

WORKSHOP: BUILDING AN ORGANIZATIONAL DASHBOARD

August 18, 2011 2:00-5:00pm
Renton City Hall, Room 726

A workshop for agencies serving Renton.



Sponsored by the South King Council of Human Services and the City of Renton.

Presented by Nathan Phillips, SKCHS Director



AGENDA

- ① Introduction to agency dashboards
- ① What makes a good outcome
- ① Choosing what goes on the dashboard
- ① Drafting a working dashboard

WHAT IS A DASHBOARD?



WHAT IS A DASHBOARD?

- ① Visual
- ① Data
- ① Quick
- ① Agency Status
- ① Agency Progress



WHY USE A DASHBOARD?

- ③ Management Tool
- ③ Performance Snapshot
- ③ Helpful for Boards
- ③ Informative for Staff
- ③ External Uses and Marketing



DASHBOARD EXAMPLES

- ③ Many examples and templates of dashboards available on the internet.
- ③ Range from simple to highly complex.
- ③ Choose a style that is right for your agency or program.



FIVE DASHBOARD EXAMPLES

- ⦿ Is it visual?
- ⦿ Is there useful data?
- ⦿ Can you can it quickly?
- ⦿ Do you get a good sense of the program/agency status?
- ⦿ Do you get a sense of agency progress?

MEASURING OUTCOMES

- ◎ A vast field / An inexact science
- ◎ One resource (of many):
 - ◎ *Performance Measurement: Getting Results*, Harry P. Hatry, Urban Institute, 1999.
- ◎ Defined: A measurement on a regular basis of the results (outcomes) and efficiency of services or programs.

OUTCOMES: TERMINOLOGY

- ① Objectives
- ① Inputs
- ① Outputs
- ① Intermediate Outcomes (Benchmarks)
- ① End Outcomes
- ① Indicators



A GOOD OUTCOME

- ③ Measurable
- ③ Reflective of mission and total work product
- ③ Attributable to agency work product (something agency partly controls)
- ③ Aligned with funders/reportables

RESOURCES ON OUTCOMES

- ◎ Urban Institute's Outcome Indicators Project – an attempt to standardize the tracking of nonprofit performance (with samples by sector):
 - ◎ <http://www.urban.org/center/cnp/projects/outcomeindicators.cfm>
- ◎ Fieldstone Alliance: Benchmarking 101 for Nonprofits – built on the work of Jason Saul:
 - ◎ http://www.fieldstonealliance.org/client/tools_you_can_use/04-26-05_Benchmarking.cfm

WHAT GOES ON YOUR DASHBOARD?

“The art to creating a good dashboard is identifying what information really matters”
(Consultant & Trainer Kate Barr).

- ⊙ Choose key program outcomes.
- ⊙ Keep it simple; remember you are driving a car, not the space shuttle.
- ⊙ Capture the short-term and long-term picture.



WHAT GOES ON YOUR DASHBOARD (BESIDES OUTCOMES)?

- ① Finance information
- ① Human Resources information
- ① Board of Directors
- ① Compliance / Risk Management
- ① Fundraising/Development performance
- ① Community Engagement

EXAMPLE: FINANCE INFORMATION

1. Finance

	Target	6 months ago	Now
Days of unrestricted cash on hand	45 days	65 days	18 days
Net surplus or deficit YTD compared with YTD budget	Within 25K or better	\$42,500 worse than budget	\$28,000 worse than budget-to-date
Government funding year-to-date (52% of budget)	Within 3%	\$39,000 worse than budget	\$3,200 worse than budget, 24 days
Days from end of month to financial statements	24 days	87 days	48 days



BUILD A DRAFT DASHBOARD

- ① Now that you have seen what a dashboard can look like, try making one for your program or organization.
- ② Decide which elements are most important
- ③ Think about how to show both status and progress
- ④ Get creative about how to show your data visually.

DASHBOARD RESOURCES

- © A Nonprofit Dashboard and Signal Light for Boards, by J. Bell & J. Masaoka, Blue Avacado 2009, <http://www.blueavocado.org/content/nonprofit-dashboard-and-signal-light-boards>.
- © *The Nonprofit Dashboard: a Tool for Tracking Progress*, Lawrence M. Butler, BoardSource Publishing, 2007.
- © Results Scorecard 2.0, Results Leadership Group, <http://resultsleadership.org/scorecard/RSEMO/index.html>.

DASHBOARD RESOURCES

⊙ Templates:

- ⊙ <http://chandoo.org/wp/excel-dashboards/#free-dashboard-templates>

⊙ Design Ideas:

- ⊙ <http://www.bethkanter.org/das>
- ⊙ http://books.google.com/books/about/The_Say_It_With_Charts_Complete_Toolkit.html?id=ATyJmLhEYtAChboard-design/

CONSIDER OUTSIDE HELP

- ③ Find a list of all the capacity builders in the state at: <http://evans.washington.edu/research/centers/nancy-bell-evans/nonprofit-and-philanthropy-resources/support-and-training>
- ③ A searchable directory of consultants and professional services: <http://501commons.org/directory#>. It is still being populated, but the listings have all been vetted.
- ③ Consider a skilled volunteer, through a matching service like United Way or 501 Commons.
- ③ ONE-ON-ONE TECHNICAL ASSISTANCE FROM SKCHS