6 Best Practices to Get the Fundraising Dashboard You Deserve

By Robert Girardi

Dashboards are single computer screens that give vital information in the form of graphic panels. They get their name from car dashboards, naturally; both let you see a total view of data you need to "drive" forward.

But think for a moment: What if your car dashboard showed you only the time of day and whether your lights were on? What if you had to open the glove compartment to determine your speed, look into the back seat to check the oil pressure and flip down the sun visor to see the engine temperature?

Ridiculous, you might say, and you would be right. Think, however, about the situation that many in the nonprofit world encounter in their quest to get the data they need to do their jobs effectively. They jump through hoops to get the data on which they rely, or they live with dashboards that are overly simplistic or just do not provide the information they need.

Now consider the converse: an ideal fundraising dashboard gives you and your organization current, accurate information on the most important measures of your fundraising efforts, achievements and operational issues—all in one place. It makes relevant data immediately available and easily understandable. Instead of having to pull reports or query your database, once you create your dashboard the information is always there, as soon as you log into your computer.

Having information in dashboard form offers a multitude of benefits:

- **Ensuring your nonprofit's goal-driven, performance-based fundraising culture:** A fundraising dashboard clearly communicates objectives to your fundraising team, keeping everyone on track and up to date. Everyone can easily see the progress they as individuals and the team have made in achieving those objectives. (And, with the ability to personalize their dashboards, people can see the information that matters most to them and filter information they might not need.) Simple examples are having panels that look at monthly giving this year against last, a count of new memberships, the current rate of donor retention and other measures of success.
- **Easy identification of operational problems or negative trends:** The ability to get a jump on issues or trends that need attention is another key benefit of a fundraising dashboard. You get immediate notice about problems and, further, you can quickly click on the relevant panel, chart or link to get more information—again, all without having to pull a report or data view. Your donor services department, for instance, might benefit from having a panel that alerts them when batches are failing to post.
- **Immediate availability of data that executives and managers need to make informed decisions:** The at-your-fingertips availability of organizational KPIs helps executives and managers more easily monitor the performance of campaigns, appeals and staff efforts; provides detailed information useful in making decisions; and allows for fine tuning fundraising efforts. For instance, a dashboard panel could show immediate results from specific appeals. If you notice a lower-than-expected response to an appeal, you can quickly take steps to find out what's causing the issue and mitigate it.
- **The means to take fast action:** Once you've drilled down into a dashboard panel's data and found the cause of a noteworthy (positive or negative) result, you can often immediately take actions like exporting and sharing information with colleagues, adding context to the report with remarks, and more.

Getting to this state of dashboard nirvana is possible, but, as with anything worth having, it takes some effort. This article will provide you with some baseline best practices for developing dashboards, practices that will direct you to a useful result—a working, meaningful fundraising dashboard.

1. Understand the dashboard concept

En route to gaining an accurate understanding of what business intelligence experts consider a genuine dashboard, let's start with what dashboards are not. First, dashboards are not portals. A portal is a collection of different applications you use regularly, offered up on a screen that you might be able to personalize. A dashboard can be part of a portal, but not the other way around. Second, dashboards are not simply collections of panels displaying information like upcoming event dates, general statistics and other non-strategic data.

Instead, a true dashboard is a hard-working expanse of screen real estate. Formal definitions of dashboards abound:

An easy to read, often single-page, real-time user interface, showing a graphical presentation of the current status . . . and historical trends of an organization's key performance indicators (KPIs) to enable instantaneous and informed decisions to be made at a glance. ("What is Dashboard Reporting," McFadden, Peter, 2012)

A rich computer interface with charts, reports, visual indicators and alert mechanisms that are consolidated into a dynamic . . . information platform. ("Enterprise Dashboards: Design and Best Practices for IT," Malik, Shadan, 2005)

Perhaps the most cogent definition comes from business intelligence expert Stephen Few, who says a dashboard is:

. . . a visual display of the most important information needed to achieve one or more objectives; consolidated and arranged on a single screen so the information can be monitored at a glance. ("Dashboard Confusion," *Intelligent Enterprise*, Few, Stephen, March 2004)

All these definitions, however varied, capture the essential characteristics of genuine dashboards: They make a range of meaningful data visual; show information like measurements of important factors, benchmarks, alerts and KPIs; and present the information in an easily understandable, graphical way.

Dashboards come in three basic flavors:

Operational dashboards display data that keeps you informed about the operational side of your nonprofit: gift processing, acknowledgments, pledge booking, etc. For example, if your organization sees heavy website traffic and offers online giving opportunities, you might monitor the site's server uptime in an operational dashboard. This kind of dashboard usually relies on real-time data and tells you if you're on target *today*.

Strategic dashboards typically show the fundraising KPIs that management tracks on a regular basis. They use pictures of data--daily, weekly, monthly and so on--that do not change from moment to moment but often do trend over time. These dashboards ideally offer executives and managers a 10,000-foot view of how fundraising (at individual and organization-wide levels) is performing, like year-to-date giving, campaign progress, gift officer pipelines and more. Having this information available at a glance helps managers keep abreast of the health of and opportunities for your nonprofit.

Analytical dashboards can contain operational and strategic data. Their key difference is that they allow you to drill down into the data to gain more insight. Simply put, analytical dashboards are designed to help your organization set goals based on insights into data that you've collected over a period of time and set future targets.

2. Be strategic about what you want your dashboard to do

Because dashboards are versatile, they can be as varied as the organizations that use them. Some of the most basic functions of dashboards are:

- Helping your organization's executive and managers define what is important
- Educating staff about key issues and measures
- Tracking results for people or teams
- Encouraging people to take specific actions
- Flagging people when certain milestones or problems occur
- Communicating progress and success against goals

The range of functions dashboards can serve is, arguably, endless. Thus, the first step in creating a dashboard that people in

your organization will find useful (versus one that's just pretty) is to establish exactly what you want the dashboard to do for your organization.

The best way to make that determination is to answer thoughtfully and completely some vital strategic questions:

What problem(s) are we trying to solve? What processes do we want to make more efficient?

Identifies what is driving your need for a dashboard and helps set the scope of the project

What are our goals?

Focuses thinking about what you want the dashboard to help achieve and aligns those goals with your fundraising strategy

What gaps exist in our performance?

Makes clearer the set of measurements you'll want to include in the dashboard

What information will be useful and fruitful?

Helps you identify which information is interesting but not necessary to include or simply superfluous

What information do we want to make readily available?

Reveals the content of the actual dashboard panels

Who will use the dashboard(s)?

Determines specific panels to include and the type of dashboard (strategic, operational, analytical)

If you've ever developed a strategy for a capital campaign or a communications program, for instance, you know that the more strategic and specific you can be about what you want to accomplish, the greater the chance that you'll achieve what you want. The same holds true for creating your dashboard.

Why Dashboards Work

Interestingly, the effectiveness of dashboards actually has a neurological basis. Today's world of ubiquitous communication, interruptions and devices bombards us constantly with a multitude of pieces of data. Neurologists have proven that our brains can store only so much information. Our short-term memory can only hold about seven pieces of information at any given moment, and even those seven pieces fade from short-term memory after about 20 seconds. ("Short-Term Memory and Web Usability," Nielsen, Jakob, December 2009) A dashboard overcomes the limitations of short-term memory. You see relevant information on one screen within your range of vision, and you no longer need to depend on your short-term memory to do that work.

Because the human brain processes a number, visualization or picture as a chunk of information, a report or data table filled with numbers requires the brain to store and remember multiple chunks while visualizations or pictures require single chunks. Thus, the brain can understand and gain insight much faster from a visualization like a dashboard panel.

3. Address each dashboard to one audience

Once your organization answers the strategic questions, you might conclude that you need more than one dashboard. Many organizations do, and that's fine. The key to making sure each dashboard you create is useful is to define clearly the audience for each. That's important because the design, features and training required for each dashboard will differ based on the role of the person or people using it. If you overlook this best practice, the resulting dashboards are often overloaded with unrelated information and, thus, likely not as useful as they could be.

Don't imagine that limiting each dashboard to one audience means that you can't create an organization-wide dashboard. You certainly can, as long as you're quite clear about what information will actually benefit the entire organization.

You can consider creating dashboards for:

- Your entire organization
- Divisions, chapters or departments
- Specific processes (e.g., the opportunity pipeline for your major giving effort)
- Specific people
    - executives who want an interactive dashboard on an iPad
    - major gift officers who want to access their dashboards on their smartphones

- department managers who want to quickly get detailed data from reports
- donor services staff who need to share reports with boards or clients

- Applications like wealth screening or event management

4. Focus on visual communication

Making your dashboard useful does not necessarily translate to making it pretty. A good-looking dashboard is icing on the cake, but the cake itself is the ability for people relying on the dashboard to quickly grasp and use the information it contains. For this reason, the focus during the development of the dashboard's "presentation layer" should be on how well it communicates data visually.

Dashboards accomplish this through "data visualization" or using graphical ways (bar charts, pie charts, trend lines, gauges) to display information. Your data "can also take other symbolic or graphical forms." ("How Data Visualization Helps Enhance the Value of Business Intelligence," DataFactz blog, August 2014) For example, if you use a real-time traffic application, you're seeing the visualization of traffic data coming from various sources, which allows you to decide the route to take to avoid delays or figure out how long your drive to a meeting might be. The use of another type of data visualization, infographics, is growing rapidly because of its ability to communicate quickly to time-pressed, information-burdened readers. Visualization of your fundraising data on a dashboard should communicate in similar ways.

Another visual consideration in user-friendly dashboard design relates to ergonomics: how the design of workplace environmental factors helps or hinders people's work. The most effective fundraising dashboards generally are simple, clean and allow people to get the information that matters most to them within a single screen view.

In this part of the dashboard creation process, you'll likely need support from someone who specializes in designing dashboards. She or he will be able to apply some of the powerful technology available today to help you develop the types of visualizations that will most successfully reveal the underlying data.

5. Make the data interactive and usable

One of the key characteristics of effective dashboards is interactivity. Your thoughtfully created fundraising dashboard gives you the information you need at a glance. When people want to know more, and they will, the dashboard should let them easily dig deeper into the data.

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For instance, if you have a panel giving the total amount of major gifts for the month, you should be able to click that panel and go directly to a table listing the gifts, their donors and other relevant information. Interactivity also means allowing people to customize their dashboards to meet their needs. Perhaps a front-line fundraiser only wants to see her donors' information in one particular panel, but the manager of donor services wants to see every donor's information. A filter will allow each to create the view s/he wants. Interactivity like this helps people quickly get exactly the information they need to get their jobs done.

Having usable data (or data you can act on) in your dashboard is a key way that any dashboard increases efficiency. Knowing that your car's inside temperature is 78 degrees does you no good unless you can actually do something about it, like crank up the A/C. The same principle applies to your fundraising dashboard. You see information without manually having to monitor it, you understand its import and then you do something about it, preferably without leaving your system.

Some kinds of data are appropriate for "exception" and "alert" reporting to enable action. Exception and alert reporting lets people specify which important occurrences will trigger a notification. Your annual fund manager might set up an automatic trigger that notifies her if an appeal's response falls below a certain level within a certain timeframe. These notifications can be as flashy as a bright-red blinking button or as

simple as an email. Ideally, the exception or alert report should allow you to take whichever action is necessary without level your application. For instance, one of your membership manager's important measures might be the inventory level of premiums. If he sees a notification that the inventory of t-shirts is dipping below a certain level, he can simply click a "re-order" button right on his dashboard.

6. Provide current, relevant data

Perhaps most important among the key characteristics of dashboards are those related to the strength of the underlying data. Words like "real-time," "informed," "relevant" and "current" all reflect the need for the dashboard's data to represent reality and for any measurements or KPIs to relate to actual challenges that your nonprofit faces.

The baseline function of your fundraising dashboard is to support the work of your fundraising team, so it needs to provide meaningful, useful data. If you completed your strategic due diligence in the creation of your dashboard, the information it provides should, indeed, be germane to people's work. Laser-focused precision in identifying the key measures the dashboard needs to track should also prevent dashboard clutter and allow the significant information to jump out at whoever is viewing it.

The ability to change and update the measurements represented in your dashboard is important, too. This year, the number of new donors might be your most important KPI. Next quarter, as you begin to understand the value of the dashboard and its supporting data, you might decide to focus on donor retention or lifetime value, and your dashboard panels should present that information.

The danger in dashboards that contain out-of-date or inaccurate information is probably obvious: You believe you're making decisions based on facts, but the data do not represent the current situation. Decisions you make based on this data may well be flawed. As well, people lose confidence in a dashboard with untimely or inaccurate data and, thus, won't use it.

Making sure your dashboard refreshes its underlying data at reasonable intervals helps with issues related to timeliness, of course. You also should be sure to test and validate the dashboard's supporting data to ensure its accuracy.

Arguably, the most important factors influencing your dashboard's timeliness and accuracy are connected to the databases from which your panels pull data. For instance, database designers speak about "data structure," which is related to how your database was originally designed and affects how well your dashboard panels can access and work with the information in the database.

__About the author__: Robert Girardi has more than 35 years' experience in software development. His expertise is in the architecture and design of business application information systems, having led the design and development of several such systems. Currently president and CEO of SofTrek Corporation, developer of ClearView CRM, Bob formerly was the global brand leader of Global Services for IBM, among other roles.

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