

What's on your dashboard?

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Brownbag Program

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“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**

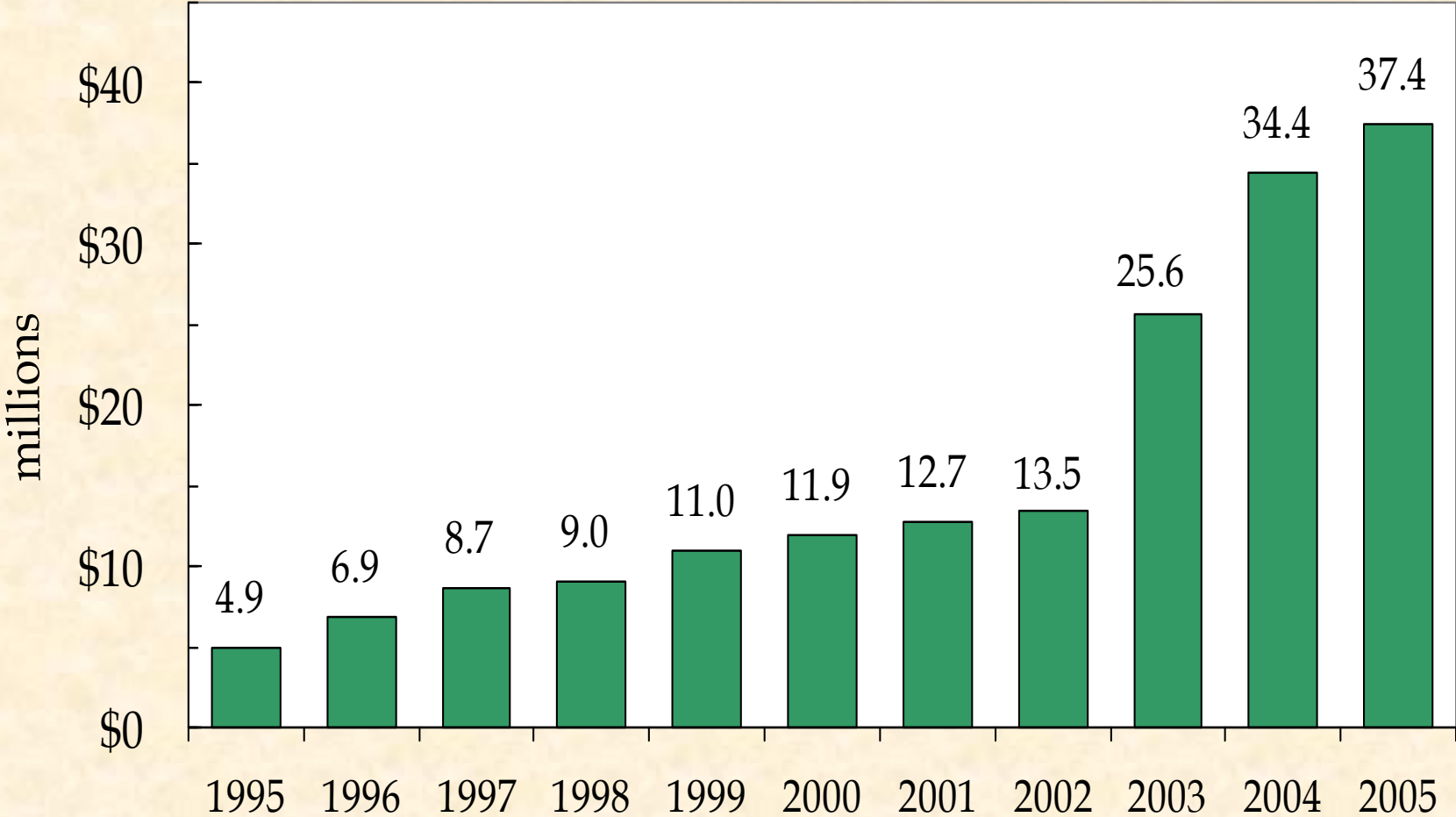
Examples

Marketing indicators:

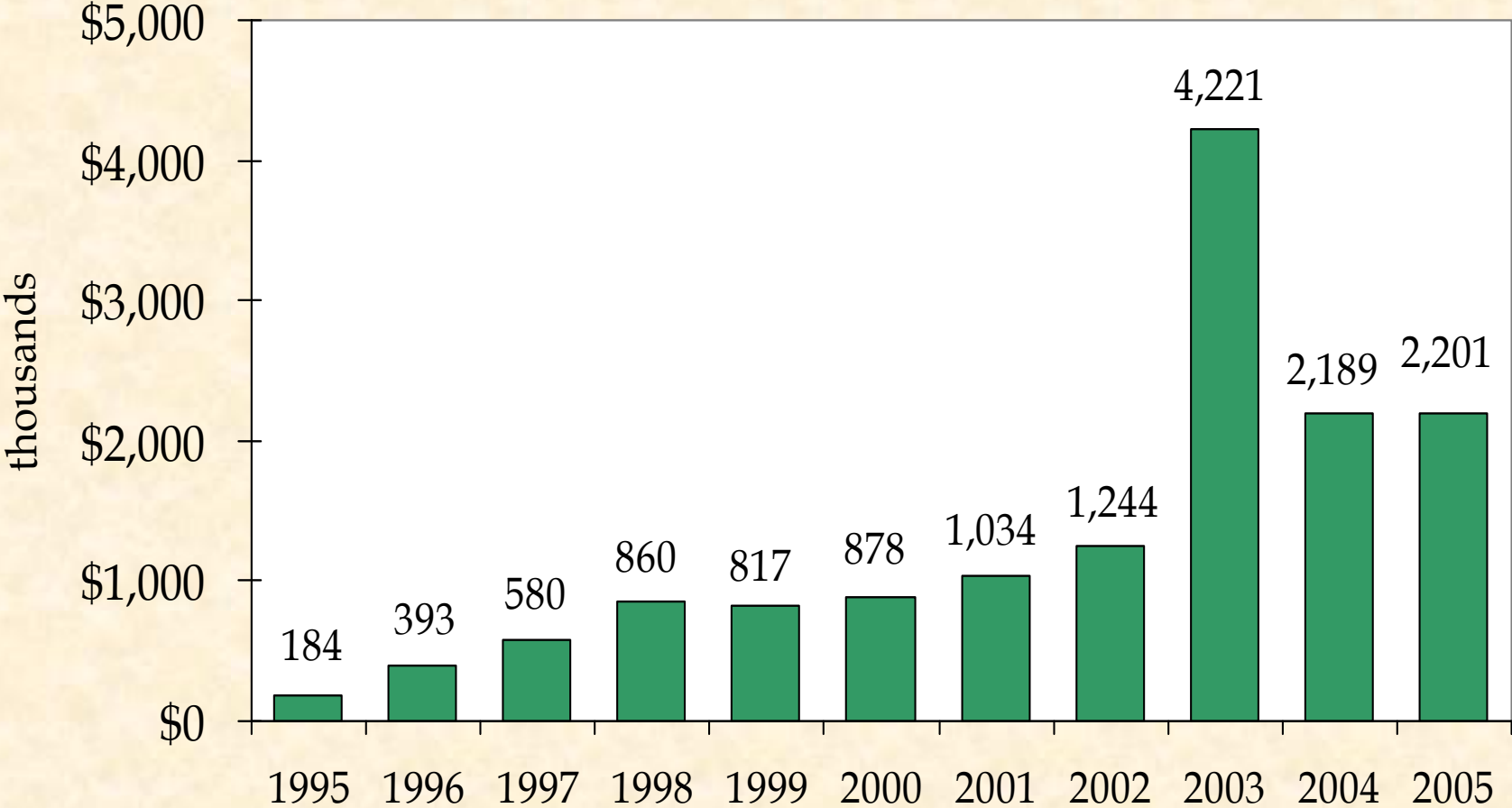
- **Responses to surveys, solicitations.**
- **Attendance at open houses, fundraisers, “meet” events.**
- **Volunteers recruited.**
- **Website hits.**

Some samples...

Total Assets

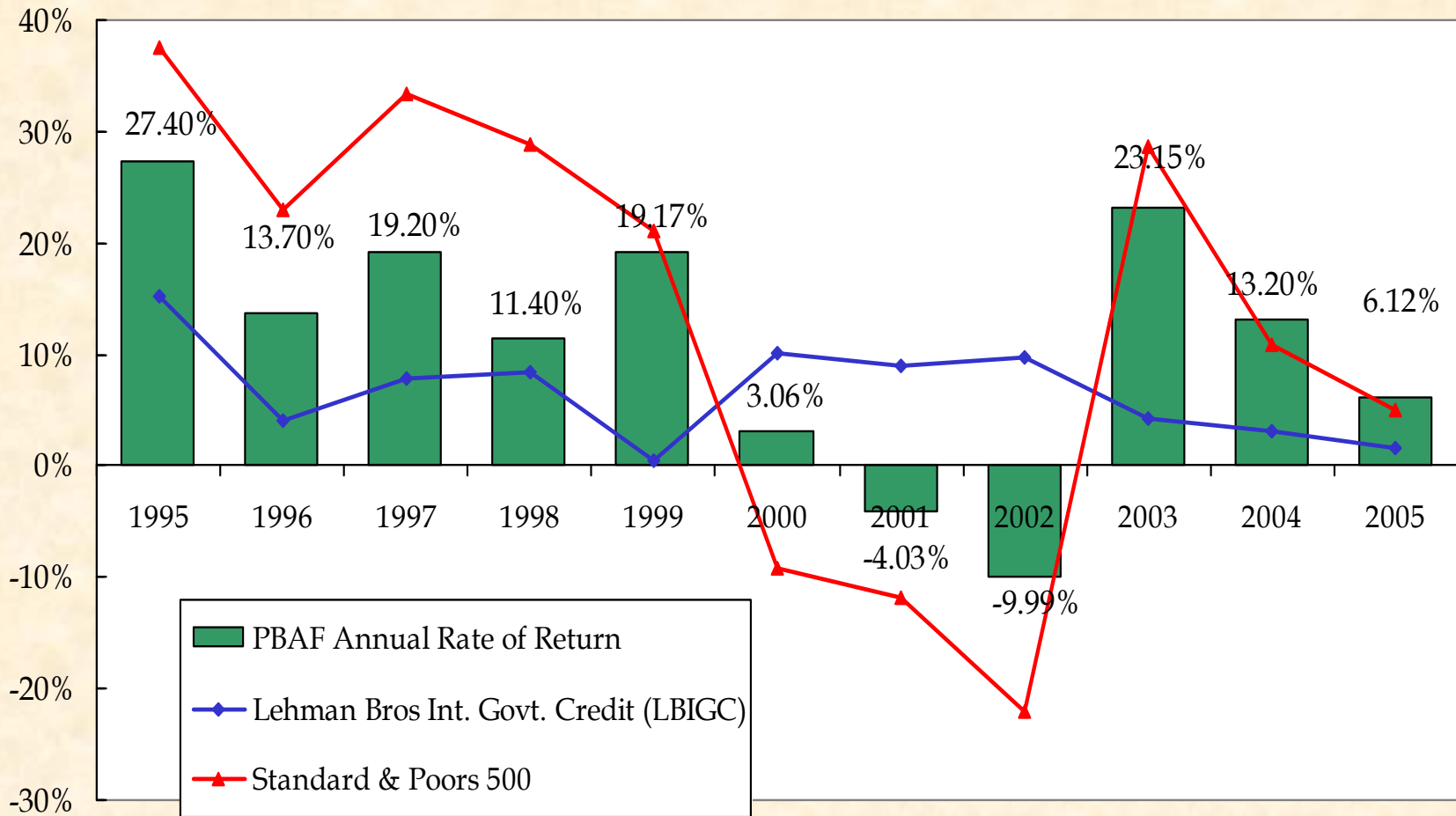


Total Grants and Distributions



Investment Pool Performance

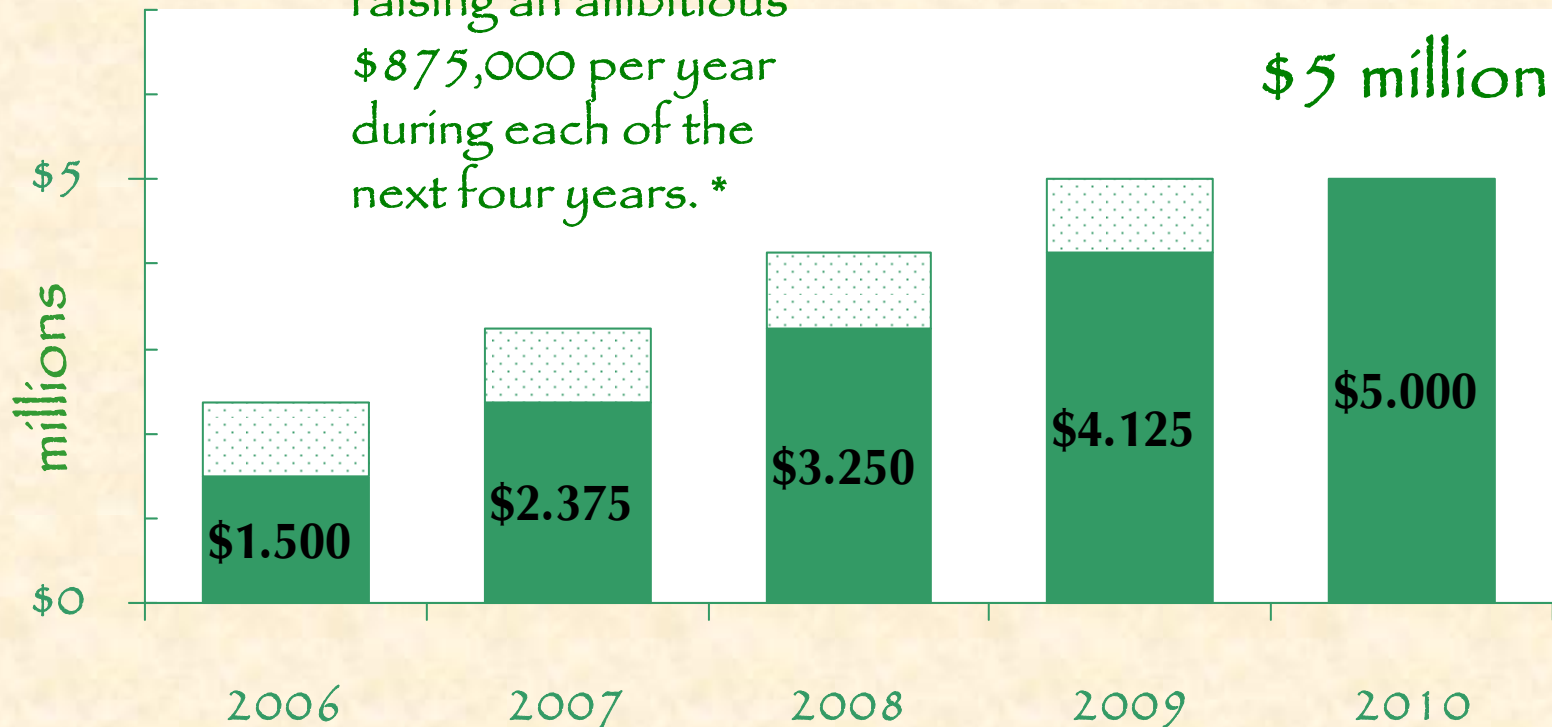
Net of Investment Fees



Note: Performance of individual component funds will vary as a function of their respective activity.

Goal check

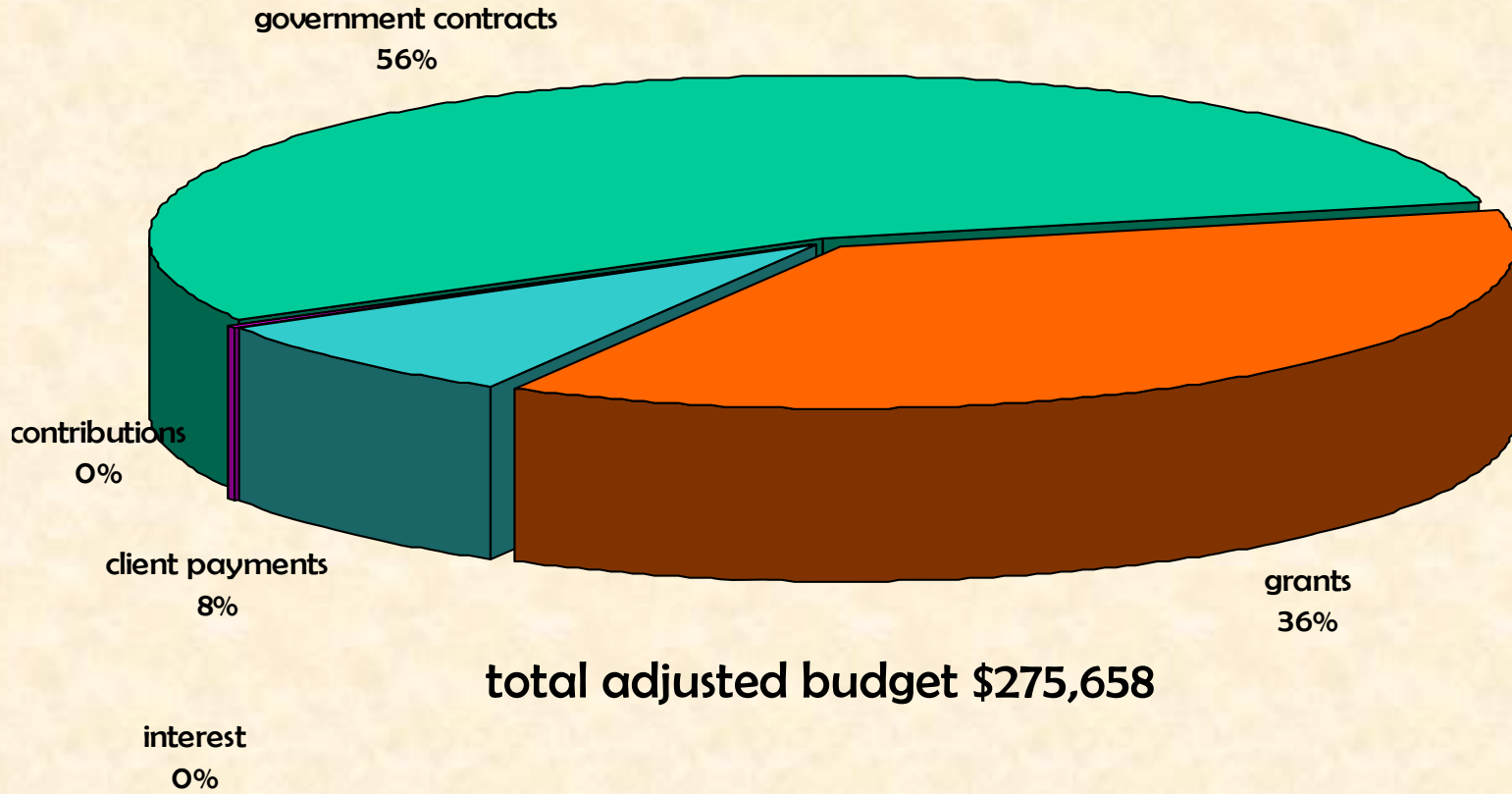
Achieving this goal will mean raising an ambitious \$875,000 per year during each of the next four years. *



* Incremental amount does not assume changes in market value through investments or adjustments for annual distributions.

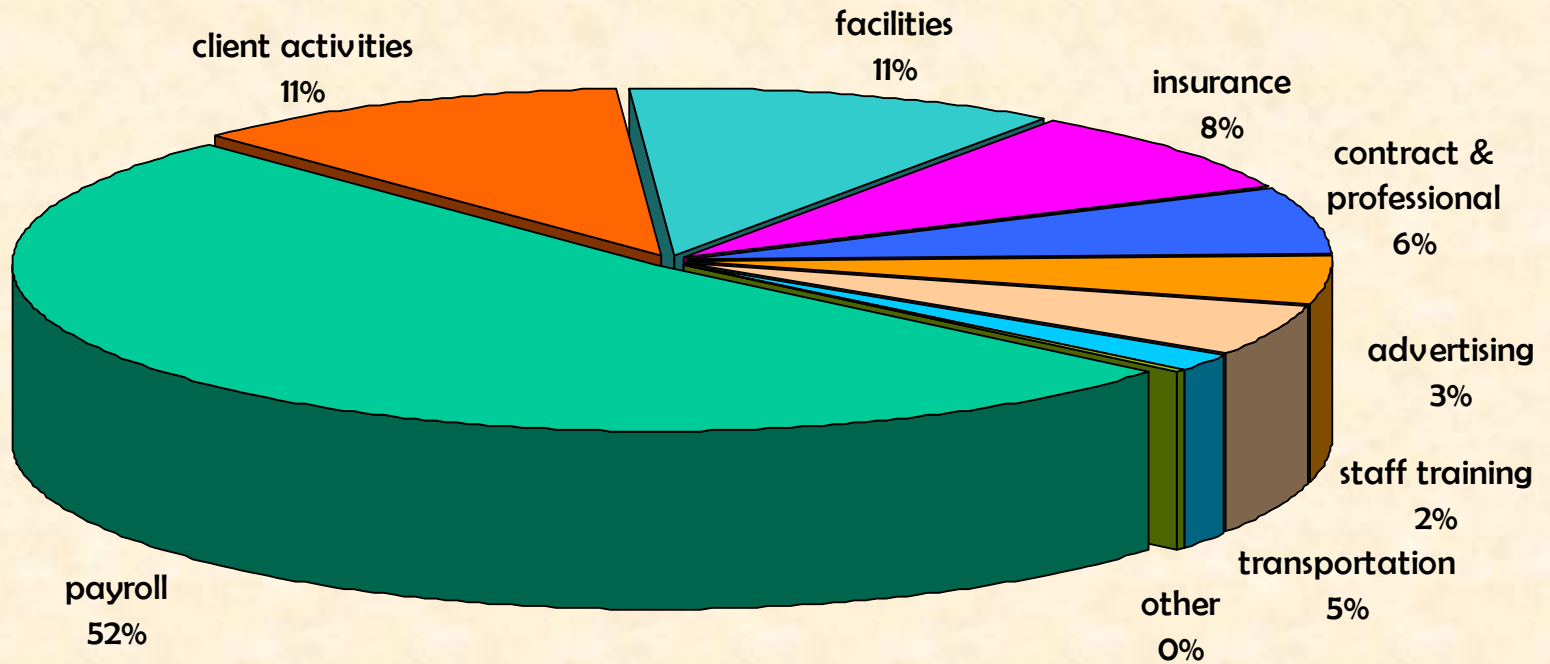
Sources of Funds

2003



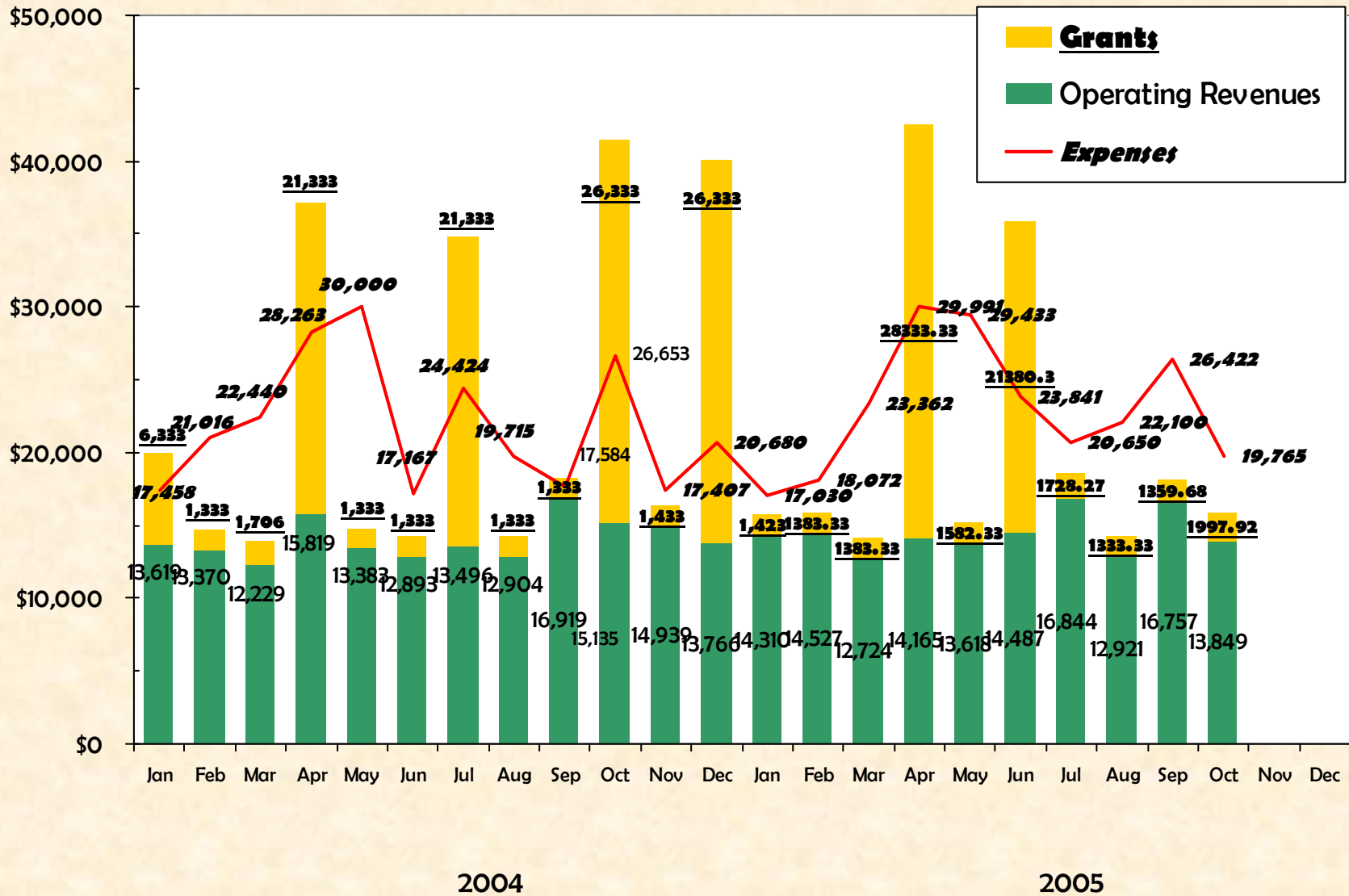
Uses of Funds

2003

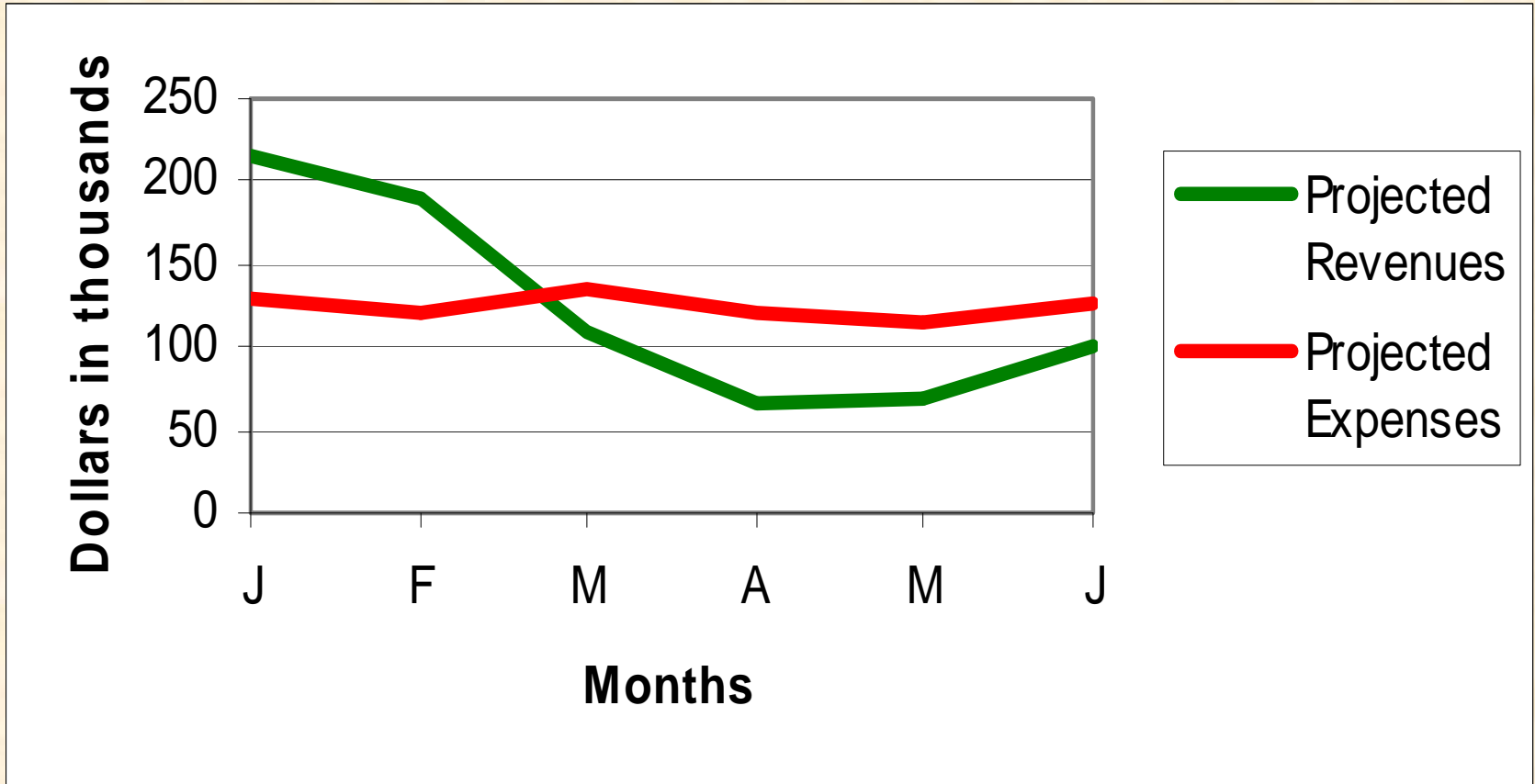


total adjusted budget \$242,599

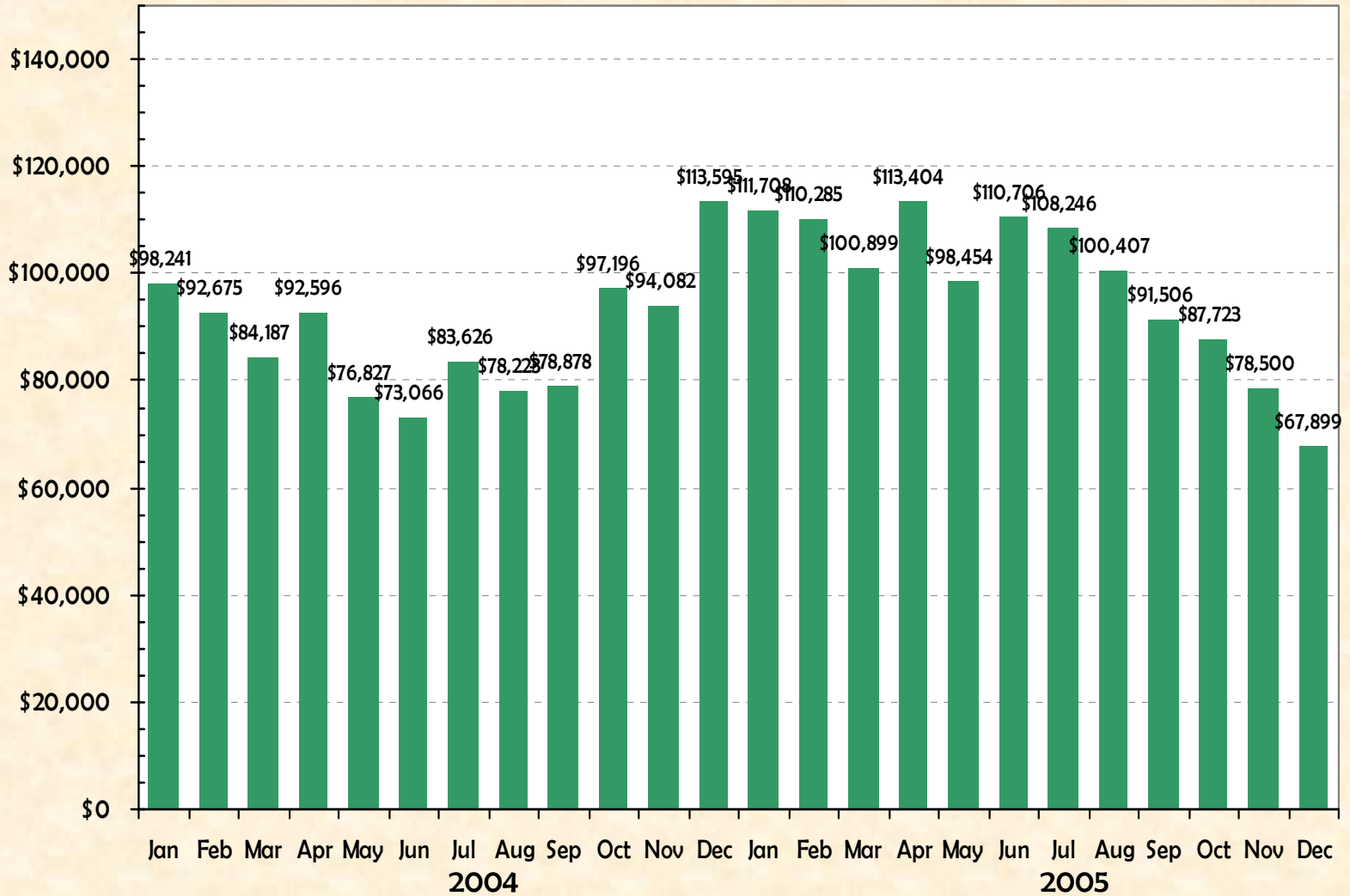
Revenues & Expenses



Cash Flow

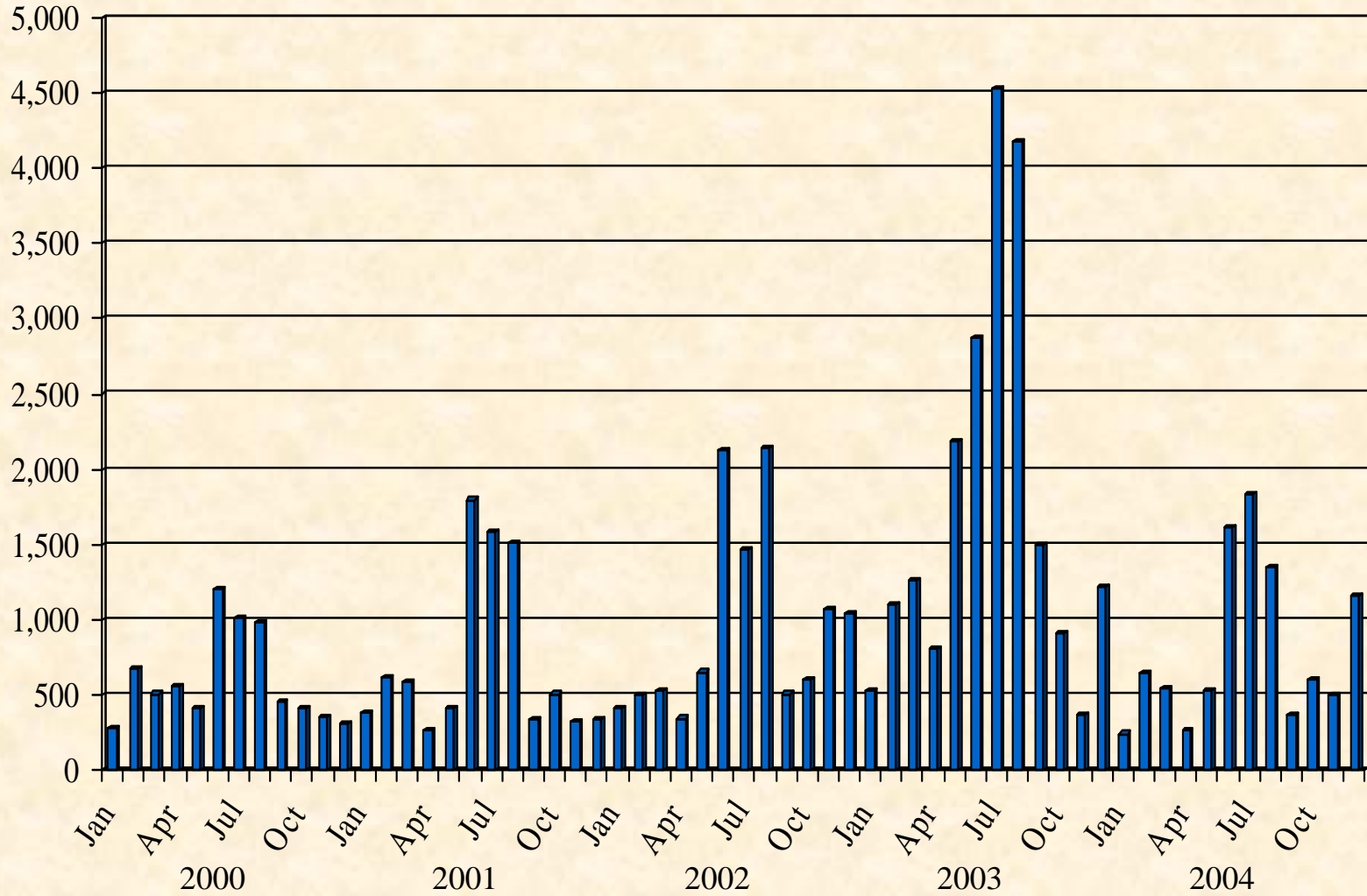


Cash at end of month

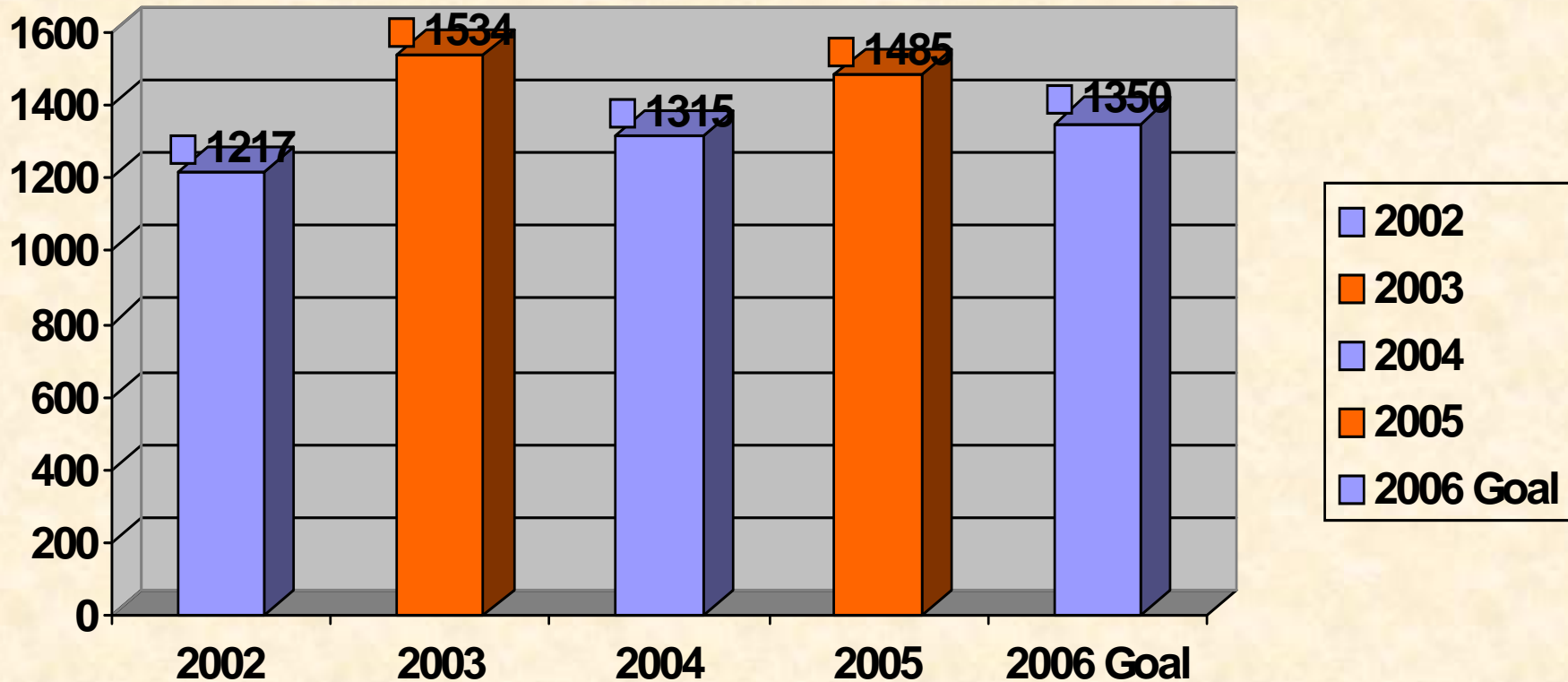


Program Data		Q1	Q2	Q3	Q4		YTD
Patient visits	2005	942	606	496	581		2,625
	2004	1,087	612	641	744		3,084
	2003	1,050	547	607	877		3,081
	2002	1,143	629	715	938		3,425
	2001	1,127	721	676	825		3,349
Avg Pts/Day	2005	15	12	10	11		12
	2004	18	12	13	15		15
	2003	16	11	12	16		14
	2002	18	12	14	17		15
	2001	18	14	13	15		15

Museum Visitors

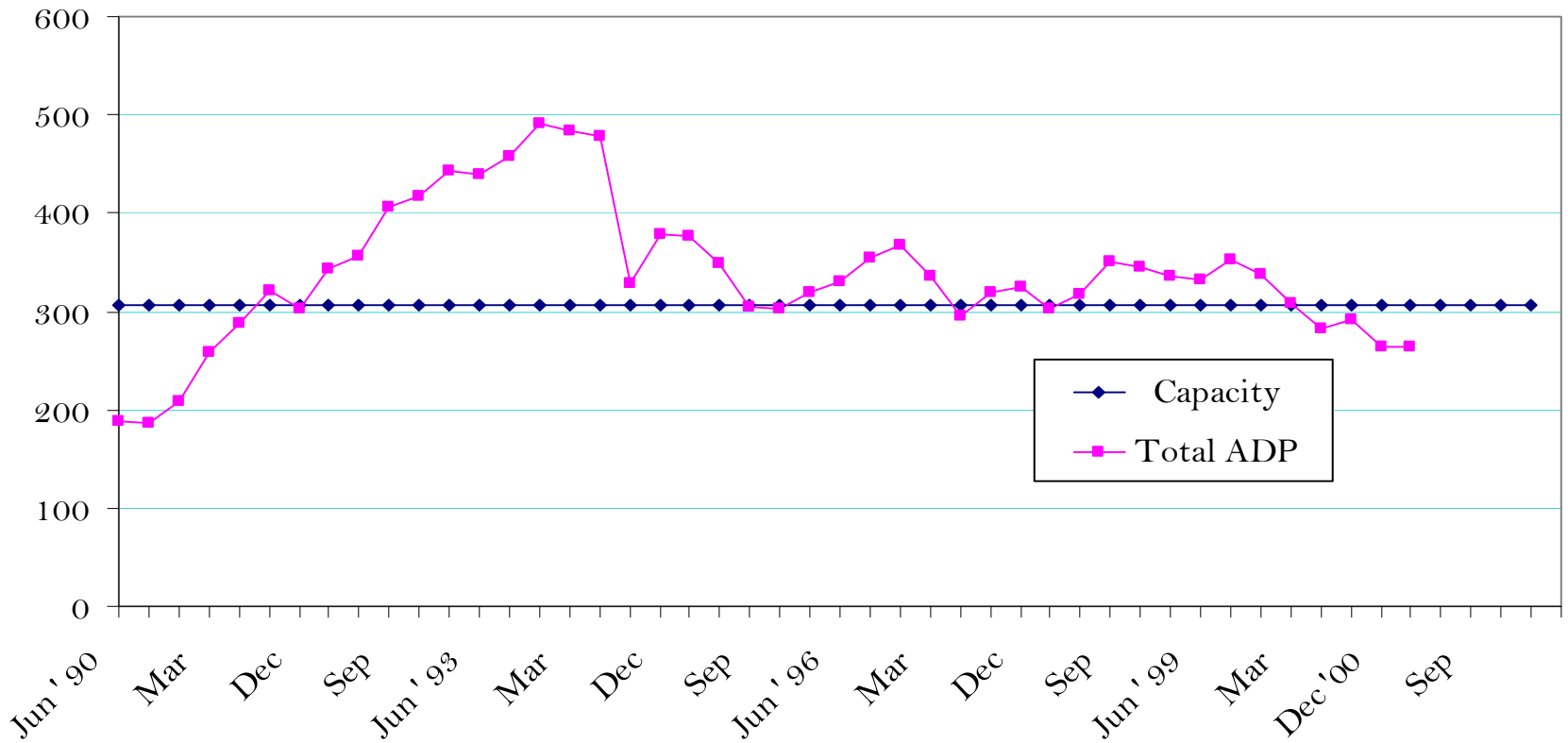


Membership

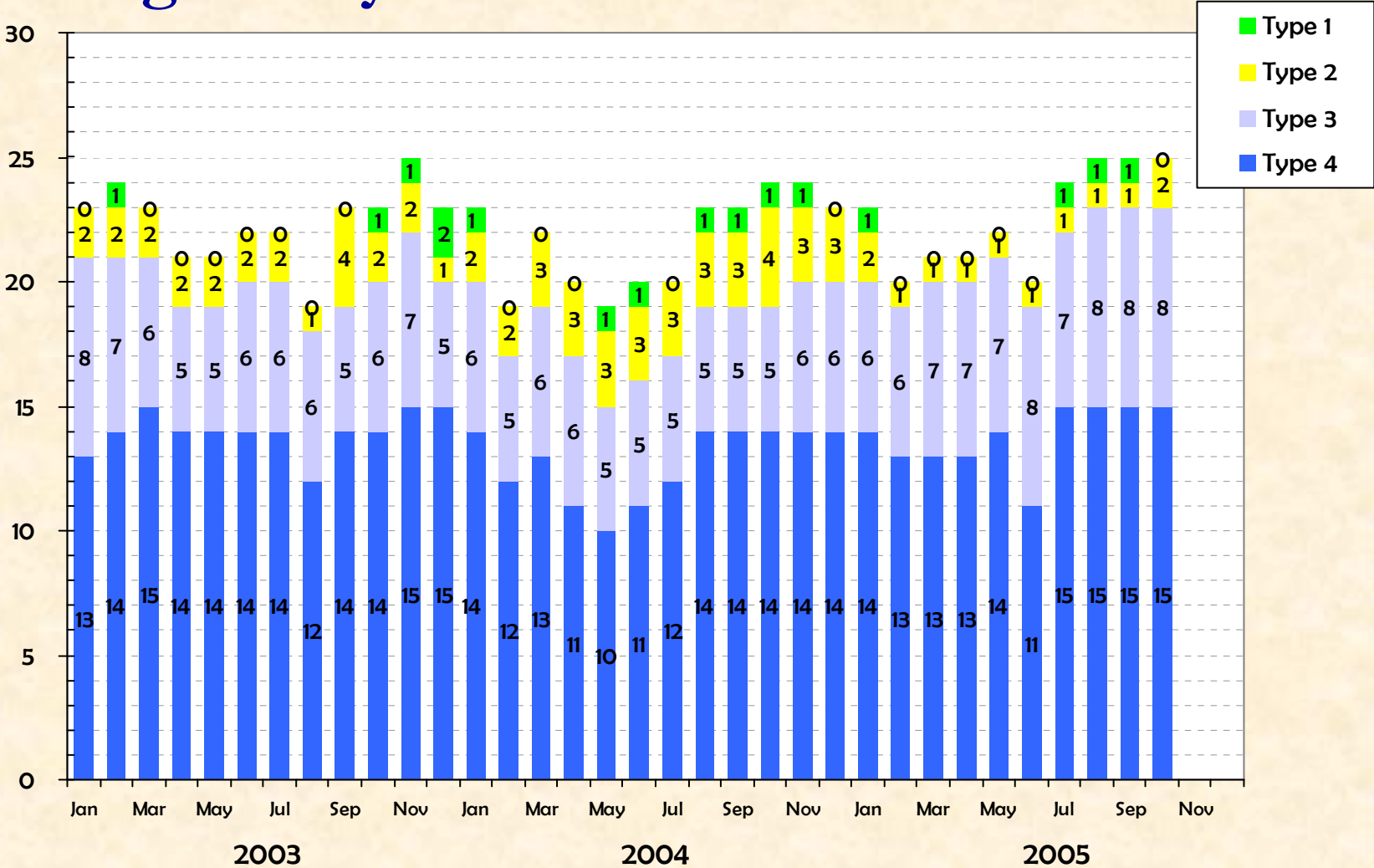


Inmate Population

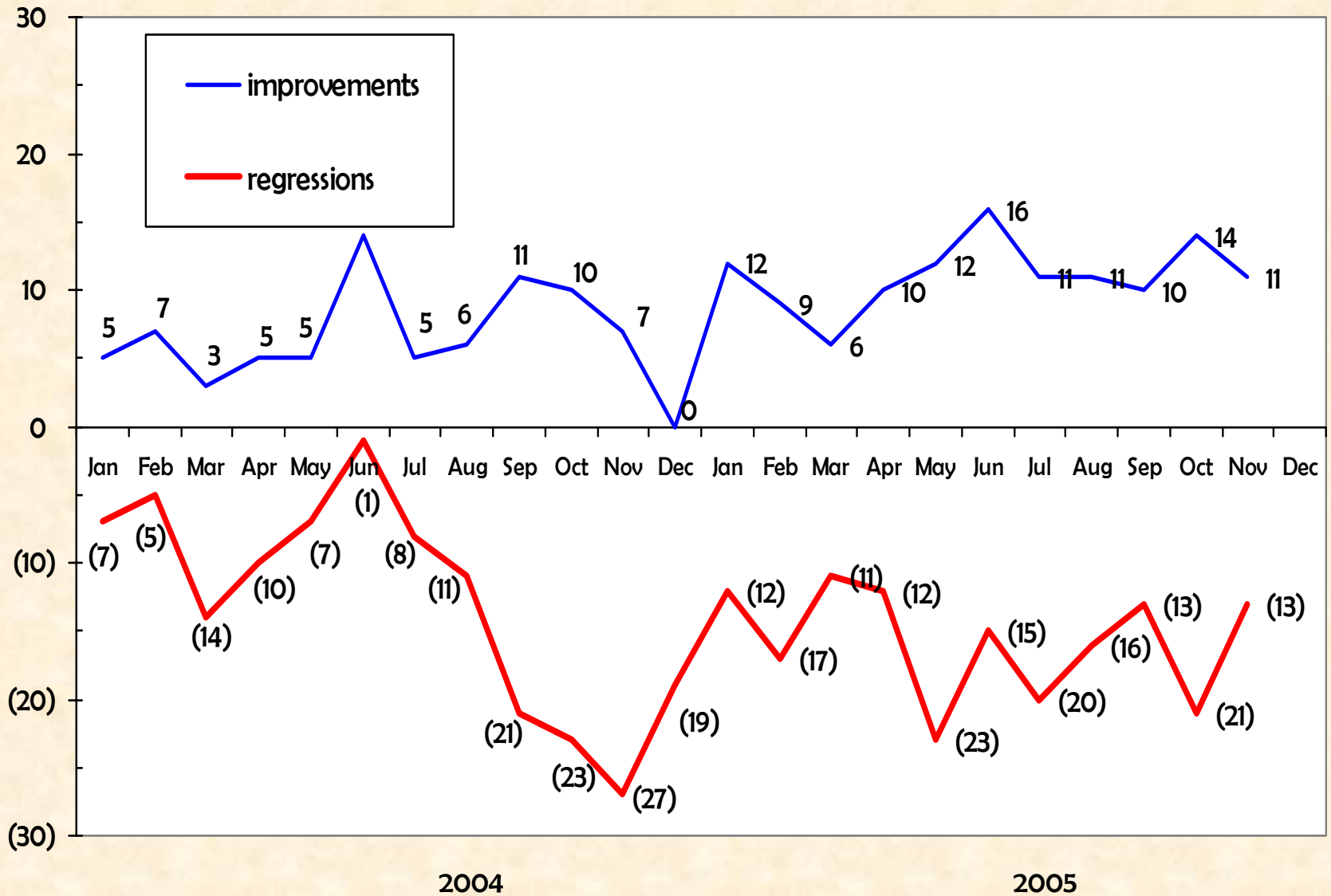
Average Daily Population of Midland County Jails



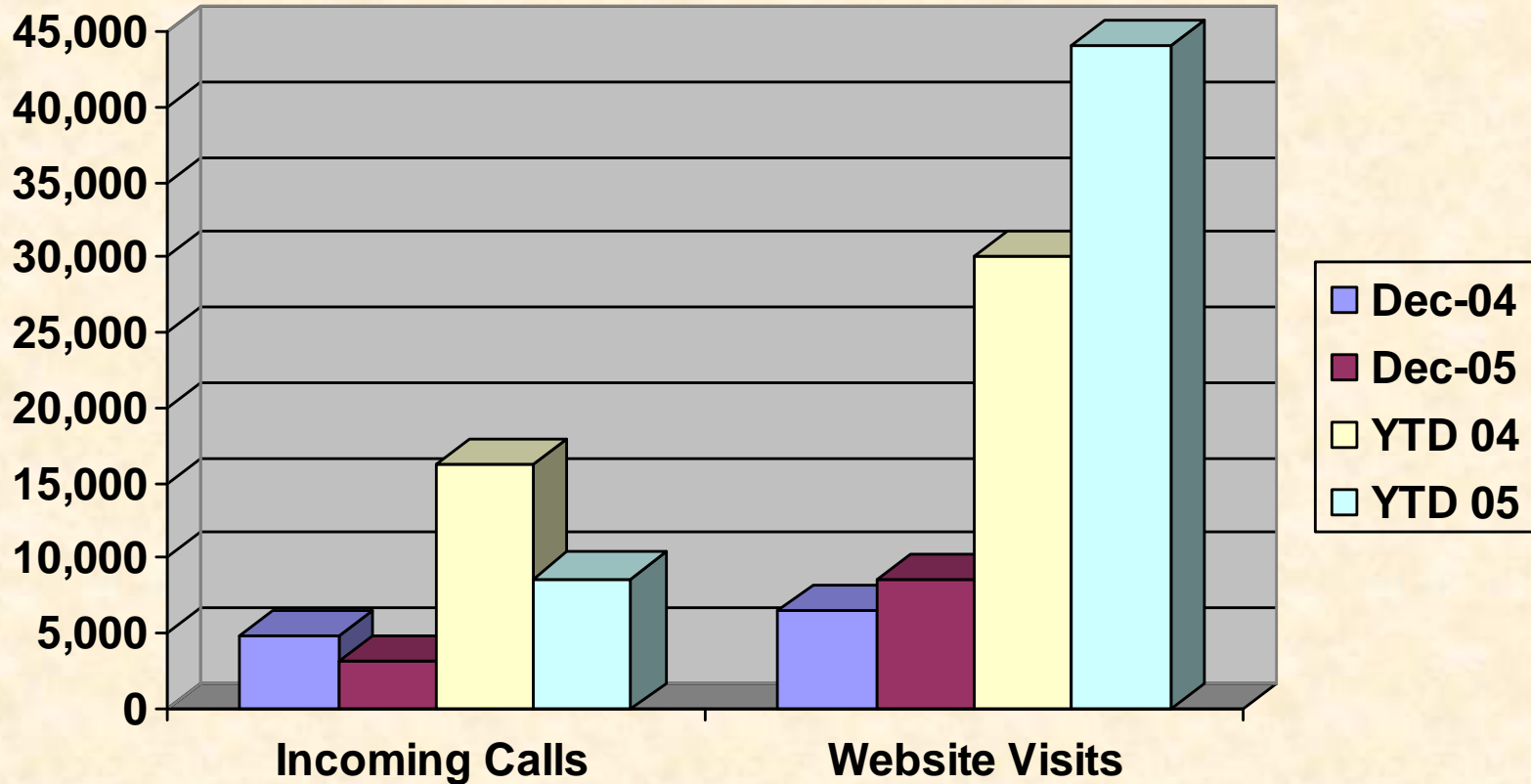
Average Daily Census



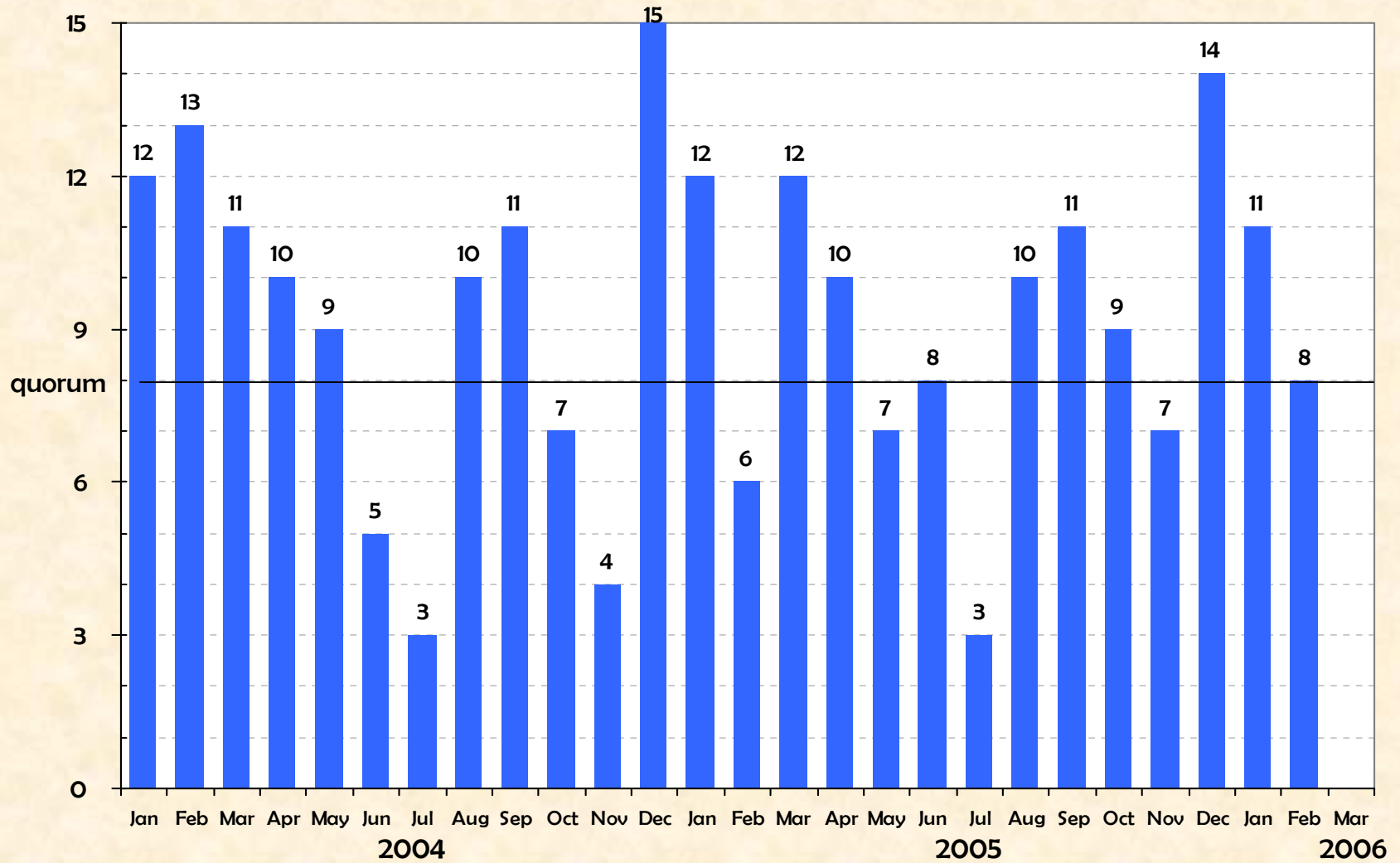
Client Indicators



Communications

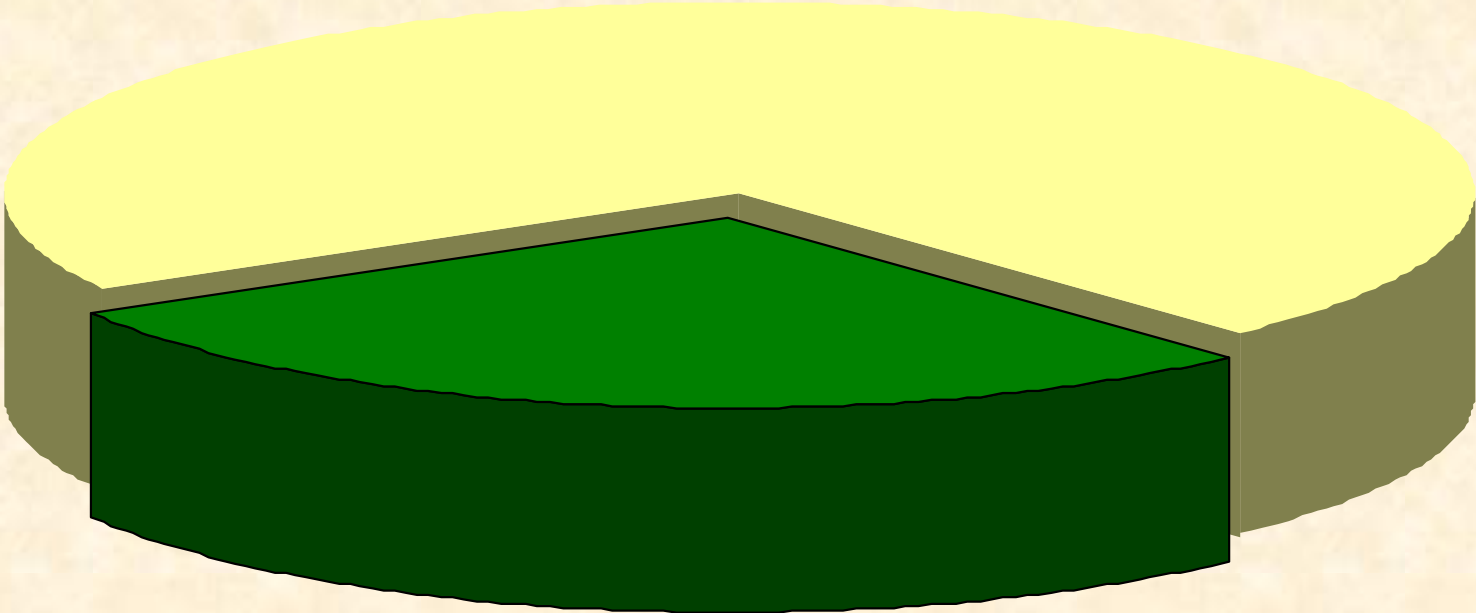


Board Meeting Attendance



Total Board Gifts = \$2,450

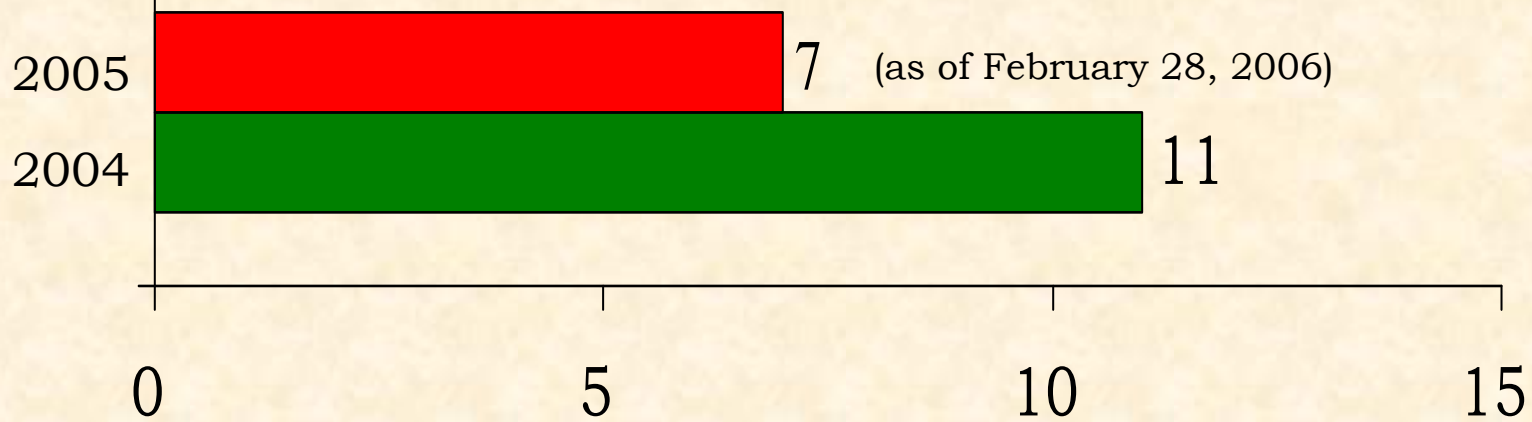
71%



29%

Members who have made 2005 gift to organization.

Total Board Gifts YTD = \$240



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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