

**Forward Steps**  
CONSULTING

**DASHBOARDS:  
INFORMED DECISION-MAKING**  
FACETS

---

---

---

---

---

---

---

---

**INTRODUCTION**

- This is our final workshop together
- Goal of this workshop
  - Informed decision making
  - Why dashboards can help
  - How to construct a dashboard
- Please feel free to ask questions

11/12/2013 FORWARD STEPS CONSULTING

---

---

---

---

---


---

---

---

**WHAT IS A DASHBOARD?**

- Think about you car
- A way to share information
  - A visual representation
- A report that is quick to read
  - User friendly
- It is a tool, not an end result



11/12/2013 FORWARD STEPS CONSULTING

---

---

---

---

---


---

---

---

**NONPROFIT ORGANIZATIONS**

- **A tandem operation**
- **Administration**
  - Day-to-day operations, Implementation
  - Staff and/or Volunteers
- **Governance**
  - Oversight, Guidance, Support
  - The Board of Directors



11/12/2013 FORWARD STEPS CONSULTING

---

---

---

---

---


---

---

---

**EFFECTIVE NONPROFITS**

- **Mission-Based**
  - Have the intended impact
- **Financially strong**
  - Are a good return on investment
- **Results Oriented**
  - Act intentionally for greatest performance



11/12/2013 FORWARD STEPS CONSULTING

---

---

---

---

---


---

---

---

**ACTING INTENTIONALLY**

- **Plan**
  - Strategic
  - Business
- **Set targets**
  - Realistically, this is where we want to go
  - What do we want to accomplish
- **How will we know we have succeeded?**



11/12/2013 FORWARD STEPS CONSULTING

---

---

---

---

---


---

---

---

**KNOWING WHAT TO MEASURE**

- **Have the discussion**
  - Could be one of the most important
- **What are the metrics?**
  - Financial
  - Outcomes
  - Service usage
- **Dashboards will track your success metrics**



11/12/2013 FORWARD STEPS CONSULTING

---

---

---

---

---

---

---

---

**TYPES OF DASHBOARDS**

- **Simple ones**
  - Often paper based
  - Static
  - Manual updates
  - Single image
- **Complex**
  - Usually web based
  - Interactive
  - Real time update
  - Multiple image

11/12/2013 FORWARD STEPS CONSULTING

---

---

---

---

---

---

---

---

**PART 1 COMPLETED**

- **Overview of dashboards**
- **How they fit into the annual process**
- **Any questions?**
- **Next, is detail of creating a dashboard**

11/12/2013 FORWARD STEPS CONSULTING

---

---

---

---

---

---

---

---

**GETTING STARTED**

- **Mission**
  - Review your mission and understand it
  - Who are the clients?
  - What is the goal?
- **Vision**
  - The big shining city on the hill
  - What things are like when perfect
  - Based on your values

11/12/2013 FORWARD STEPS CONSULTING

---

---

---

---

---

---

---

---

**SET THE PLAN**

- **Getting There**
  - 3-5 years only
  - What do we need to do to achieve the vision?
- **Identify measurable Goals**
  - Outcomes
  - Financial structure
  - Facility
  - Come up with goals in at least 5 areas

11/12/2013 FORWARD STEPS CONSULTING

---

---

---

---

---

---

---

---

**THE DASHBOARDING PROCESS**

- What are we going to do?
- What answer do we need?
- What is the metric?
- Who will use the information?
- How will the dashboard be used?
- What should the dashboard look like?

11/12/2013 FORWARD STEPS CONSULTING

---

---

---

---

---


---

---

---

**WHAT ARE WE GOING TO DO?**

- **Make a decision**
- **Measure our impact**
- **Track risk factors**
- **Measure financial performance**



11/12/2013 FORWARD STEPS CONSULTING

---

---

---

---

---


---

---

---

**WHAT ANSWER DO WE NEED**

- **To take the action, what information is needed**
- **Strengthen our financial condition**
  - **Where the money is going**
  - **Where we are losing money**
- **Increase enrollment**
  - **How are our SAT scores?**
  - **Where do graduates end up?**



11/12/2013 FORWARD STEPS CONSULTING

---

---

---

---

---

---

---

---

**THE METRIC IS NEXT**

- **What is a metric?**
  - **A piece of quantitative assessment used for analysis**
  - **A system of measurement that will help us answer the question**
- **What is the information we need:**
  - **A thumbs up/thumbs down assessment?**
  - **A trend over time?**
  - **A comparison?**

11/12/2013 FORWARD STEPS CONSULTING

---

---

---

---

---


---

---

---

**IDENTIFY THE METRIC**

- **Examples of metrics:**
- **Financial**
  - **Income by revenue stream over time**
- **Outcome: the achievement gap**
  - **Ratio of grades for students of different color**
- **Mission**
  - **Level of investment in each program area**



11/12/2013 FORWARD STEPS CONSULTING

---

---

---

---

---

---

---

---

**GOOD METRICS**

- **A good metric is:**
- **Understandable**
- **From a reliable source**
- **Easy to capture data**
- **Can lead to a decision or action**

11/12/2013 FORWARD STEPS CONSULTING

---

---

---

---

---

---

---

---

**WHO IS USING THE DASHBOARD?**

- **Internal vs External**
  - **Could determine how revealing**
- **Knowledgeable re Mission vs Inexperienced**
  - **You may have to embed extra information**
- **Sophisticated using data vs Raw?**
  - **May have to make it very basic**

11/12/2013 FORWARD STEPS CONSULTING

---

---

---

---

---

---

---

---

**WHAT IS THE CONTEXT?**

- **In a group meeting?**
  - On paper or on the wall?
  
- **One-Off or Updated?**
  - How to show the change since last time?
  
- **How often does it need to be updated**
  - If often, make it easy to do and access

11/12/2013 FORWARD STEPS CONSULTING

---

---

---

---

---

---

---

---

**PAUSE**

- **Looked at the overview**
  
- **Looked at the process**
  
- **Any questions?**
  
- **Next are the types of dashboards**
  - We'll look at simple ones

11/12/2013 FORWARD STEPS CONSULTING

---

---

---

---

---

---

---

---

**A GOOD DASHBOARD**

- **Clear**
  - Make it easy to understand
  - Avoid too much narrative explanation
  
- **Concise**
  - Avoid adding too much information
  - Use only what you need to answer the questions
  
- **Compelling**
  - Yes, make it pretty
  - Make sure it answers the question

11/12/2013 FORWARD STEPS CONSULTING

---

---

---

---

---

---

---

---

### PIE CHART

- **Benefits**
  - Very simple
  - Good for breaking out percentage of a whole
  - Use on an income analysis, for example
  
- **Limitations:**
  - Static
  - No comparisons or context
  - One-off

11/12/2013

FORWARD STEPS CONSULTING

---

---

---

---

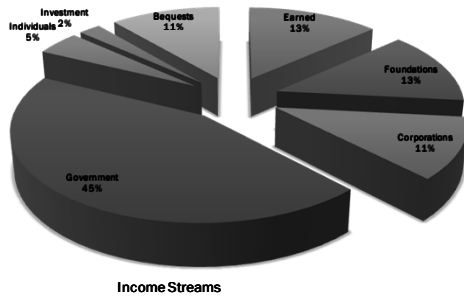
---

---

---

---

### PIE CHART EXAMPLE



---

---

---

---

---

---

---

---

### CREATE A PIE CHART IN EXCEL

- Open excel
- Enter the data
- Highlight all of the data and the header
- Click on "insert" tab
- Click on "Pie" drop down menu and select the 3-d one with break outs.
- In the "Chart layouts" bar, select the one you like, I used %
- Click on "move chart" and select new page.

11/12/2013

FORWARD STEPS CONSULTING

---

---

---

---

---

---

---

---



**BAR CHART**

- **Benefits**
  - Can show trends
  - Can show comparisons
  - Good to show relative amounts
- **Limitations**
  - Static
  - Sometimes hard to tell specific amount
  - Easily gets cluttered

11/12/2013 FORWARD STEPS CONSULTING

---

---

---

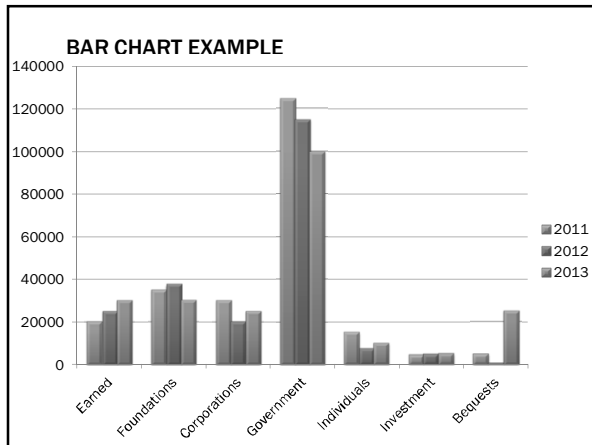
---

---

---

---

---



---

---

---

---

---

---

---

---

**STOP AND GO LIGHTS**

- **Benefits**
  - Good to show status of a process
  - Fosters next steps discussion
  - Can be adjusted over time
- **Limitations**
  - Static
  - Relies on text
  - Shallow information, often subjective

11/12/2013 FORWARD STEPS CONSULTING

---

---

---

---

---

---

---

---



**QUADRANTS**

- **Benefits**
  - A focus for group analysis
  - Demonstrate preferences and values
  - Decision-making tool
- **Limitations**
  - Simplistic by nature
  - Impulse to decide based on placement
  - Overly subjective?

11/12/2013 FORWARD STEPS CONSULTING

---

---

---





---

---

---

---

---

	
Mission	
	
	Profitability

11/12/2013 FORWARD STEPS CONSULTING

---

---

---

---

---

---

---

---

**DESIGN DECISIONS**

- **Number of dashboards**
  - How many on a page/screen?
- **Placement**
  - Top left is #1
- **Type face**
  - Larger implies emphasis
- **Illustrations?**
  - Can be fun or leading

11/12/2013 FORWARD STEPS CONSULTING

---

---

---

---

---

---

---

---

**SCENARIO: CHOICE SCHOOL**

- **School in central city**
- **Almost 100% of enrollment through Choice**
- **Hitting the financial wall:**
  - **Need help thinking this through**

11/12/2013 FORWARD STEPS CONSULTING

---

---

---

---

---

---

---

---

**CHOICE SCHOOL - 2**

- **Commissioned Financial Task-Force**
  - **3 Board Directors**
  - **2 Board Candidates**
  - **Internal Accountant**
  - **External Accountant**
- **The Action:**
  - **We need to make decisions that will bring us back to financial security**

11/12/2013 FORWARD STEPS CONSULTING

---

---

---

---

---

---

---

---

**CHOICE SCHOOL - 3**

- **Our Task:**
  - **Wanted them to understand the school**
  - **Move to bigger questions**
- **Give the information but...**
  - ⇒ **Too much detail would bog it down**
  - ⇒ **2 accountants would look at details**
  - ⇒ **Board Directors not strong financially**
  - ⇒ **2 outside people don't need to know details**

11/12/2013 FORWARD STEPS CONSULTING

---

---

---

---

---


---

---

---

**QUESTION #1**

- What are the schools finances like currently?
- Where does the money come from?
- Where is the money going?



11/12/2013

FORWARD STEPS CONSULTING

---

---

---

---

---

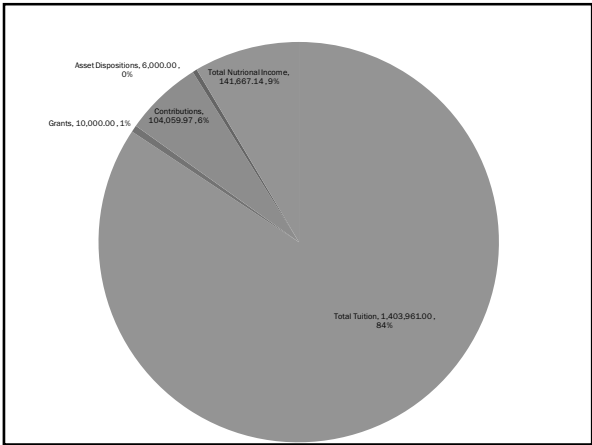
---

---

---

---

---




---

---

---

---

---

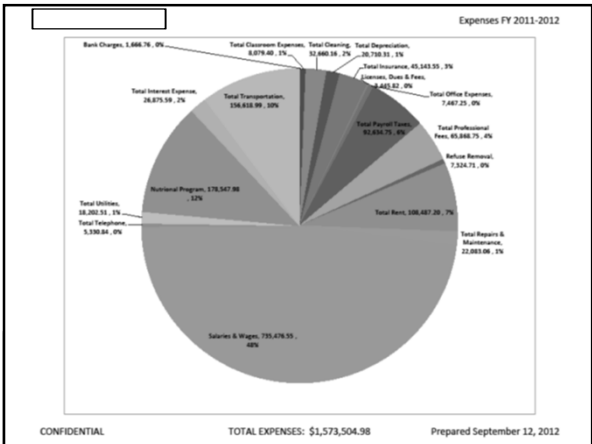
---

---

---

---

---




---

---

---

---

---

---

---

---

---

---

**CHOICE SCHOOL**

- Simple chart as dashboard
- Nothing Dramatic
  - Expenses in line
  - Income heavy on tuition
- Next Question:
  - What are the costs to educate?
  - Is it the same at each level of the school?

FORWARD STEPS CONSULTING

---

---

---

---

---

---

---

---

---

---

---

---

	2009 to 2010 School Year				2010 to 2011 School Year				2011 to 2012 School Year			
	K4-12th	K4-4S	1-8	9-12	K4-12th	K4-4S	1-8	9-12	K4-12th	K4-4S	1-8	9-12
Net Eligible Program Cost	\$1,221,987	\$169,774	\$839,188	\$213,025	\$1,322,211	\$182,269	\$911,314	\$228,634	\$1,418,735	\$197,586	\$923,149	\$297,999
All Pupil FTE Average	179	26	120	33	199	28	136	36	219	31	143	46
Summer School FTE	10	0	10	0	6	0	6	0	0	0	0	0
Total Membership FTE Basis	189	26	130	33	205	28	142	36	219	31	143	46
Per Pupil Cost for all Pupils	\$ 6,455	\$ 6,455	\$ 6,455	\$ 6,455	\$ 6,440	\$ 6,440	\$ 6,440	\$ 6,440	\$ 6,478	\$ 6,478	\$ 6,478	\$ 6,478
Net Eligible Program Cost	\$1,221,987				\$1,322,211				\$1,418,735			
Less K4-12th Payroll	\$ (508,751)				\$ (702,059)				\$ (579,302)			
Less Rent	\$ (93,350)				\$ (92,022)				\$ (108,487)			
Subtotal	\$ 660,086	\$ 91,707	\$ 453,304	\$ 115,069	\$ 528,130	\$ 72,807	\$ 304,033	\$ 91,330	\$ 736,946	\$ 102,634	\$ 479,520	\$ 154,792
K-4S Payroll	\$ 48,000	\$ 48,000			\$ 66,857	\$ 66,857			\$ 53,302	\$ 53,302		
1-8th Payroll	\$ 296,757		\$ 296,757		\$ 436,772		\$ 436,772		\$ 327,000		\$ 327,000	
9-12th Payroll	\$ 164,000		\$ 164,000		\$ 198,400		\$ 198,400		\$ 193,000		\$ 193,000	
Rent	\$ 53,150	\$ 8,626	\$ 39,360	\$ 5,150	\$ 92,022	\$ 8,292	\$ 39,702	\$ 44,012	\$ 108,487	\$ 8,449	\$ 39,479	\$ 60,487
Adjusted Net Eligible Prog Cost	\$1,221,987	\$148,333	\$789,421	\$264,219	\$1,322,211	\$147,956	\$840,907	\$383,742	\$1,418,735	\$164,389	\$849,992	\$408,279
All Pupil FTE Average	179	26	120	33	199	28	136	36	219	31	143	46
Summer School FTE	10	0	10	0	6	0	6	0	0	0	0	0
Total Membership FTE Basis	189	26	130	33	205	28	142	36	219	31	143	46
Per Pupil Cost for all Pupils	\$ 6,455	\$ 5,640	\$ 6,072	\$ 8,013	\$ 6,440	\$ 5,228	\$ 5,940	\$ 6,402	\$ 6,478	\$ 5,300	\$ 5,937	\$ 8,876
High Tuition per Student	\$ 8,218	\$ 6,218	\$ 6,218	\$ 6,218	\$ 6,153	\$ 6,153	\$ 6,153	\$ 6,153	\$ 6,410	\$ 6,410	\$ 6,410	\$ 6,282
Low Tuition	\$ (788)	\$ (877)	\$ (145)	\$ (2,399)	\$ (787)	\$ (626)	\$ (713)	\$ (8,249)	\$ (881)	\$ (1,070)	\$ (479)	\$ (2,686)

---

---

---

---

---

---

---

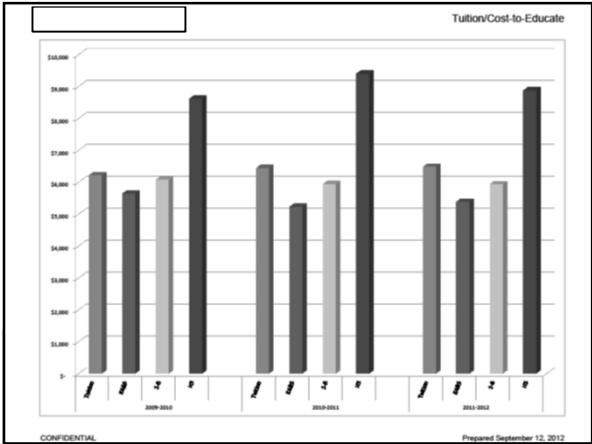
---

---

---

---

---




---

---

---

---

---

---

---

---

---

---

---

---

**SCENARIO #2 – PROGRAM ASSESSMENT**

- **A community facility with mission to create a gathering place sharing art, performances, and history.**
- **Following Board retreat, call to assess programs.**
- **Program task force**
  - **Find a way to assess programs**
  - **Bring information back to the Board**

11/12/2013 FORWARD STEPS CONSULTING

---

---

---

---

---

---

---

---

**SCENARIO #2 – THE QUESTION**

- **Action:**
  - **Decide whether to add or drop programs**
- **Question:**
  - **Are they mission relevant?**
  - **How else to assess them?**

11/12/2013 FORWARD STEPS CONSULTING

---

---

---

---

---

---

---

---

**SCENARIO #2 – THE CONTEXT**

- **Audience:**
  - **Very knowledgeable Board and staff**
- **The usage:**
  - **Task Force meeting**
  - **Board meeting**

11/12/2013 FORWARD STEPS CONSULTING

---

---

---

---

---

---

---

---

**SCENARIO #3 - PROCESS**

- **Step 1**
  - Identify the metrics
    - ⇒ Mission, profit, brand value, fun, etc.
- **Step 2**
  - Gather the information
    - ⇒ Fact, perceptions
- **Step 3**
  - Design the dashboard

11/12/2013 FORWARD STEPS CONSULTING

---

---

---

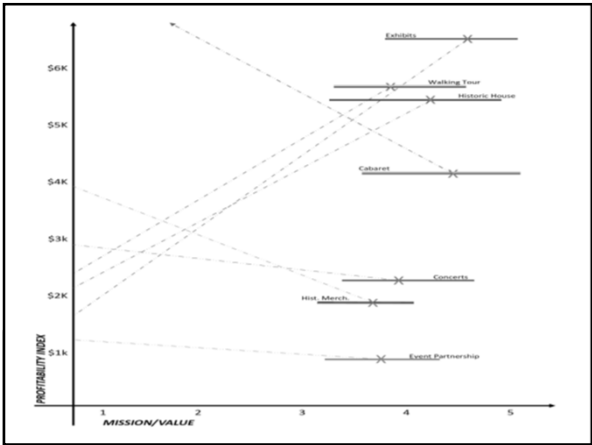
---

---

---

---

---



---

---

---

---

---

---

---

---

**CONCLUSION**

- Dashboards are often a good tool
  - Not always - sometimes detail
- Final questions?

11/12/2013 FORWARD STEPS CONSULTING

---

---

---

---

---

---

---

---





---

---

---

---

---

---

---

---