



Dashboard Driving

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CALCASA
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Quick Survey

- What % of board members understand your 2010 organizational goals?

- A. Less than 50%
- B. 51 to 75%
- C. More than 75%
- D. I have no idea





Quick Survey

- Does your board and staff have a shared vision for measuring success?

- A. Yes
- B. No





Quick Survey

- What % of your staff can read and understand the financial package?
 - A. Less than 50%
 - B. 51 to 75%
 - C. More than 75%
 - D. I don't know





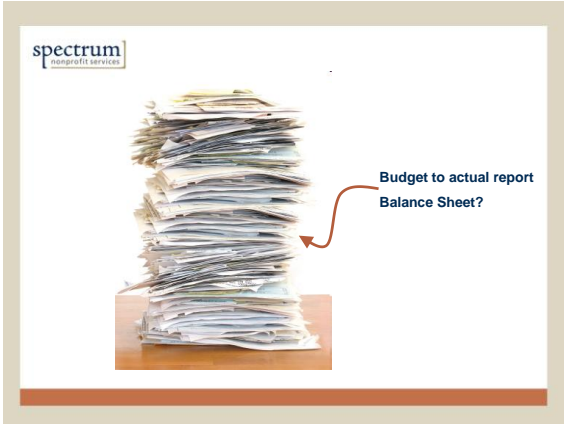
Information Overload





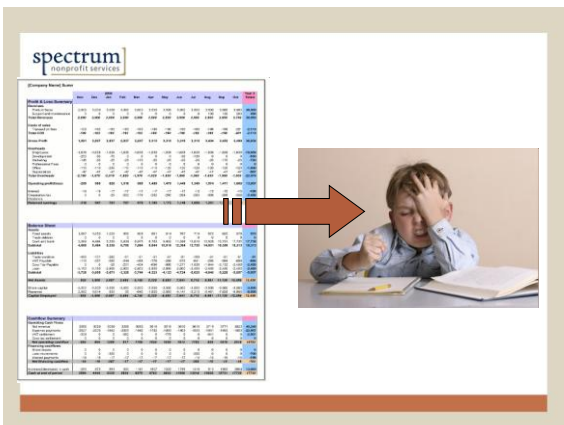
The Board Package





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Account	Budget	Actual	Variance
Administrative	100,000	105,000	5,000
Program	200,000	195,000	5,000
Capital	50,000	50,000	0
Other	10,000	10,000	0
Total	360,000	360,000	0



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As a Dashboard

Indicator	Target	6 months ago	3 months ago	This Month
Days of cash on hand	60	25	48	57
Net surplus or deficit YTD compared with YTD budget.	0.0	\$10,450 better	\$2,500 worse	\$5,400 better
Individual Contributions	100,000	50,250	75,000	98,290
Total expenses	On budget	\$2,500 worse	\$760 worse	On budget
Days from end of month to financial statement completion	45 days	65	52	40

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- ### Today's Agenda
- The purpose of a dashboard
 - Styles of dashboards
 - The process for developing a dashboard
 - What do you include?
 - Implementing!
 - Getting Started



- Agreement **AHEAD OF TIME** on what matters
- Agreement **AHEAD OF TIME** on targets
- Agreement **AHEAD OF TIME** on when action is needed



- Agreement **AHEAD OF TIME** on what matters
- Agreement **AHEAD OF TIME** on targets
- Agreement **AHEAD OF TIME** on when action is needed
- Ability to monitor and update strategic plan

- Ease of use to read and understand
- Engaging and empowering for both board **AND** staff across roles and departments
- Fights incremental creep of reports and enforces some discipline



Styles of Dashboards

- Most are 1 page
- Charts, graphs, icons, colors . . .







Format Considerations

- Keep it simple and easy to read.





What is on a dashboard?



- Fiduciary and governance responsibilities.
- Just because something is NOT on the dashboard, doesn't mean it isn't important.



Dashboard Dials



1. Finance
2. Program objectives and impact
3. Human resources
4. Compliance & risk management
5. Board of Directors and governance
6. Fundraising



Starting Points

- Key Questions:
 - What is the organization focused on this year?
 - What are the key drivers that will bring success?





Starting Points

- How does your organization generate resources?
- Do we have a strategic plan?
- What does our community need us to focus on this year?
- What is our budget focused on?



Where do you get this information?

- Organization's strategic plan or business plan.
- Brainstorm of organization's purpose.
- Organization's mission –
 - Who do you want to serve?
 - What does success look like?
 - What is needed to achieve it?

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FINANCE INDICATORS

Indicator	Target	6 months ago	3 months ago	This Month
Days of cash on hand	60	25	48	57
Net surplus or deficit YTD compared with YTD budget.	0.0	\$10,450 better	\$2,500 worse	\$5,400 better
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Program

- Monitor deliverables
- Connect deliverables and dollars
- Suggest / demonstrate outcomes
- Keep mission in front of management and board

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PROGRAM INDICATORS

Indicator	Target	6 months ago	3 months ago	This Month
Enrollment in training classes	85% of capacity	85%	91%	83%
Average participant satisfaction rating. Scale of 1-5 with 5 being "very satisfied"	4.0	4.2	3.8	4
GED certificates obtained	90%	70%	85%	89%
Presentations to companies, churches, neighborhood groups	5 per month	4	6	6



People

- Connects people processes to performance
- Reminds board to value staff retention, professional development, etc.
- Assures non-management of organizational commitment to people



HUMAN RESOURCES INDICATORS

Indicator	Target	6 months ago	3 months ago	This Month
Staff Turnover	Less than 10%	0%	15%	0%
Staff Evaluations Completed	90% within 6 months	70%	80%	85%
Compensation Study Completed	By budget time	Not Started	In progress	Done
Diversity	70% people of color on staff	75%	60%	70%



Compliance & Risk Management

- Answers the questions the board is required to ask
- Makes critical but less visible work known to staff

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COMPLIANCE INDICATORS

Indicator	Target	6 months ago	3 months ago	This Month
Form 990 Filed	On time	N/A	Yes	Yes
Evidence of insurance payments distributed to board	By May 31st	Yes	Yes	Yes
Business Continuity Plan Done	By June	Started	In progress	Done

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- ## Governance
- Makes board performance monitoring more ongoing and less personal
 - Connects board performance to organizational performance
 - Reminds staff of board role

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GOVERNANCE INDICATORS

Indicator	Target	6 months ago	3 months ago	This Month
Percentage of last six meetings with quorum	100%	90%	95%	98%
Evaluation of ED Completed	By May 31	Started	Done	Done
Increase board size	Add 2 new members	1 identified	0 added	1 identified



- Typically a board and staff task force
- Figure out what is important?
 - Feedback from board members or staff about what they want to know.
 - Tie into plans.
- Define targets.
- Decide who will manage and update.



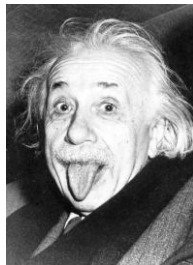
- When should we do it?
- Do we distribute just the dashboard or other documents as well?
- How often is it updated?





Sign in Einstein's Office

"Not everything that counts can be counted, and not everything that can be counted counts."





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