

# How to Develop an Organizational Dashboard

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Marissa M. Tirona  
Project Director

**CompassPoint**  
NONPROFIT SERVICES

# Session Objectives

- Understand the purpose of using a dashboard tool for measuring and tracking organizational performance;
- Understand the process for selecting dashboard indicators and ranges;
- Understand the considerations for implementation;
- Understand how to develop and maintain the dashboard tool; and
- Receive sample indicators and dashboards.

# The Dashboard: A Tool for Measuring Impact

*We have more information now than we can use, and less knowledge and understanding than we need. . . . The true measure of any society is not what it knows but what it does with what it knows.*

- Warren Bennis

# Why Implement a Dashboard?

- It provides a simplified holistic view of the organization's performance so that its readers are not overwhelmed and analysis delayed.
- It provides members of the organization (staff and board) with a commonly understood language by which to discuss organization performance and support better decision-making.
- It can make visible those things that may be important to an organization but otherwise go undetected.
- The process of developing a dashboard, in and of itself, is valuable as it facilitates a healthy dialog about what you believe are the most important data to track and monitor.

# Developing a Dashboard: Where to Start?

- “Burning Issues:”
  - *Number of Carbon Offsets*
- Strategic Plan:
  - *13 out of 14 programs meet service deliverables*
- General Organizational Health:
  - *Number of classrooms served*

ABC Nonprofit 2007 Performance Indicators		Key	Act Now			Status	Source/Comment
			Monitor				
		Celebrate					
Indicators	Target	Trend/Result			Status	Source/Comment	
		1 year	6 months	Current			
<b>Category 1</b>							
Indicator 1	n%					Database 1	
Indicator 2	n%					Staff Person A	
Indicator 3	n					Report A	
<b>Category 2</b>							
Indicator 1	n%					Database 1	
Indicator 2	n%					Staff Person A	
Indicator 3	n					Report A	
<b>Category 3</b>							
Indicator 1	n%					Database 1	
Indicator 2	n%					Staff Person A	
Indicator 3	n					Report A	
<b>Category 4</b>							
Indicator 1	n%					Database 1	
Indicator 2	n%					Staff Person A	
Indicator 3	n					Report A	
<b>Category 5</b>							
Indicator 1	n%					Database 1	
Indicator 2	n%					Staff Person A	
Indicator 3	n					Report A	
<b>Category 6</b>							
Indicator 1	n%					Database 1	
Indicator 2	n%					Staff Person A	
Indicator 3	n					Report A	
<b>Category 7</b>							
Indicator 1	n%					Database 1	
Indicator 2	n%					Staff Person A	
Indicator 3	n					Report A	

ABC Nonprofit				Key	Act Now		
Indicator Range Key					Monitor		
					Celebrate		
Indicator	Target	Color Key			Source/Comment		
<b>Category 1</b>							
Indicator 1	n%	90-100%	75-89%	<75%	Database 1		
Indicator 2	n%	90-100%	75-89%	<75%	Staff Person A		
Indicator 3	n	3.5+	3.0-3.4	<3.0	Report A		
<b>Category 2</b>							
Indicator 1	n%	90-100%	75-89%	<75%	Database 1		
Indicator 2	n%	70-80%	60-69%	<60%	Staff Person A		
Indicator 3	n	3.5+	3.0-3.4	<3.0	Report A		
<b>Category 3</b>							
Indicator 1	n%	70-80%	60-69%	<60%	Database 1		
Indicator 2	n%	4	3	<3	Staff Person A		
Indicator 3	n	3.5+	3.0-3.4	<3.0	Report A		
<b>Category 4</b>							
Indicator 1	n%	90-100%	75-89%	<75%	Database 1		
Indicator 2	n%	70-80%	60-69%	<60%	Staff Person A		
Indicator 3	n	140-150	125-139	<125	Report A		
<b>Category 5</b>							
Indicator 1	n%	90-100%	75-89%	<75%	Database 1		
Indicator 2	n%	90-100%	75-89%	<75%	Staff Person A		
Indicator 3	n	3.5+	3.0-3.4	<3.0	Report A		
<b>Category 6</b>							
Indicator 1	n%	90-100%	75-89%	<75%	Database 1		
Indicator 2	n%	90-100%	75-89%	<75%	Staff Person A		
Indicator 3	n	3.5+	3.0-3.4	<3.0	Report A		
Indicator 4	n	3.5+	3.0-3.4	<3.0	Staff Person B		
<b>Category 7</b>							
Indicator 1	n%	70-80%	60-69%	<60%	Database 1		
Indicator 2	n%	4	3	<3	Staff Person A		
Indicator 3	n	3.5+	3.0-3.4	<3.0	Report A		
Indicator 4	n	3.5+	3.0-3.4	<3.0	Staff Person B		

**Sample Dashboard (1)**

<b>Key</b>		Act Now
		Monitor
		Celebrate

Indicator	Annual Target	Trend/Result			Cum. Status to Target	Comment
		Q407	Q307	Q107		
<b>Programmatic</b>						
1. Average participant satisfaction rating	3.5 / 4			3.3	3.5	YTD average
2. Staff responsiveness and follow through	3.5 / 4			3.5	3.6	YTD average
3. Likelihood to refer others to program	3.5 / 4			3.8	3.5	YTD average
4. Workshops at 75% of max. attendance or higher	80%			61%	68%	YTD average
5. Overall quality of program	4.25 / 5			4.6	4.6	YTD average
6. Number of center visitors	450			162	267	annual goal
7. Number of presentations to colleges	20 / year			9	22	annual goal
<b>How We Work Together</b>						
8. No. of professional development staff trainings	4 / year			2	2	From HR
9. Percent of staff monthly paperwork on time	100%			89%	0.92	YTD average
10. Percent attendance at All-Staff Day meetings	100%			0.95	0.93	YTD average
11. Number of staff appreciation events	4 / year			3	3	annual goal/1 per qtr
<b>Financial</b>						
12. Earned revenue	1,187,400			162,680	470939	Jan-May prorated=494,750
13. Number of new contracts opened	150			24	51	annual goal/1/2 of goal =75
14. Average value of contracts opened	7,500			10,100	7811	YTD average
15. Income Program A	1,387,000			130,027	367,939	Jan-May prorated=577,916
16. Income Program B	1,281,000			119,021	276,986	Jan-May prorated=533,750
<b>Governance</b>						
17. Percent in attendance at board meetings	100%			62%	69%	YTD average
18. New board members added	4 / year			0	3	annual goal
19. Percent of board members making annual gift	100%			0	15%	annual goal
<b>Fund Development</b>						
20. Number of individual donors, excluding board	100			7	75	annual goal
21. Number of new corporate donor/sponsors	4 / year			0	1	
22. Percent funders retained from prior year	80%			14%	37%	

**Sample Key (1)**

<b>Key</b>		Act Now
		Monitor
		Celebrate

Indicator	Target	Color Key			Source/Comment
<b>Programmatic</b>					
1. Average participant satisfaction rating	3.5 / 4	3.5+	3.0-3.4	<3.0	from evaluation tool
2. Staff responsiveness and follow through	3.5 / 4	3.5+	3.0-3.4	<3.0	from evaluation tool
3. Likelihood to refer others to program	3.5 / 4	3.5+	3.0-3.4	<3.0	from evaluation tool
4. Workshops at 75% of max. attendance or higher	80%	75-80%	70-75%	<70%	from database
5. Overall quality of program	4.25 / 5	4.25+	3.5-4.24	<3.5	from database
6. Number of center visitors	450	425+	351-425	<350	from center sign-in sheets
7. Number of presentations to colleges	20 / year	15-20	10 to 14	<10	from program director
<b>How We Work Together</b>					
8. No. of professional development staff trainings	4 / year	4	3	<3	from HR
9. Percent of staff monthly paperwork on time	100%	90-100%	75-89%	<75%	from HR
10. Percent attendance at All-Staff Day meetings	100%	90-100%	75-89%	<75%	from HR
11. Number of staff appreciation events	4 / year	4	3	<3	from HR
<b>Financial</b>					
12. Earned revenue	1,187,400	1,100,100+	1 - 1,099,000	<1,000,000	from finance director
13. Number of new contracts opened	150	140-150	125-139	<125	from finance director
14. Average value of contracts opened	7,500	7,000+	6,000-6,999	<6,000	from finance director
15. Income Program A	1,387,000	1,250,000+	1.15-1.249 mil	<1.15 mil	from finance director
16. Income Program B	1,281,000	1,200,000+	1.0-1.199 mil	<1.0 mil	from finance director
<b>Governance</b>					
17. Percent in attendance at board meetings	100%	90-100%	75-89%	<75%	from executive director
18. New board members added	4 / year	4	3	<3	from executive director
19. Percent of board members making annual gift	100%	90-100%	75-89%	<75%	from development
<b>Fund Development</b>					
20. Number of individual donors, excluding board	100	90-100	75-89	<75	from development
21. Number of new corporate donor/sponsors	4 / year	4	3	<3	from development
22. Percent funders retained from prior year	6 / year	>5	4 to 5	<4	from development

# Dashboard Opportunity

- Agree on what matters
- Agree on targets
- Agree on R/Y/G values
- Engage across roles/departments
- Educate and empower staff and board members

# Implementation Questions

- When?
- Who manages the document/process?
- Distribution?
- Update frequency?

# The Dashboard: Helping it Take Root in Your Organization

*Organizational culture eats strategy for breakfast.*

- *Thomas A. McLaughlin, Nonprofit Strategic Positioning: Decide Where to Be, Plan What to Do*

## Additional Resources

- Butler, L.: [The Nonprofit Dashboard: A Tool for Tracking Progress.](#) (BoardSource: 2007)
- Saul, J.: [Benchmarking for Nonprofits: How to Measure, Manage and Improve Performance.](#) (Wilder Foundation: 2004)

# Contact Information

Marissa Tirona: [marissat@compasspoint.org](mailto:marissat@compasspoint.org)

415.541.9000

[www.compasspoint.org](http://www.compasspoint.org)