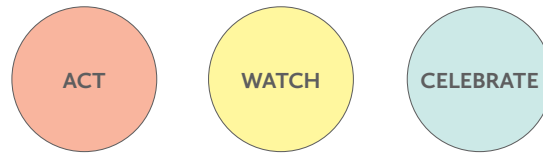


Sample Dashboard #1 for Nonprofits

XYZ ORGANIZATION

A dashboard helps senior leaders track key performance indicators (KPI) at a glance. To create an effective dashboard:
 1) Make it easy to read. 2) Use color to focus attention. 3) Keep it simple to update. 4) Adjust metrics as needed.



	TARGET	6 MONTHS AGO	NOW
FINANCE:			
Unrestricted cash on hand	60 days	65 days	55 days
Year-Over-Year (YOY) growth (Budget increase over previous fiscal year)	3%	6%	4%
Liquid Unrestricted Net Assets (LUNA) (Assets that could be converted to cash)	\$25K	\$5K	\$8K
Program efficiency (Budget used for overhead)	35%	30%	30%
FUNDRAISING:			
Total gifts (MOS, QTR, YRLY)	5 per QTR	3 per QTR	7 per QTR
Major gifts (\$10K+)	1 per QTR	1 per QTR	2 per QTR
Gifts per donor segment	2: \$1-5K	1: \$1-5K	3: \$1-5K
	2: \$5-10K	1: \$5-10K	2: \$5-10K
	1: \$10K+	1: +\$10K	2: \$10K+
Pledge fulfillment	90%	80%	86%
BOARD OF DIRECTORS:			
New members	3 by Sept	2 in July	Still 2 as of Aug
Attendance	80%	80%	88%
Board member self-evaluations complete	By Aug	NA	Done
Annual Board evaluation complete	By Oct	NA	NA



PROGRAMS AND IMPACT:			
Beneficiaries served	50 a year	63	89
First-time clients	15	23	26
Program attendance (% of targeted participation achieved at a specific program)	25%	32%	22%
Beneficiary satisfaction rate	10% survey completion rate/ 80% satisfaction	12% survey completion rate/ 67% satisfaction	11% survey completion rate/ 82% satisfaction
Pre/post scores (Growth of knowledge, skills, abilities, and/or behaviors in program participants)	90% standard deviation (SD)	92% SD	94% SD

HUMAN RESOURCES:			
Employee satisfaction rate (Net Promoter Score)	9	6	7
Performance evaluations complete	90%	Didn't track	86%
Workers' compensation claims open	0	2	1
Percentage of people of color	50%	44%	42%

RISK MANAGEMENT:			
990-N Form complete	100% by Nov	NA	Applied for Extension
Emergency action plan	Updated by Oct	NA	Not due yet
Fire drill	Monthly	Began monthly drills July	Monthly
Tech audit	Twice annually	Not done	Not done

MARKETING:			
Website page views per month	500	237	320
Email click-to-open rate (CTOR) and click-through rates (CTR)	15% CTOR 3% CTR	12% CTOR 4.2% CTR	13% CTOR 4.4% CTR
Email conversion rates	3%	3.7%	3.8%
Landing page conversion rates	5%	3%	3.2%



Dashboard for Nonprofits (Sample #2)

KEY METRICS

Note: for ongoing metrics, current year data is "to date" unless otherwise noted

Data Arrangement

Highest value (past 4 years)	Current Year
Lowest value (past 4 years)	Last Year

Change from Previous Year



*blank or N/A if last year or current year are unavailable

Undergraduate Applications (14-15 Add'l Application Requirements)

4,577	↑	4,577
3,033		3,033

6-year Graduation Rate

61.4%	↓	52.9%
50.9%		61.4%

Traditional Full-Time Students (Matriculated)

563	↓	473
453		488

First-time, Full-time Freshman Retention (Fall to Fall)

68.4%	N/A
60.0%	64.0%

Full-time based traditional overall student retention (spring to fall)

85.0%	↑	85.0%
75.0%		82.8%

Total fall non-duplicating head count (full-time, part-time, transfer, semester in the city, online, etc.)

593	↓	488
488		530

Development Goal (in millions)

\$11.1	↓	\$9.0
\$8.6		\$8.6

Overall Net Tuition Per Student

\$13,615	↑	\$13,615
\$10,487		\$12,771

First-Year Full Time Net Tuition Per Student

\$13,850	↑	\$13,850
\$10,000		\$13,514



Executive Director Monthly Dashboard Report Template

XYZ ORGANIZATION

Submit to board on the 15th of each month.

Executive Director S.M.A.R.T. Goals: Specific, Measurable, Achievable, Realistic, Time-related

YEAR	TARGET DATE	NOTES	STATUS
1. Revenue and Expenses: Achieve year-end net income goal of \$40K based on revenue of \$500K and expense of \$460K	12/31/23		<input type="checkbox"/> ● Needs Immediate Attention <input type="checkbox"/> ● Monitoring Required <input type="checkbox"/> ● On-Track
2. Operating Reserves: Increase operating reserves from \$114K to \$154K (equivalent to 4 months of the FY 2021 expense budget)	12/31/23		<input type="checkbox"/> ● Needs Immediate Attention <input type="checkbox"/> ● Monitoring Required <input type="checkbox"/> ● On-Track
3. Board Member Recruitment: Assist board with cultivating five new board prospects for quarter 1, 2023	10/31/23		<input type="checkbox"/> ● Needs Immediate Attention <input type="checkbox"/> ● Monitoring Required <input type="checkbox"/> ● On-Track
4. Three-Year Rolling Strategic Plan: Based on board feedback, recommend final version of 2023-25 Strategic Plan to board	9/30/23		<input type="checkbox"/> ● Needs Immediate Attention <input type="checkbox"/> ● Monitoring Required <input type="checkbox"/> ● On-Track
5. Vision 2025 Resource Center: Implement Phase 1 Pilot Program of Vision 2025 Virtual Resource Center, including cultivation, recruitment, orientation, engagement of two state coordinators, ten area coordinators, 50 local business sponsors, church ambassadors	9/15/23		<input type="checkbox"/> ● Needs Immediate Attention <input type="checkbox"/> ● Monitoring Required <input type="checkbox"/> ● On-Track

Date Submitted: _____ Period Covering: _____

Executive Director Signature: _____