



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



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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: _____



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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