

Nonprofit Dashboards to Stay Informed and Make Decisions

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Accountants and Consultants

Start with the end in mind!

“What gets measured, gets done. What gets rewarded gets done well.” – *Unknown*

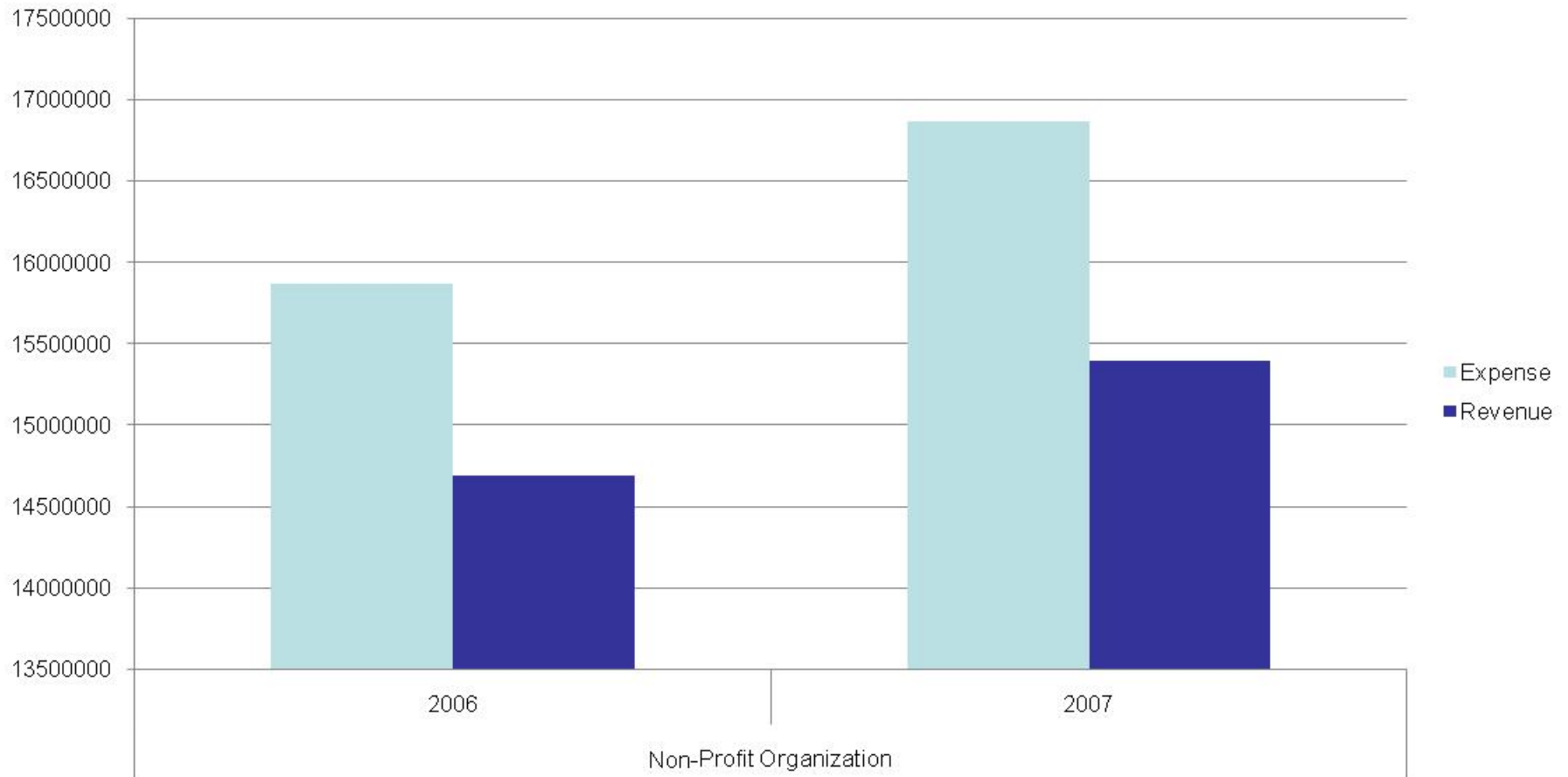
“We have more information now than we can use, and less knowledge and understanding than we need... The true measure of any society is not what it knows but what it does with what it knows.” – *Warren Bennis*

“When you can measure what you are speaking about, and express it in numbers, you know something about it; but when you cannot measure it, when you cannot express it in numbers, your knowledge is of a meager and unsatisfactory kind; ...” – *Lord Kelvin*

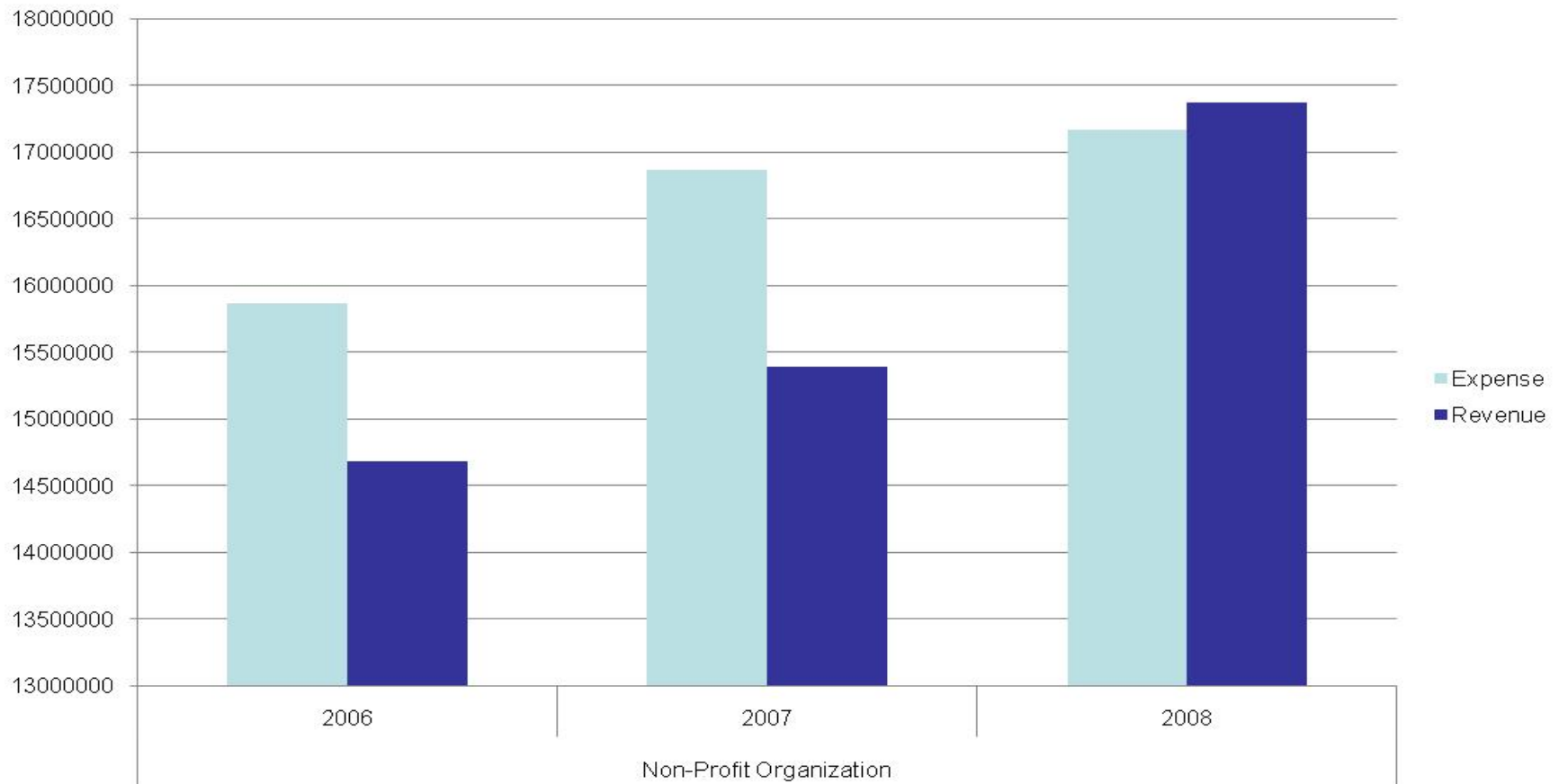


A dashboard is a tool used to place information within the context of a comparison or an expectation which is then translated into a graphic or table presentation

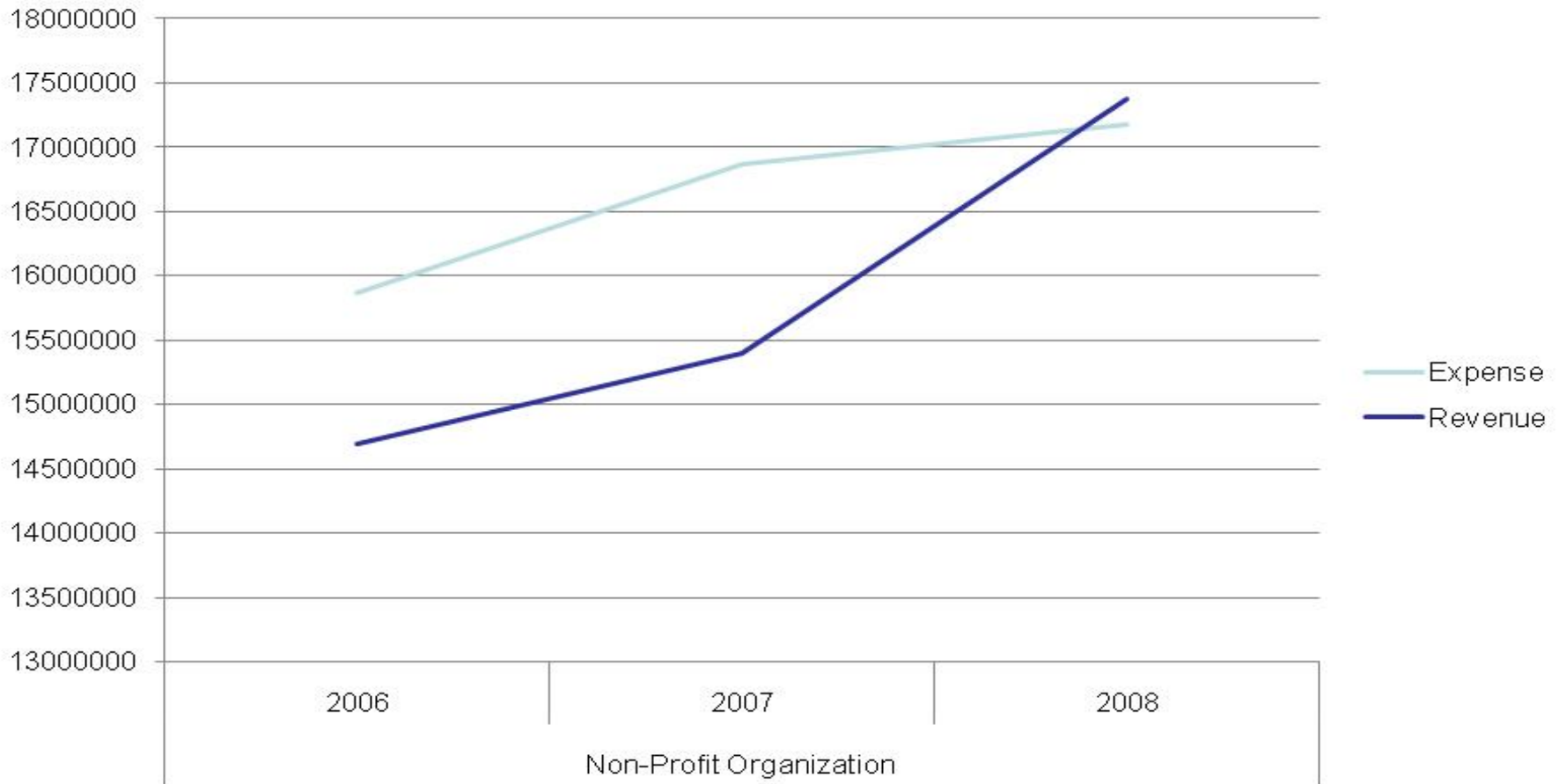
A dashboard points to the need for action in the form of decision making



A dashboard points to the need for action in the form of decision making



A dashboard points to the need for action in the form of decision making



Does my nonprofit sector influence my dashboards?

- Charities



- Health



- Education



- Associations



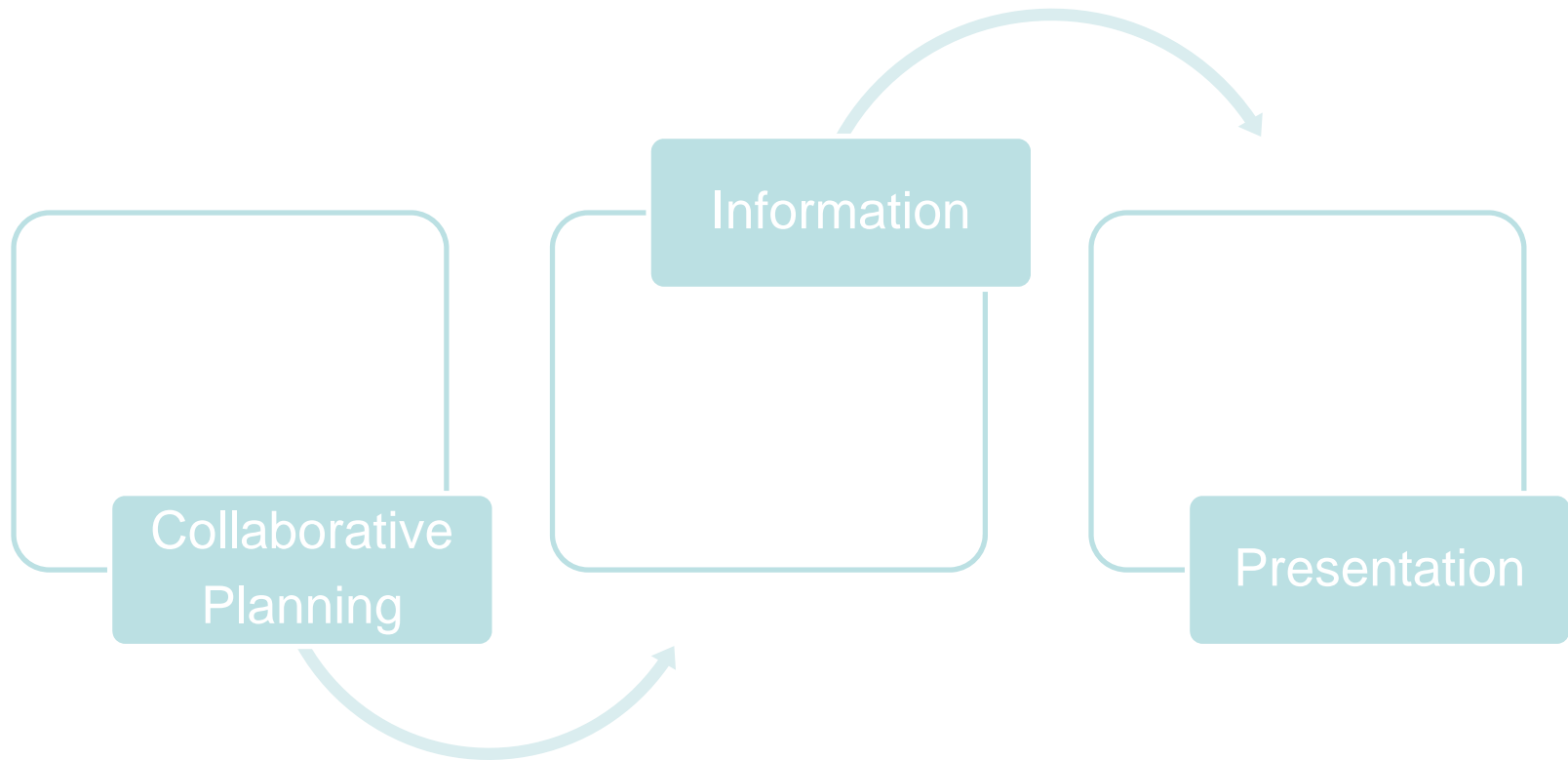
- Foundations



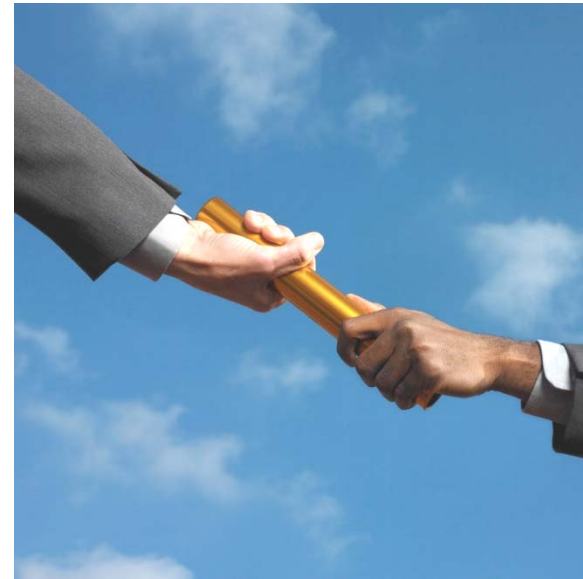
- Arts



Dashboard process flow



Planning and designing a meaningful dashboard requires a collaborative effort to be effective



Planning and design phase – Setting expectations

Determine who are the users

- Internal



- External






Planning and design phase – Setting expectations

What is important?

- Fund development
- Human resources / internal processes
- Boards / governance
- Programs
- Finances
- Marketing / communications
- Volunteer management
- Technology
- Membership
- Facility / residential
- Others



Planning and design phase – Setting expectations Which indicators best measure what's important?

A good resource may be found from Compass Point at:

http://www.tacticalfundraising.com/uploads/Compass_Point_Dashboard.pdf



Planning and design phase – Setting expectations

How do we set our
targets and ranges?



Planning and design phase – Setting expectations

What is your unit of measure?



Planning and design phase – Setting expectations

What time period is relevant to your measurement and expectations?

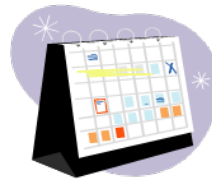
Planning and design phase – Setting expectations

When does the user need to have the information?

- Specific date



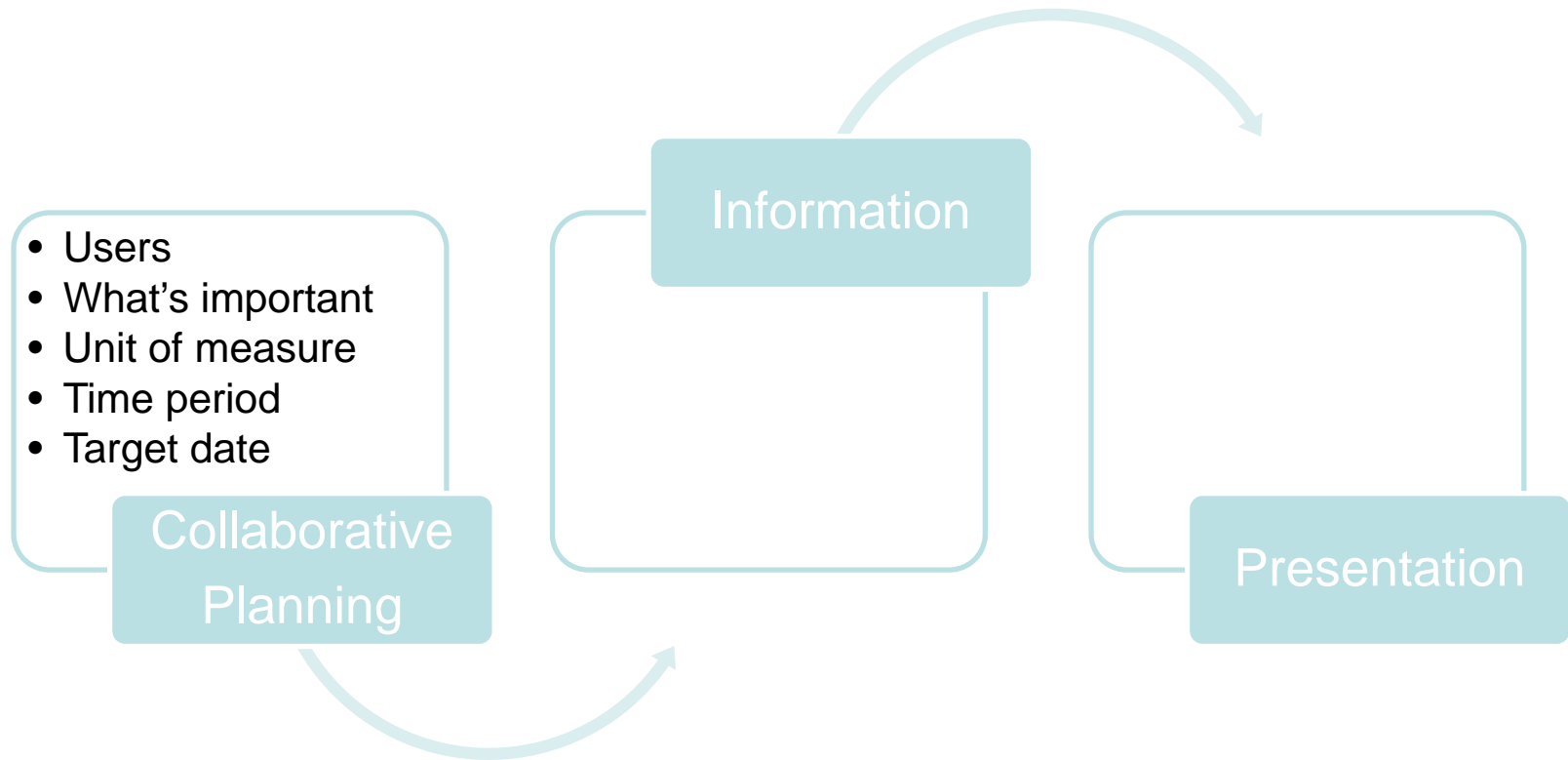
- Recurring



- Occurrence of an event



Dashboard process flow



Information phase – Source of information

- Financial

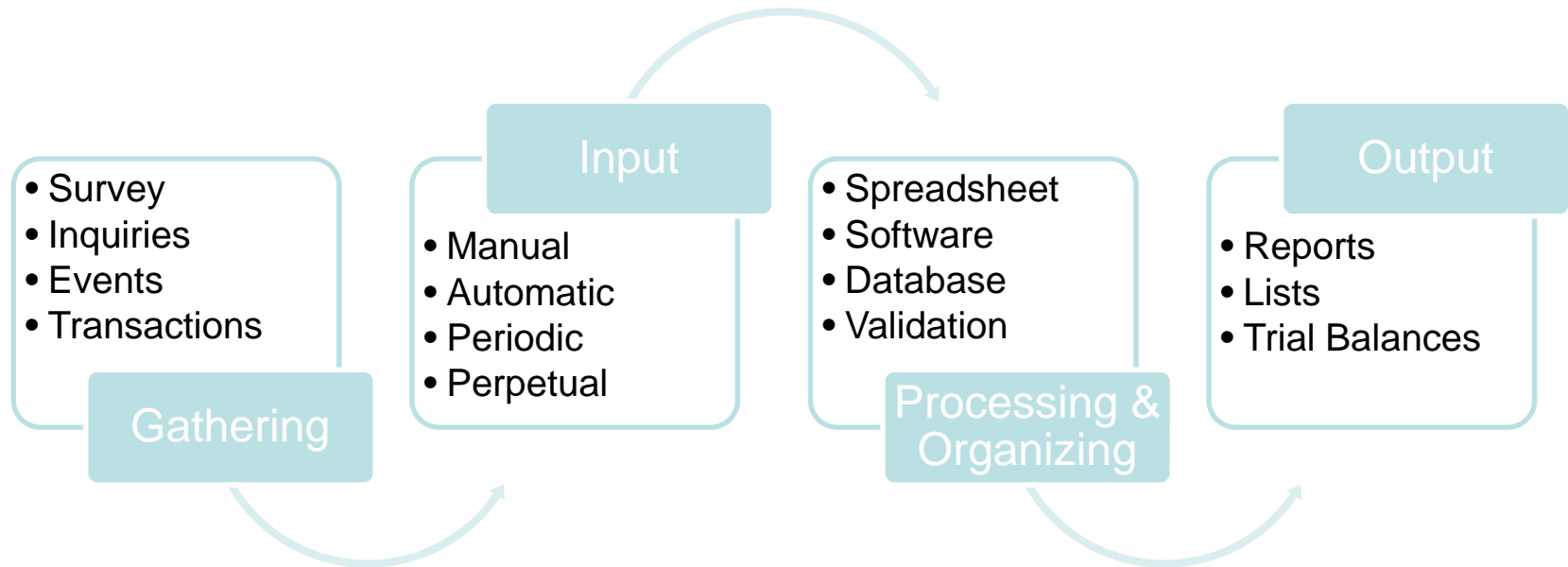


- Non-financial

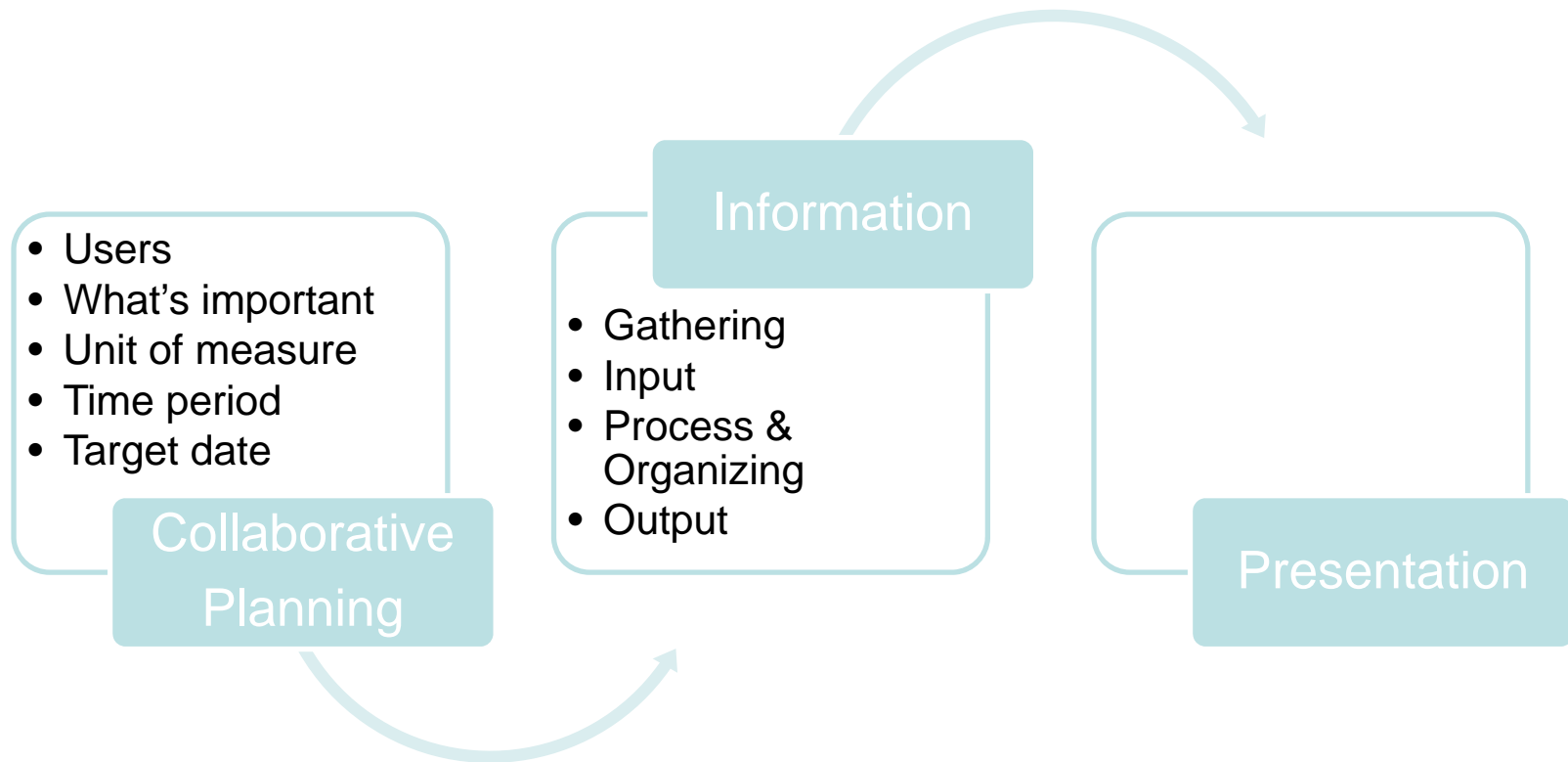
REPORT CARD				
GRADING PERIOD	1	2	3	4
READING	A	A	A	A
WRITING/COMMUNICATION	A	A	A	A
SCIENCE	B	C	C	C
MATH	B	B	B	B
ART	A	A	A	A
MUSIC	A	A	A	A
PHYSICAL EDUCATION	A	A	A	A
Class Average	B	B	B	B
Attendance	Present	Present	Present	Present
Homework	Good	Good	Good	Good
Effort	Good	Good	Good	Good
Participation	Good	Good	Good	Good



Information phase –



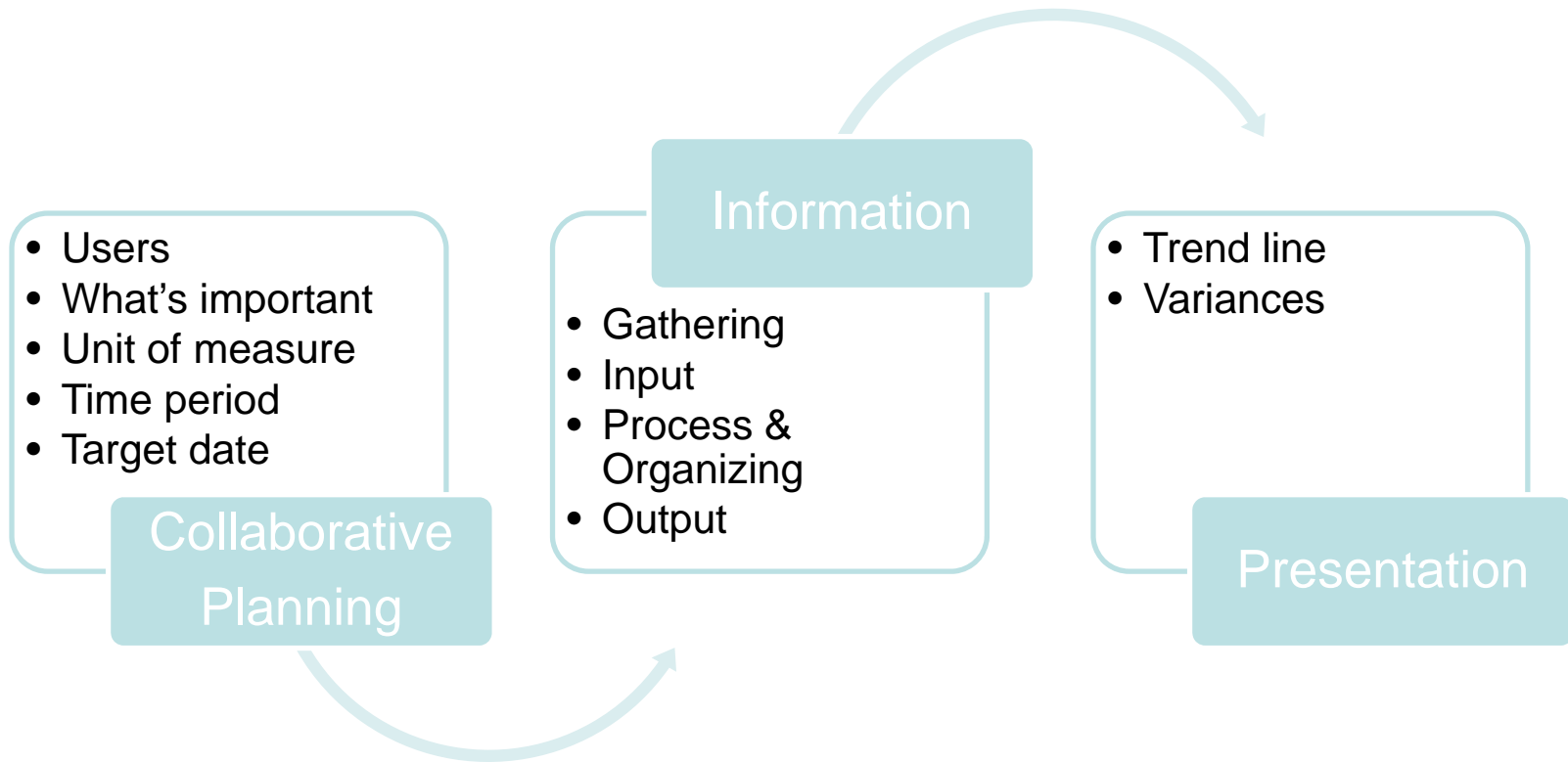
Dashboard process flow



Graphic or table presentation –
A picture is worth a thousand words!



Dashboard process flow



Graphic or table presentation – Using excel!

- Pivot table

Count of Company Row Labels	Column Labels Palo Alto	San Francisco	San Jose	Grand Total
arts		3	1	4
arts		3	1	4
association		7		7
education		3		3
environmental		1		1
humanitarian		2		2
public affairs		1		1
charity		14		14
domestic violence		1		1
humanitarian		6		6
substance abuse		2		2
urban development		3		3
veteran affairs		2		2
education	3	10		13
arts	1			1
education	2	10		12
foundation	1	18		19
education	1	5		6
environmental		2		2
health & wellness		2		2
humanitarian		3		3
religious affiliation		2		2
social justice		4		4
health		1	1	2
health & wellness		1	1	2
Grand Total	4	53	2	59

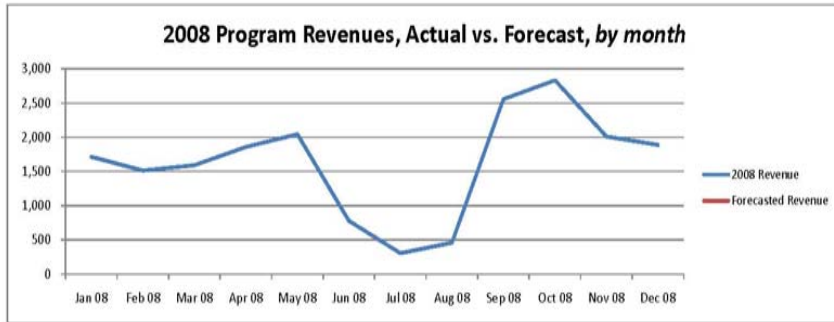
- Conditional formatting

We Care Community Foundation
A/R Aging Summary
As of December 15, 2011

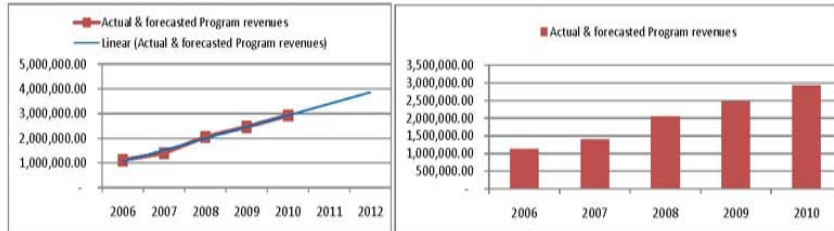
	Current	1 - 30	31 - 60	61 - 90	> 90	TOTAL
Stills, Stephen	16.24	0.00	0.00	50,000.00	0.00	50,016.24
Joel, Billy	6,990.00	0.00	6,990.00	0.00	(500.00)	13,480.00
Kent, Clark	5,000.00	(3,200.00)	0.00	0.00	0.00	1,800.00
Wayne, Bruce	0.00	0.00	65,000.00	32,000.00	(4,111.00)	92,889.00
Greenspan, Alan	146.14	2,000.00	0.00	0.00	0.00	2,146.14
Santana, Carlos	0.00	0.00	54.00	0.00	32,000.00	32,054.00
Jean, Billie	65,600.00	4,000.00	0.00	0.00	8,000.00	77,600.00
Young, Neil	10,000.00	0.00	12,500.00	0.00	0.00	22,500.00
TOTAL	87,762.38	2,800.00	84,644.00	82,000.00	35,389.00	282,485.38
<i>Expected Recovery</i>	90%	81%	65%	52%	41%	
	78,977.14	2,268.00	54,784.51	42,508.80	14,676.53	193,214.98

You have the data. Pictures tell the story...

We Care Foundation
Management Analysis
Year Ending 12/31/2008



TREND ANALYSIS - REVENUE

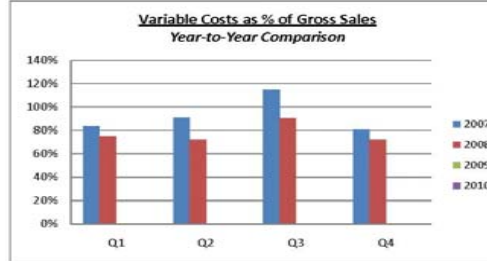


LIQUIDITY ANALYSIS

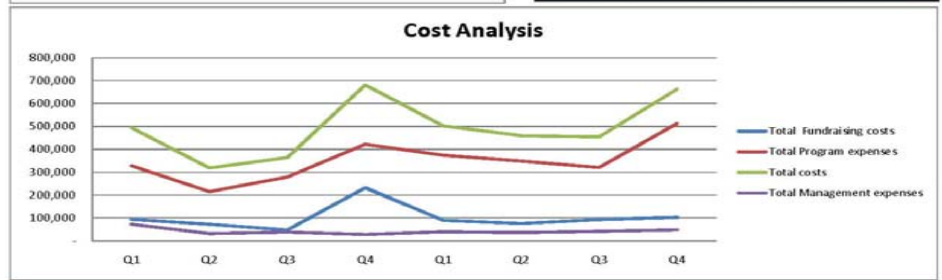
Item	Reference	Actual 2006	Actual 2007	Actual 2008	Forecast 2009	Forecast 2010	
Total Current Assets as % Net Sales	B8/F7	-0.48%	5.92%	6.18%	0.00%	0.00%	Better
Cash & Equivalents as % of Current Assets	B1/B8	864.75%	71.08%	46.13%	0.00%	0.00%	Worse
Quick Ratio (Acid test)	(B1+B2+B3)/B28	(0.34)	0.11	0.15	-	-	Better
Receivables % of Current Assets	B3/B8	-187.78%	17.25%	27.49%	0.00%	0.00%	Better
Receivable Turnover	F45/B3	109.97	72.33	31.55	-	-	Worse
Receivables as % of Total Assets	B3/B17	0.54%	0.49%	1.76%	0.00%	0.00%	Better
Current Ratio	B8/B28	(0.05)	0.13	0.16	-	-	Better
Total Debt % of Total Capital	B32/B43	-9475.74%	-325.98%	-234.05%	0.00%	0.00%	Better

We Care Foundation
Management Analysis
Year Ending 12/31/2008

OPERATIONS ANALYSIS

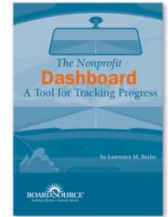


Insert comments to management here



Insert comments to management here

Must reads!



Literature on Dashboards for Nonprofits:

- Butler, Lawrence M. “*The Nonprofit Dashboard: A Tool for Tracking Progress*”

Microsoft Office Excel 2007:

- Learn to use Pivot Tables in Excel 2007 to Organize Data
http://www.timeatlas.com/5_minute_tips/chunkers/learn_to_use_pivot_tables_in_excel_2007_to_organize_data
- Working with Conditional Formatting
- <http://www.uwec.edu/Help/Excel07/frmt-cond.htm>

Microsoft Office Excel 2003:

- Excel 2003 Pivot Table Tutorial
- <http://www.edferrero.com/ExcelTutorials/PivotTableTutorial2003/tabid/89/Default.aspx>
- Conditional Formatting
- <http://www.mvps.org/dmccritchie/excel/condfmt.htm>

Also, don't hesitate to visit the help section within Excel itself! It includes helpful tips for creating and managing pivot tables and thorough explanations for each of Excel's many standard functions.

Online Resources

- [Checking the Dashboard](#)
by Debra E. Blum, The Chronicle of Philanthropy
<http://philanthropy.com/article/Checking-the-Dashboard/55456/>
- [Board Café – Dashboard for Nonprofits](#)
by Jan Masaoka
<http://www.compasspoint.org/boardcafe/details.php?id=5>
- [A Nonprofit Dashboard and Signal Light for Boards](#)
by Jeanne Bell and Jan Masaoka
<http://www.blueavocado.org/sites/default/files/Nonprofit%20Dashboard%20article%20from%20Blue%20Avocado.pdf>

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