

The Dashboard Difference: How a Cutting-Edge Technology Tool Is Changing the Game

Make better decisions by viewing your data in a new way.

By Nate DeGrande & Yvette Williams

The ability to manage large amounts of information is essential for nonprofits. From convoluted financial data to large donor rolls, making sense of complexity is part of the job description. With that in mind, it's not surprising that many nonprofits have turned to powerful business intelligence (BI) tools to organize that information.

These tools make it possible to gather and manage more data than ever before. But they don't all present the information in a way that makes it easier to comprehend. For a board of directors, that means struggling to make sense of mounds of data without the context required for true understanding.

And, while it might seem like more information is always better, too much unstructured data can make it *harder* to make informed decisions. Data without context can create confusion instead of leading to insight.

To overcome these challenges, some nonprofits are turning to a promising tool: the dashboard. Electronic dashboards provide a single-screen display that brings multiple streams of data into a unified presentation.

This customized view of selected metrics makes sense of enormous amounts of information in a single glance. The best dashboard solutions are intuitive, accessible, and visually dynamic. They cut through the chaos to provide clarity.

Impact and Influence: A Case Study

For years the United Way of Metropolitan Dallas struggled to overcome a structural problem: The organization's donor database and its financial platform were incompatible systems. Another challenge was that the organization's internal reporting system was old and outdated.

A dashboard solution addressed both issues. The new dashboards bridged the gap between the separate database systems. The dashboards introduced upgraded reporting, making it possible to present board members with real-time, understandable, meaningful data.

The organization's leaders can now track revenue and key performance indicators. They can monitor progress for both short-term projects and long-term goals, making it easy to measure achievements.

The organization uses the new dashboards to rigorously track things like annual fundraising. The ability to know precisely where money is coming from and where it's going during a given time period is incredibly important. The dashboards also make it possible to measure the impact of those funds, drawing a clear line between the organization's efforts and the results.

The dashboard difference has been noteworthy. The organization is operating more efficiently – and it has the reporting to prove it. The flexibility of the dashboards and the new reporting functions make it simple to switch between high-level budget summaries to more granular detail that reveals opportunities for improvement.

One welcome enhancement is that the immediacy and real-time character of the new system has prompted employees to stay on top of reporting and documentation better than ever before. Knowing that the CEO or a board member could be looking at the information that very day is a strong motivator that helps keep everyone accountable.

Dashboard Categories

Below are some of the most common dashboard applications:

Business intelligence dashboards are internal resources that make it possible to monitor everything from fundraising initiatives to outside donations and other performance measures.

Status dashboards monitor key performance indicators such as fundraising goals or other milestones. Status dashboards are also powerful communication tools, keeping employees aware of progress, new information, and special events as they happen.

Accountability dashboards present information to the public or to outside organizations for community outreach and public relations purposes. These dashboards can provide details about how money is being spent and what kind of impact it is having (information that is even more powerful when connected to results that can be seen in the surrounding community).

Tracking dashboards provide a real-time flow of information to monitor things like web traffic and social media metrics.

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Scenario comparison dashboards allow you to game-plan different real-world scenarios to provide a clear and compelling example of what possible outcomes might look like. This predictive power can be an important selling point for potential donors.


Best Practices

Use these practices to design your own dashboard solution:

Prioritize. Consider where your dashboard will be most effective, and roll out the new system in that area. Typically, nonprofits start by upgrading reporting capabilities for the board and then introduce dashboard functionality for finance, fundraising, and human resources.

Strategize. Dashboards are only as good as the information that goes into them. One of the most important steps is to decide what data your dashboard will feature, including the metrics you track. Focus on the key performance indicators that are most important to your organization. Work to strike a balance between sufficient detail and big-picture clarity, understanding that broad context and detailed analysis are equally valuable.

Integrate. A big part of setting up a new dashboard solution is training new users. While the best dashboards offer an intuitive and user-friendly interface, proper training is still essential. One effective strategy is to train key stakeholders first and utilize their knowledge and enthusiasm to help other employees during the training process. If possible, work with a dashboard provider who offers a detailed and comprehensive training, support, and ongoing maintenance program.

Delegate. Make thoughtful decisions about who will be using the new dashboard solution (and who should have access to what information). The most sophisticated dashboard solutions offer a wide range of options that can be customized for a variety of users. A member of the executive team, for example, will need to look at a very different set of variables than someone in human resources. 

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