

Dashboards

Feedback that Matters and Creates the
Right Discussions

Discussions and Decision-Making that Matter

- Monitoring Progress
- Evaluating assumptions
- Making Decisions



- Outcomes Strategy
- Asset allocation
 - Investments
 - Expenditures
- Asset engagement
- Business model
- Infrastructure

What Does it Take to Answer the Question...

Are we **effectively** and **efficiently**
investing the **assets** the
organization shepherds to
advance community benefit and
achieve our outcomes in a manner
that is viable over time?

What are we actually doing?
(outputs and transactions)

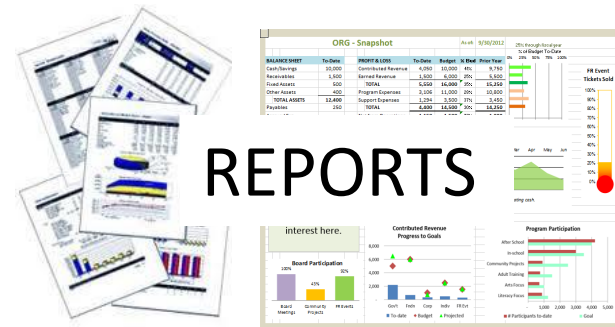
How well are we doing it?
(quality of outputs AND
use of inputs and resources)

What difference does it make?
(so, what actually improved)

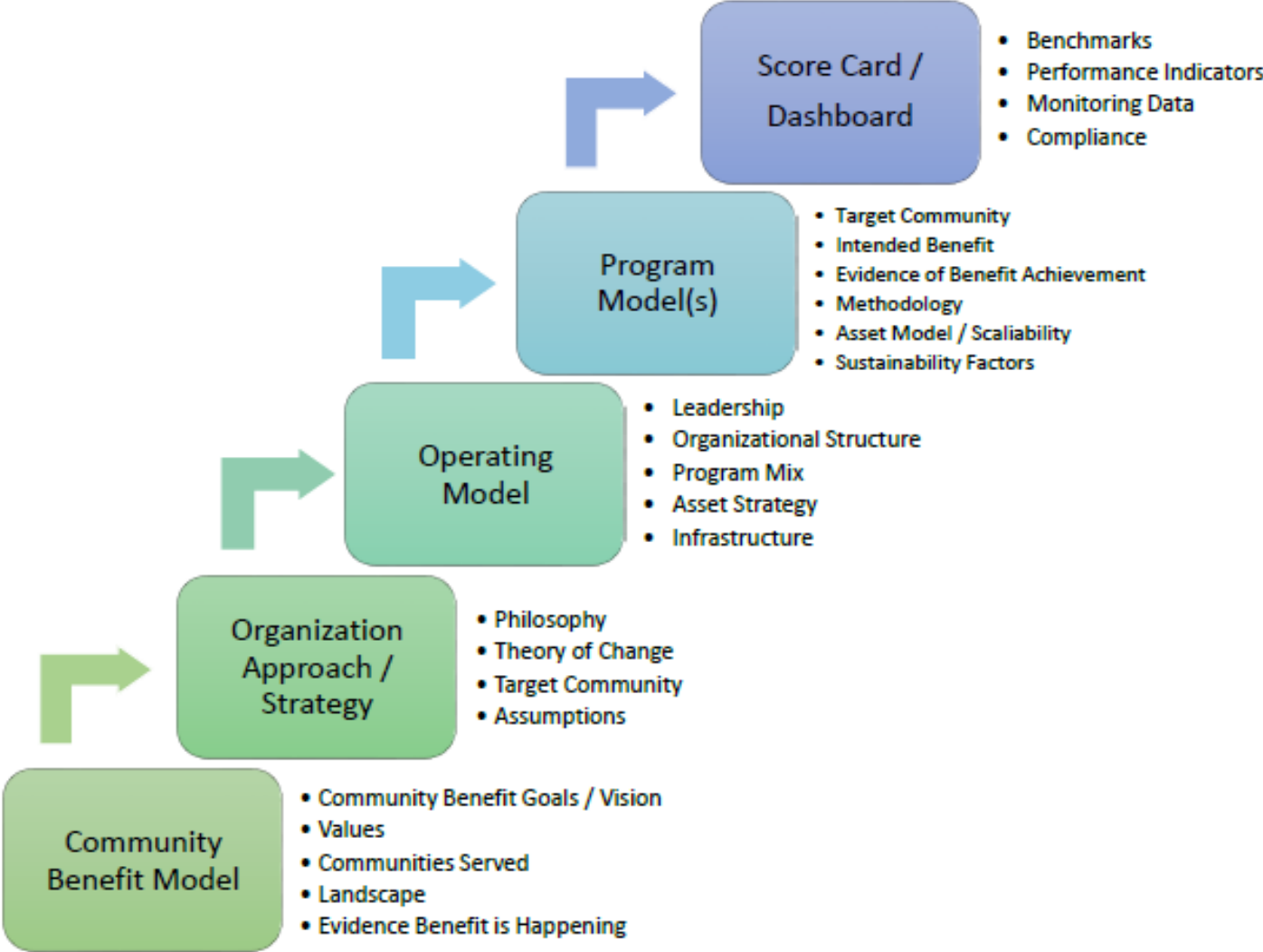
Connecting Outcomes to Operations



Program (Distinct Organizational Efforts)	Outcome					
	Outcome	Outcomes	Outcome	Outcome	Outcome	Outcome
STRATEGY SCREEN						
Program	P	3	1	3	3	3
	E	3	1	3	3	3
Program	P	2	N	N	3	2
	E	2			3	2



Context



Making Dashboard's Meaningful

What is needed as a foundation?

- Articulated business and program models
- Strategies and budgets
- Commitment to Engagement

How to get started?

- Agree on
 - Categories and indicators. Common categories include: Financial, HR, Program, Fundraising
 - Target or measure of success
 - The audience
- Focus on Engagement
 - What do you want the audience to discuss and decide
 - Determine what it will take to encourage that

Considering Audiences

Stewards & Stakeholders

- Vision Advancement
- Mission Alignment
- Resource Acquisition & Allocation
- Sustainability

Strategists

- Conditions (internal & external)
- Systems / Models / Plans

Doers

- System Effectiveness
- Resource Utilization

Considering Audiences

Stewards & Stakeholders

- Vision Advancement -> Community Change
- Mission Alignment -> Organization Scope & Approach
- Resource Acquisition & Allocation -> Business Model
- Sustainability

Strategists

- Conditions (internal & external) -> Environment Changes
- Systems / Models / Plans -> Program Models / Design

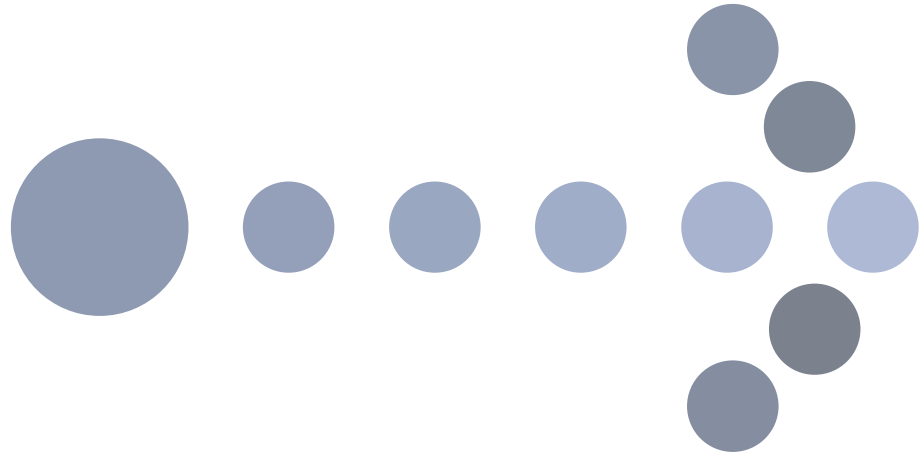
Doers

- System Effectiveness -> Transaction Quality
- Resource Utilization -> Efficiency

Starting Point

Start with...your audience and goal not your data

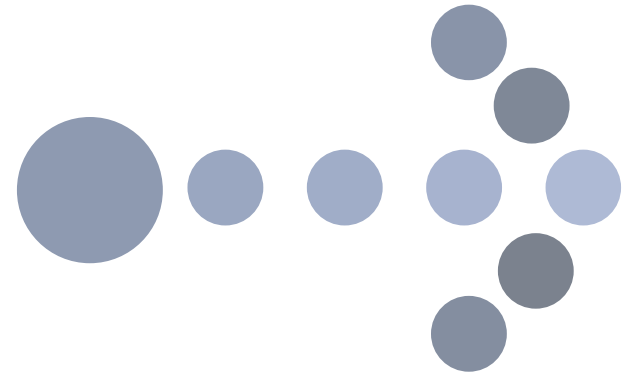
What types of
decisions and
actions do you
want your
audience
engaged in?



Starting Point

Next ... what do THEY need

**What do they
need to feel, be
able to do, have,
and/or
understand in
order to do
those things**



Choose Wisely About What to Measure

- ✦ Organizational Benefit (Return on Mission)
- ✦ Program Metrics
- ✦ Model Testing
- ✦ Service Level & Quality Targets
- ✦ Stakeholder Loyalty
- ✦ Human Resources/Volunteers
- ✦ Financial Metrics
- ✦ Fundraising & Revenue Targets
- ✦ Compliance/Risk Management
- ✦ Governance



Meaningful, measurable, specific, understandable and time friendly

Developing Your Own Dashboard Data

Determining what to put on your dashboard

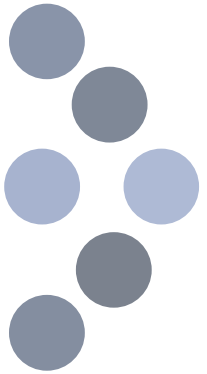
Look to

- Vision mapping
- Program modeling
- Budget
- Financial reports
- Strategic plan objectives
- Fundraising reports
- Compliance reports
-

Starting Point

Then ... what data

**What
knowledge-base,
information, and
opportunities
will support
them in this**



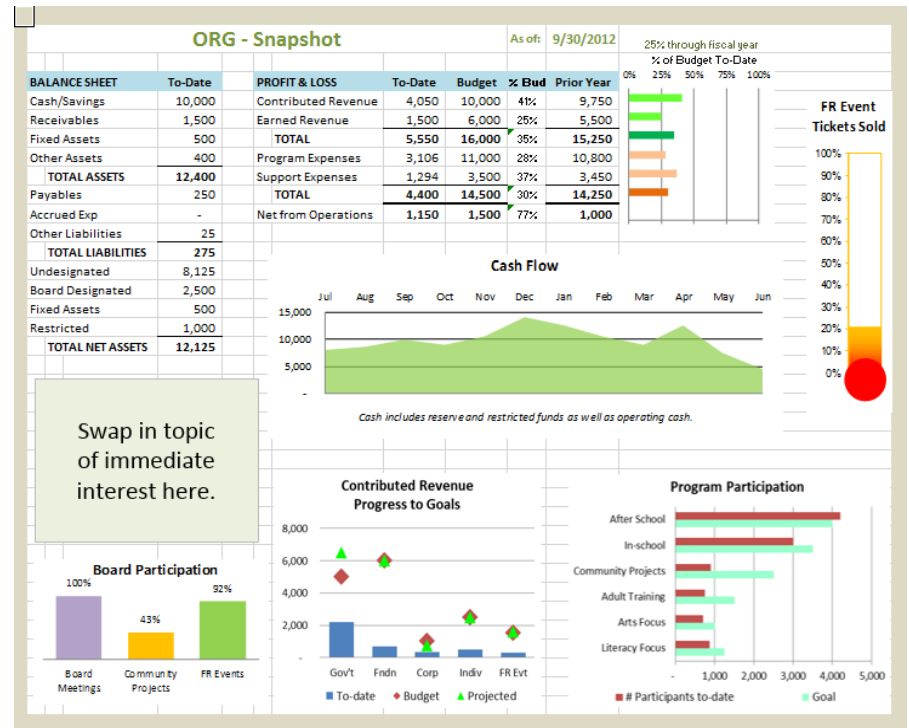
Many Forms

Macro



Evaluates our overall approach / strategy

Micro

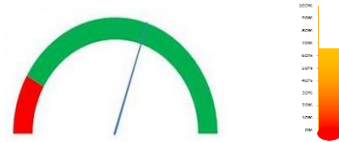


Evaluates our overall execution

Considering Tools

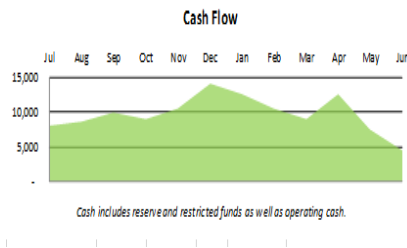
Dials

- Thresholds



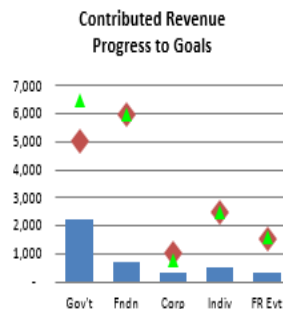
Area / Line Charts

- Trends



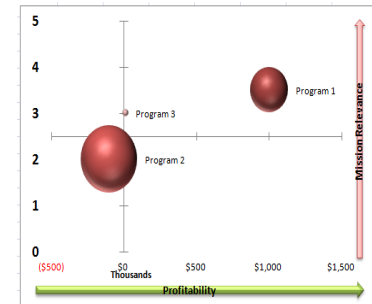
Bar

- Trends
- Comparisons



Plots

- Distributions
- Positions
- Relationships



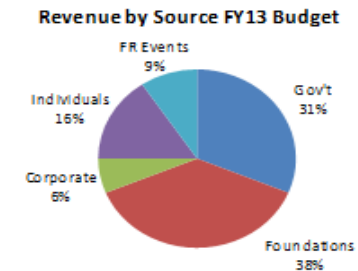
Tables

- Absolute / Raw Data

PROFIT & LOSS	To-Date	Budget	% Bud	Prior Year
Contributed Revenue	4,050	10,000	41%	9,750
Earned Revenue	1,500	6,000	25%	5,500
TOTAL	5,550	16,000	35%	15,250
Program Expenses	3,106	11,000	28%	10,800
Support Expenses	1,294	3,500	37%	3,450
TOTAL	4,400	14,500	30%	14,250
Net from Operations	1,150	1,500	77%	1,000

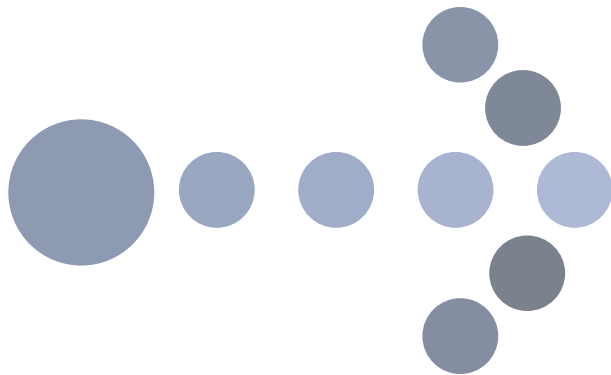
Pie

- Proportion



Starting Point

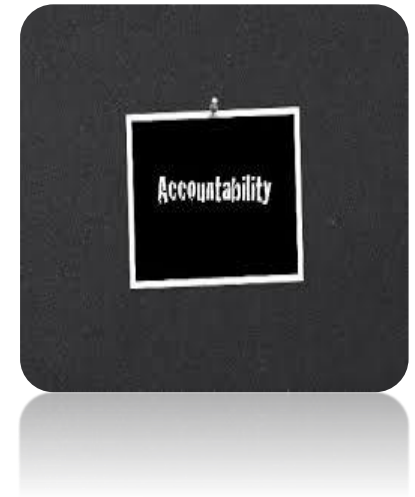
Finally ... a design



**What form
should the data
presentation
take?**

Dashboard Implementation

- Who is responsible for managing process and tools
- How frequently are they updated/presented
- When, how, and to whom are they presented and discussed
- How do they inform and align with other planning processes (budgeting, strategy, etc)



Dashboard Design Recommendations

Design

- Make it a single page **if possible AND practical**
- If it's too big to fit, change the level of detail or create sub-Dashboards.

Ensure adequate context

- Choose your comparison carefully – Projections? Standards? Time? Quality?

Use an appropriate level of detail

- Get to the heart – skip the detail.
- Don't clutter with unnecessary information
- Limit to key indicators relevant for that level of dashboard.

Keep design simple

- Use design & color judiciously.
- Mix visuals and data tables.
- Usability is key!

Templates – Consistency and Efficiency

Demo options

Reflection

- Your Biggest Take Away or Aha

