

## Developing dashboards for your charity board: Efficient ways to get information, monitor performance and make decisions

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Many nonprofit boards struggle to get a good balance between getting sufficient information and being swamped with pages and pages of reports, containing figures and all manner of information. Most boards value concise, summary information while knowing that the detail exists and has been reported and discussed at the appropriate executive or committee level.

So what information is needed and how best to present it? Using dashboards is seen by many as an efficient way to present key information in a user friendly format. Linking strategic objectives to programmes and projects, organisations can develop relevant targets that staff (and board members) can work towards. These can also act as monitoring tools guiding those reporting to prepare relevant explanations about why actual performance is significantly different from the target.



At our recent seminar on [Building Better Governance](#), a really enthusiastic and engaged group discussed ways of preparing and reporting using dashboards. Key information relating to staff satisfaction, trustee attendance at meetings and levels of unrestricted reserves provide valuable information about matters that can be of concern for organisations. As part of the organisation's strategic thinking process decisions might have been made about increasing the level of reserves, or improving board effectiveness by monitoring board member attendance at meetings.

Participants at the session felt that:

the use of [traffic light \(RAG reporting\)](#) was a very useful way for the senior management team to focus the board's attention on important matters (RED), reporting on things that are moving in the right direction (GREEN) and things to watch out for (AMBER).

Developing key performance indicators that are linked to strategic objectives also enables staff and board members to keep strategy in sight and link performance to objectives in a “smart” way.

Charity trustees are required by law to report on their organisation’s activities and achievements in an annual report. This is also a useful opportunity to showcase the good work that the charity does, what it achieved during that year, with pictures of projects, programmes and activities, accompanied by relevant KPIs that can inspire the reader to support the worthwhile cause!

Boards that have not yet developed KPIs or feel that the reports they get currently need to be refreshed, can extend the strategic thinking process to enable them to develop KPIs as part of their dashboards for reporting and monitoring purposes. Understanding what is core to the organisation’s being is of course an important starting point.

Are we providing a much needed service?

How do our service users feel about our services?

Is our service delivery cost effective?

Is a branch covering its running costs?

These are just some of the questions that KPIs can provide information on and thus be included on the dashboards of nonprofits.

If you’d like to know more about better board reports and developing dashboards, join me at our next regional session (Scotland) [SCVO’s Building Better Governance programme](#)

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