What’s on your dashboard?

Guy McCrary
Nonprofit Management Center
Brownbag Program
March 20, 2006
“Measuring nonprofit progress and performance is becoming increasingly important to earning the public’s trust and sustained funding from fatigued donors...”

Dr. Michael Patton
2005 National Philanthropy Day
Dashboard of a car

Key indicators?

- Speedometer – safety; time in route
- Fuel gauge – how many miles we can go before engine shuts down
- Odometer – how far we have gone; age of vehicle
- Tachometer – operating speed of engine, RPMs… how hard it’s working
- Engine temperature gauge - too hot indicates problem
- Fluid level lights – oil, coolant, windshield washer fluid
- Tire pressure - Cadillac
Dashboard of a car

Key indicators...
all in one place – right there in front of us (hoping that we don’t ignore them)

Not the whole story...
not intended to keep us from opening the hood for a closer look and to perform maintenance - replace aging fluids or install new belts – or make repairs
Other “dashboards”

- Instrument panel on aircraft
- Radar screen on submarine
- TV – business, weather, sports
- Newspaper graphs
  - Wall Street Journal
  - USA Today
- Internet home page – news page
- Rain gauge
- Utility bill
- Vital signs on patient chart in hospital
Dashboard – def.

- Key indicators
- Key data points
- Organization “drivers”
- Information we need to know and work with frequently
- Information we use to identify trends and issues…and to make decisions
**Dashboard – def.**

Set of organization-specific data, ideally presented in an easy-to-understand form, that:

1. indicates activities and/or progress compared with prior periods or planned outcomes (goals),
2. measures impact of service,
3. demonstrates adherence to mission and capacity to sustain operations.
Dashboard uses

- Compare key data over time to better understand trends, improve programs and plan future enterprises.
- Compare outcomes with inputs.
- Focus board attention on key information – and “on the same page”.
- Reduce information overload of boards.
- Brief funders on organization impact.
- Answer recurring questions from stakeholders.
- Call attention to areas of concern and provoke preventive or proactive intervention.
Examples

Program indicators:

- Clients/patients/customers/attendance
- Applications for service / number served
- Product delivered – meals on wheels, food bank
- Gifts received – toys, clothing, books
- Daily census – day care, after school programs
- Occupancy – residents
- Members – dues collections
- Volunteer hours
Examples

Financial indicators:

- Grants and contributions
- Service fees
- Total revenues
- Program expenses
- Total expenses
- Cash balance
- Current ratio
Examples

Marketing indicators:
- Responses to surveys, solicitations.
- Attendance at open houses, fundraisers, “meet” events.
- Volunteers recruited.
- Website hits.
Some samples...
Total Assets

- 1995: $4.9 million
- 1996: $6.9 million
- 1997: $8.7 million
- 1998: $9.0 million
- 1999: $11.0 million
- 2000: $11.9 million
- 2001: $12.7 million
- 2002: $13.5 million
- 2003: $25.6 million
- 2004: $34.4 million
- 2005: $37.4 million
Note: Performance of individual component funds will vary as a function of their respective activity.
Goal check

Achieving this goal will mean raising an ambitious \$875,000 per year during each of the next four years.*

Incremental amount does not assume changes in market value through investments or adjustments for annual distributions.
Sources of Funds
2003

- Government contracts: 56%
- Grants: 36%
- Client payments: 8%
- Contributions: 0%
- Interest: 0%

Total adjusted budget: $275,658
Uses of Funds
2003

- total adjusted budget $242,599
Cash Flow

- **Projected Revenues**
- **Projected Expenses**

**Graph Details:**
- **Y-axis:** Dollars in thousands
- **X-axis:** Months (J F M A M J)
- Green line represents **Projected Revenues**
- Red line represents **Projected Expenses**

The graph shows the trend of projected revenues and expenses over the months, with revenues generally decreasing and expenses relatively stable.
Cash at end of month

2004 2005

Jan  $98,241  $91,506
Feb  $92,675  $100,407
Mar  $92,596  $98,454
Apr  $76,827  $108,246
May  $73,066  $100,000
Jun  $83,626  $120,000
Jul  $78,223  $140,000
Aug  $87,723  $110,706
Sep  $78,500  $113,404
Oct  $67,899  $113,595
Nov  $0  $111,708
Dec  $20,000  $110,285

$40,000  $100,000  $140,000

$20,000  $80,000  $120,000

$0  $60,000  $160,000

$0  $80,000  $180,000
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<th>Program Data</th>
<th>Q1</th>
<th>Q2</th>
<th>Q3</th>
<th>Q4</th>
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<td><strong>Patient visits</strong></td>
<td></td>
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<td>2005</td>
<td>942</td>
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<td><strong>Avg Pts/ Day</strong></td>
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<td>15</td>
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Board Meeting Attendance

![Bar Chart showing monthly attendance from January 2004 to March 2006.]
Total Board Gifts = $2,450

71%

29%

Members who have made 2005 gift to organization.
Total Board Gifts YTD = $240

2005: 7 gifts
2004: 11 gifts
(as of February 28, 2006)
What’s on your dashboard?

Participation time…
What are indicators of your organization that should be monitored more regularly by your board?

What areas of concern would command more board attention if presented regularly on a dashboard?

Would a dashboard be useful tool for your organization?
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