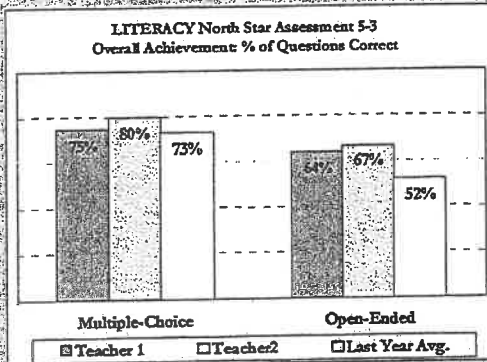
Reason	Percentage
Mission and Culture Fit	34%
Academic	33%
Mobility	33%
School Programs	0%
Personal	0%

[illegible]

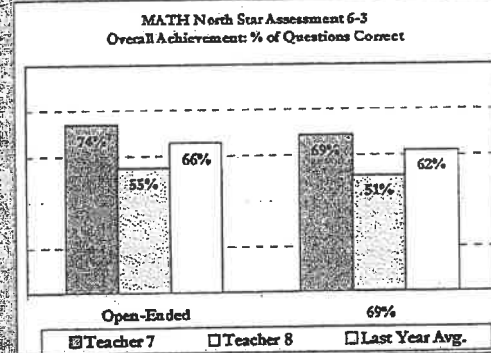
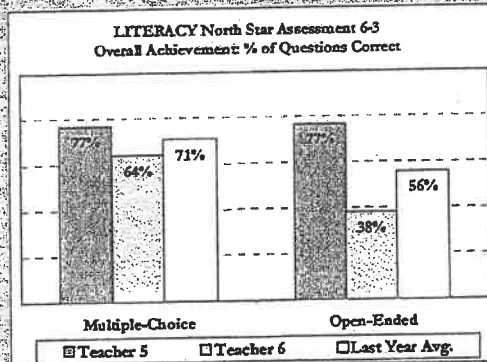
Appendix III continued: Uncommon's Academic Dashboard

STUDENT ACHIEVEMENT: INTERIM ASSESSMENT DATA

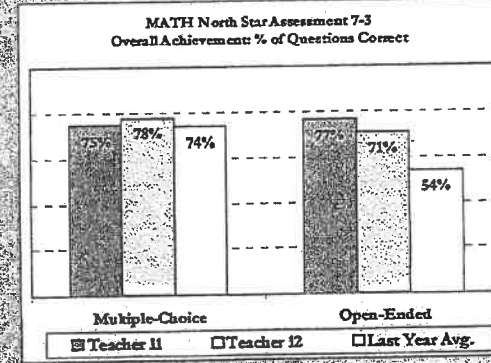
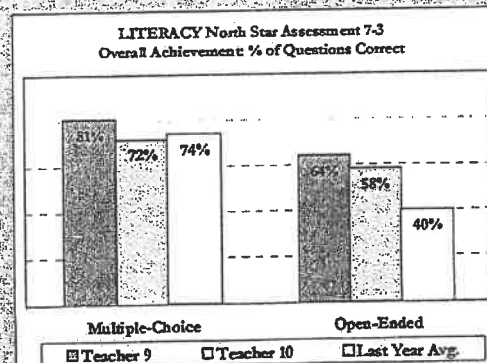
Grade 5



Grade 6



Grade 7



Appendix IV: Sample Performance Dashboard Measures

ACADEMIC DATA

- Percentage Proficient on standardized tests
- Number of Correct Scores on interim assessments (by question)
- Percentage Proficiency + and Basic + on interim assessments by subject
- Power standards (percentage correct, listed by standard)
- Percentage passing high school exit exam
- State rankings
- Progress toward meeting credit requirements
- Percentage high school diploma-ready
- Percentage graduated
- Percentage admitted to 4-year college
- Improved in writing (2 levels of growth)

ORGANIZATIONAL DATA

- Demographics
- Enrollment
- Average Daily Attendance
- Student Attrition/ Number of Transfers Out
- Staff Attrition (and reasons for)
- Average Class Size/ Student Ratio
- Waitlist by month (year to year)
- Re-enrollment rate
- Percentage of students involved in clubs/sports
- Staff total open positions/offers pending/positions to be filled
- Staff diversity statistics
- Drop Outs
- Suspensions
- Number of Parent Volunteer Hours
- Community Service Hours
- Teacher Grade for school (teacher satisfaction)
- Parent Grade for school (parent satisfaction)
- Teacher performance (score created in teacher evaluation)

FINANCIAL DATA

- YTD Revenue
- YTD Expense
- YTD Income
- YTD Cash Balance
- Per Pupil Expenditures
- Per Pupil Income
- Variances to date
- Supplemental Hours
- Fundraising (School-based and central office)
- Facility Cost/Quality



Get your
board talking
about some
very important
issues

Instructions for the introductory worksheet in

Building a Dashboard

Purpose

This exercise will help your board get started creating a Dashboard Report for board or committee meetings.

Instructions

Make copies of this worksheet for each person at your board or committee meeting. Have the board chair review the handouts beforehand in order to guide everyone through the activities. You may want to have key staff complete the exercise as well. Your board may choose to complete this worksheet individually or collaborate in teams of 2 or 3.

Follow-Up

Assign someone to compile the data from the 10 Minute Board Exercise. As a group, discuss which categories and indicators will be most helpful to include. You may want to assign the Dashboard Report to a committee or ad-hoc team to implement and check-in on progress on your Dashboard Report. See the "research tips" below to help the committee develop the dashboard.

Research tips for the Dashboard Committee or team:

1. Using the compiled information from the exercise, get a feel for the most popular indicator requests and determine what you most need to track. Start out with a few key aspects on your Dashboard knowing that you will build it up and make changes over time. *Overall, less is more when it comes to a Dashboard.*
2. Talk with similar organizations that have already started using a Dashboard and get examples, if possible, so you can see what is working for other organizations.
3. Is information for each component that you would like to include on your Dashboard currently available?
 - ❖ If it is, who collects it and in what format is it reported?
 - ❖ If not, what resources are available to gather the needed information, what processes would need to be put into place to collect it, and how costly would it be to collect? Sometimes it is not worth the resources it would take to gather and present certain data versus what that data will tell you - you need to be mindful of your 'return on investment'.
 - ❖ Once you have chosen which indicators to track, define ranges for each to determine what would constitute a warning or celebration.
 - ❖ How would you present the information on your dashboard - a pie chart, or a bar graph? There are many ways to present data and information and your Dashboard Team will want to determine the most appropriate format.

Remember: The report will evolve over time. Start with a simpler Dashboard and build from there.

This 10 Minute Board Exercise was developed in collaboration with:

Adrienne Graham, owner - Leapfrog Training & Facilitation

Leapfrog provides customized training, facilitation, coaching and support services to help increase the vitality and effectiveness of non-profits and community organizations. Visit Adrienne at www.leapfrogtraining.com



Disclaimer: This information is not a substitute for competent legal and accounting advice rendered on your particular fact situation and planning goals. Laws and procedures change frequently and are subject to different interpretations.

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Building a Dashboard

Step 1: Selecting your Dashboard indicators

Think about a dashboard on your car. What key indicators are provided and how they are displayed to help you as a driver? Use this exercise to help you decide which organizational gauges would help you as a board member.

Pick the top three categories from the items below that you would like to see included on a dashboard report at board meetings. You may also select some that are not on this list—that's OK! Which of the following categories would be a good place to start your Dashboard?

Dashboard Categories

- ☐ Fundraising goals
- ☐ Grant deliverables
- ☐ Finances
- ☐ Strategic planning goals and strategies
- ☐ Program goals
- ☐ Staffing
- ☐ Volunteers
- ☐ Members

- ☐ Marketing goals
- ☐ Communications (internal or external)
- ☐ Social networking
- ☐ Technology
- ☐ Demographics
- ☐ Client satisfaction
- ☐ Risk factors

Other:

- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____
- ☐ _____

Step 2: Expanding on your selections

From your selections above, list what type of information would be most helpful for the board to monitor within each category - what would you like to measure and follow over time. Be selective! You want to focus on what will really inform you in your role as a board member and what is important to your organization to focus on. A list of sample indicators is provided on the following page.

Category 1: _____

Category 2: _____

Category 3: _____



Get your board talking about some very important issues

Examples for the worksheet in

Building a Dashboard

Sample Dashboard Indicators

Below are three sample categories and a list of potential areas of focus for each category.

Category 1: Fundraising Goals

- Funding mix
- Number of donors (or NEW donors)
- Number of memberships (or # of NEW members)
- On track to meet overall goal?
- Number of event sponsorships

Category 2: Finances

- # of months of cash in reserve
- Are we on track to meet revenue goals?
- Expenses within 10% of budget
- Monthly trends (year-over-year)

Category 3: Volunteers

- Number of new volunteers
- Number of volunteer hours
- Number of open positions
- Turnover rate

Dashboard Example

A simple dashboard can be created to provide a snapshot of key indicators. Use only the most useful categories / indicators to keep the dashboard simple, streamlined, and relevant.

Note: These examples are based on a fictional nonprofit and are not best practice benchmarks.

Funding Mix



- Grants 15%
- Earned Income 55%
- Donations 30%

Month-End Trends

	Mar 2014	Mar 2013	Mar 2012
Revenue	\$8,250	\$7,900	\$7,250
Expenses	\$6,900	\$6,500	\$6,200

Months of Cash

March	February	January	Average
3.7	3.9	3.5	3.7

Fundraising

	This Month	Monthly Goal
# of New Donors	29	30
	YTD	YTD Goal
Total Donors	80	90
Total Raised	\$4,500	\$7,500



Disclaimer: This information is not a substitute for competent legal and accounting advice rendered on your particular fact situation and planning goals. Laws and procedures change frequently and are subject to different interpretations.

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