

How to Build a Dashboard for your Nonprofit: A Critical Strategic Tool Reveals Itself

A conversation with:

Hilda Polanco, FMA

Christa Gannon, Fresh Lifelines for Youth

Jenny Ocon, UpValley Family Centers

Follow the conversation on social
media with our special hashtag,
#BuildYourDashboard.

Today's Panelists

Christa Gannon
Founder & CEO

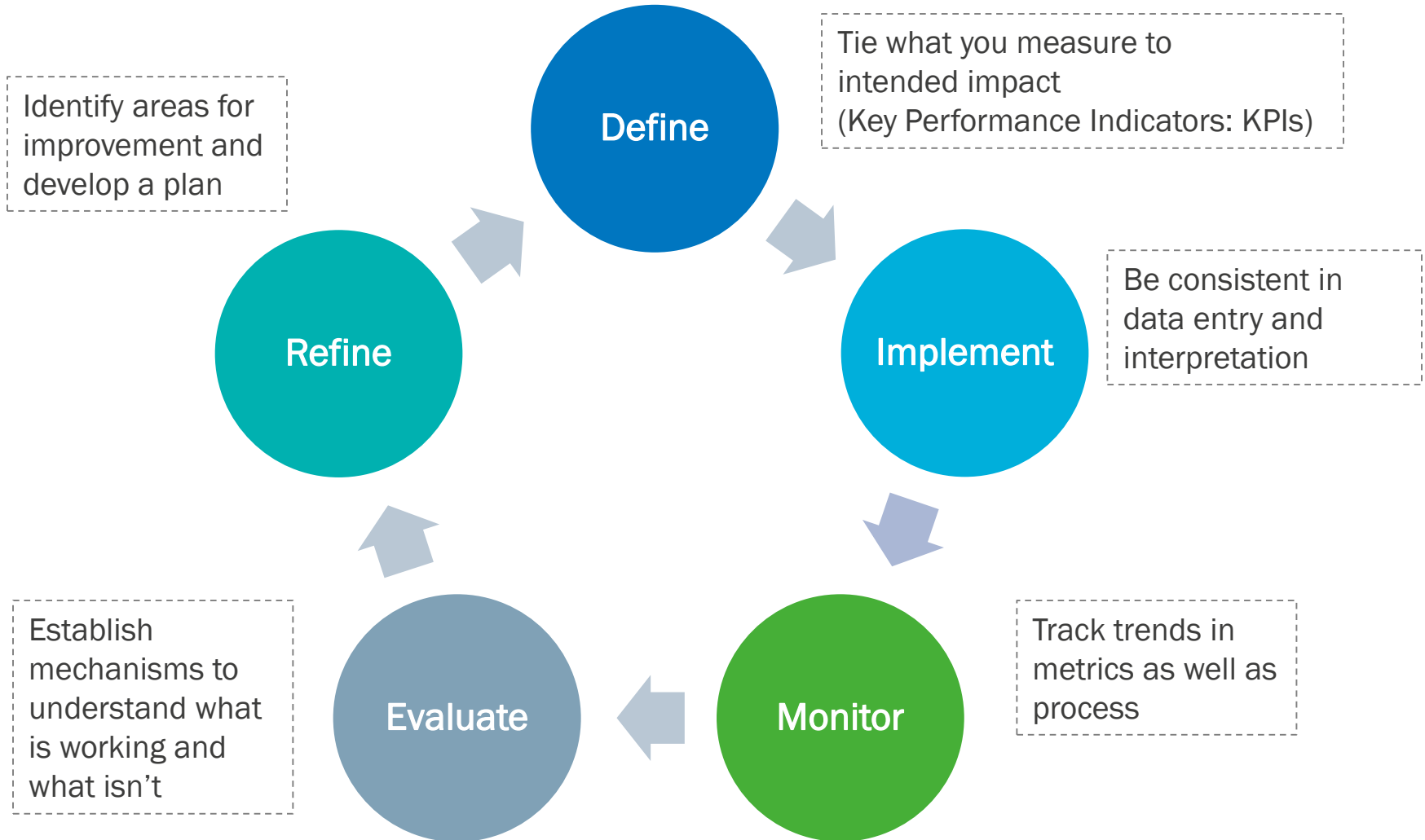


Fresh Lifelines for Youth

Jenny Ocón
Executive Director



The Performance Measurement Cycle



What Should We Measure?

KPIs can be defined across all areas of your organization

Financial Health

Fundraising &
Development

Programs &
Service Delivery

Human Capital

Marketing &
Communications

Outreach &
Advocacy

Information
Technology

Risk
Management &
Governance

Facilities &
Capital Projects

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Key Performance Indicators



Fresh Lifelines for Youth

Finance

- Operating Surplus/Deficit
- Budget vs. Actual by Program and County
- Net Asset Balance and Composition
- Liquid Unrestricted Net Assets (LUNA)
- Cash on Hand

Fundraising

- Annual Revenue by Source
- Individual Giving: Restricted vs. Unrestricted
- Board Giving



Key Performance Indicators



UpValley Family Centers

Finance

- Liquid Unrestricted Net Assets (LUNA)
- Operating Surplus/Deficit

Program

- Number of Unduplicated Clients Served Annually
- Client Ethnicity
- Client Survey Results

Fundraising & Communications

- Fundraising Status for UVFC Annual Fund
- Media Exposure (press coverage)



What Should We Measure?

Sample Key Performance Indicators (KPIs) for Nonprofit Organizations



Financial Health	Fundraising & Grants Management	Programs & Service Delivery
<ul style="list-style-type: none"> Liquid Unrestricted Net Assets (LUNA, also known as Operating Reserves) Net asset composition Days or months of cash on hand Organization-wide operating surplus/deficit Operating surplus/deficit by Program Operating revenue mix Expense mix Days Receivable 	<ul style="list-style-type: none"> Percentage of government grant remaining Funding award status (% awarded, submitted, pending submission) Contract compliance rate (% fully compliant) Number of funders/donors by type (government, foundation, individual, etc.) Donor retention rate (i.e. repeat donors from year to year) Percentage of Board members fulfilling give/get requirement 	<ul style="list-style-type: none"> Changes in knowledge, skills, abilities, and/or behaviors (e.g. pre- and post-scores) Client satisfaction rate Volunteer hours per period Program staff utilization rates Cost per service or unit Number of clients served Program attendance Program enrollment
Human Capital	Marketing & Communications	Outreach & Advocacy
<ul style="list-style-type: none"> Employee turnover/retention rate Employee satisfaction/engagement scores Average performance rating Time to fill vacancies Hours of staff training offered and completed Average absenteeism Number of workers' compensation claims Cost of HR services/Employee 	<ul style="list-style-type: none"> Number of unique website visitors Average time visitors spend on website Website page view and bounce rates Social media traffic Social media engagement (e.g. likes) Number of materials downloaded Media placements and press coverage Newsletter subscription growth rate 	<ul style="list-style-type: none"> Number of community events held Number of advocates trained Number of community commitments made vs. completed Percentage of activities where community feedback is requested Response time to inquiries Community event attendance rates
Information Technology	Risk Management & Governance	Facilities & Capital Projects
<ul style="list-style-type: none"> Number of helpdesk support requests Average response time to helpdesk requests Percentage of server storage available Bandwidth utilization rate Server down time Hardware failure rate 	<ul style="list-style-type: none"> Form 990 filed on time Data security system periodically verified On-time completion of safety drills or other relevant practices Board composition (e.g. skill sets and represented groups) Board engagement rate (number of activities attended/period) 	<ul style="list-style-type: none"> Capital campaign/financing progress vs. goal Maintenance costs per square foot Cost of office space per employee Average repair response time Percent of space utilized Number of user complaints Days ahead or behind schedule



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Q&A

Resources

Resources

- ***Models and Components of a Great Nonprofit Dashboard***, Hilda Polanco, Nonprofit Quarterly, 2016:
 - **Article:** <https://nonprofitquarterly.org/2016/05/09/financial-management-models-of-a-great-nonprofit-dashboard/>
 - **Webinar Recording:** <https://nonprofitquarterly.org/2016/02/17/models-and-components-of-a-great-nonprofit-dashboard/>
- ***Why Financial Dashboards Matter, and Five Pointers to Get You Started***, Neela Pal, FMA, Forbes, 2015:
<http://www.forbes.com/sites/skollworldforum/2015/04/09/why-financial-dashboards-matter-and-five-pointers-to-get-you-started/>

Resources

StrongNonprofits.org

In collaboration with the Wallace Foundation, FMA has created a library of tools and resources to help organizations become “fiscally fit”

Four Topic Areas: [Planning](#) | [Monitoring](#) | [Operations](#) | [Governance](#)



The Wallace Foundation / Knowledge Center / Resources for Nonprofit Financial Management

Share | Print | Email

Resources for Nonprofit Financial Management

Search Financial Management Resources

Overview | **Planning** | Monitoring | Operations | Governance | All Resources

SHOWN:

- General Resources
- Tools and Templates
- Case Studies

Planning Resources for Nonprofit Financial Management

Good planning finds the most effective ways to deploy your organization's resources – and meet your overall objectives. Materials here include help with budgeting, cost calculations and cash projections.

[Strengthening the Budget Development Process](#)

Resources

Online Tutorials for StrongNonprofits.org

FMA offers complimentary orientation one-hour webinars that feature an overview of the website and drill down on several of its key resources

Upcoming webinar dates:

- November 14, 2017 at 2:00pm ET
- January 23, 2018 at 2:00pm ET

To register, or see upcoming webinar dates:

<http://fmaonline.net/events>

For a 15-minute, on-demand webinar tour of the site:

<http://fmaonline.net/SNPonDemand>



*Look for a
refresh in
Fall 2017*



- Established in 1999 to serve not-for-profit organizations around the country
- Provides customized financial management, accounting, software, organizational development, and other consulting services
- Works directly with organizations or through funder-supported management and technical assistance programs

FMA exists to build a community of individuals with the confidence and skills to lead organizations that change the world

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