

# Using Data to Lead: Creating a Leadership Team Dashboard

Tuesday, October 18, 2022  
1 - 2 pm ET / 10 - 11 am PT



## Bridgespan Hosts



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## Guest Speaker



**Tara Peterson**  
Chief Executive Officer YWCA  
Glendale and Pasadena

# Sharing research, insights, and practical tools is core to our theory of change

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**200+**

Major articles & reports

**1,000+**

Short pieces & tools

# About The Bridgespan Group

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The Bridgespan Group is a global nonprofit organization that collaborates with mission-driven leaders, organizations, and philanthropists, **to make the world more equitable and just.**

# Bridgespan Leadership Accelerator programs

Leadership  
Development

## Achieving Strategic Clarity



Get clarity on your organization's impact goals and programs

## Investing in Future Leaders



Create a strategic and equitable approach for developing your talent

## Creating an Adaptive Plan



Create a dynamic plan to navigate uncertainty with confidence

## Strengthening the Executive Team



Unlock your team's full potential

Also available in India, South Asia, and South-East Asia through  
**Bridgespan's Nonprofit Development Program (BNDP)**

# Performance measurement is, first and foremost, for an organization's own learning and improvement

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**“What information do we need to make decisions that maximize our impact and effectiveness?”**

“Measurement will help us learn and **continuously improve** what we do.”



“Measurement will help us **build evidence**, attracting the resources we need to grow and informing policy and practice.”

“Measurement will give us the stories and data we need to **inspire** our staff, partners, and prospective funders.”

“We have to measure to **comply** with funder and regulator requirements.”



## Springtown Diabetes Care (SDC)

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### Mission:

To improve the quality of life of people in Springtown living with diabetes and to reduce the numbers of new community members acquiring the disease

### Programs:

- **Direct service:** patient navigation services to help Springtown diabetics get access to resources and care
- **Awareness-building:** provide information about diabetes prevention, diagnosis, and management
- **Fundraising for research:** 80% of funds raised support national research efforts (20% to local operations)

**\$6M, 40 employees**

## SDC wants to build an executive team dashboard

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What should a good dashboard enable SDC's executive team to do?

Use the Zoom chat function to submit your response



# As the executive team, using data helps you do three important things to lead the organization

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## **Align** on what matters most

- > Priorities-first (vs. metrics-first)

## **Assess** progress regularly

- > Vital few indicator lights
- > Using short- and long-term targets

## **Act** and follow up

- > Dig deeper when data signals concern
- > Follow up to ensure results



# Springtown Diabetes Care's 2018 Executive Dashboard

	<b>Metric</b>	<b>Annual Target</b>	<b>Actual CY 2018</b>
<b>Programs</b>	# navigation clients	450	437
	# new navigation clients	200	300
	% Springtonians with diabetes who were an SDC navigation client	15%	9%
	% SDC navigation clients who are Black men	25%	12%
	Average # navigation meetings / client	4	1.7
	% clients who would recommend SDC's patient navigation to others	90%	92%
	% clients reporting improvement one year after receiving SDC's patient navigation support	100%	45%
	# "Diabetes Aware" info table events	40	34
	# info-sharing partnerships	3	5
	# of pamphlets distributed	1000	856
	# fundraising events held	12	12
	# volunteers	100	57
	# volunteer service hours	800	690
<b>Finances</b>	% variance from annual operating budget	0%	-7%
	# months of ongoing expenses covered by unrestricted net assets	6	2
	Admin as a % of direct cost	15%	18%
	Total fundraising revenue	\$6,000,000	\$5,873,627
	Average funds raised/event	\$300,000	\$287,000
	ROI of fundraising activities (fundraising rev / direct fundraising costs)	15%	23%
	# individual donors	4750	3033
	Average gift/donor	\$500	\$810
% board meeting give/get targets	100%	75%	
<b>Operations</b>	% staff turnover	<20%	15%
	# months average staff tenure	7.6	5
	# open positions	4	2
	% staff with individualized development plans	100%	100%
	% staff that are people of color	50%	35%
	% staff with personal experience managing diabetes	30%	50%
	% server uptime	99.999%	99.996%
	# safety incidents reported	<12	4
	# media mentions of SDC	50	32
	# website visits and social media followers	35,000	36,700

# Align on what matters most: Take a priorities-first (vs. a metrics-first) approach to tracking data

Align

Organizational priorities are the short list of the ~10 most critical areas of focus **most necessary for an organization's success**:

<b>Impact</b>	Achieving impact objectives	“Increase number of clients served”
<b>Programs &amp; Operations</b>	Delivering quality programs	“Achieve high client satisfaction for all programs”
	Cultivating external relationships	“Engage and empower the community in self advocacy”
	Operating efficiently	“Ensure safe operations”
<b>Talent</b>	Developing a diverse, high-quality workforce	“Strengthen our leadership pipeline”
	Leading organizational culture and morale	“Provide a positive and inclusive working environment”
<b>Finances</b>	Allocating resources and managing expenses	“Meet budget expectations”
	Generating sufficient and sustainable revenue	“Grow fundraising revenue by 10%”
<b>Governance</b>	Maintaining an engaged, representative board	“Build a board that reflects our community”

**These are examples: you don't need something in every category.  
(Or you may have more than one!) Tailor the list to your most critical priorities.**

# Assess progress regularly: Executive team metrics should be the “vital few” to signal whether a priority is on track

Assess

## Key characteristics of executive dashboard metrics



Serve as  
“indicator lights”

What will give you **just enough information to track progress** and signal when you need to dig deeper?



Provide information  
**timely** enough  
to act on

What will provide data **frequently enough to be able to course correct** if needed?



Are **reasonable**  
**to measure**

Is the **“juice is worth the squeeze”**? (i.e., Is the effort to measure worth the information you get?)

# Assess progress regularly: Setting two types of targets helps determine your progress

Assess



## Long-term Ambition

What does “great” look like?  
In an ideal world, what is possible?



Helps ground you in what you are trying to achieve



## Short-term Target

If we perform at our best, what realistic but ambitious target could we achieve next year?



Helps you hold yourself accountable of progress

# An example of an executive team dashboard that homes in on the most critical issues fast

	SDC's Priorities	Metrics	Annual Target	Actual CY2018
Impact	Help Springtonians with diabetes to get access to resources and care	% Springtonians with diabetes who were an SDC navigation client	15%	9%
		% SDC navigation clients who are Black men	25%	12%
		Average # navigation meetings / client	4	1.7
		% clients who would recommend SDC's navigation to others	90%	92%
		% clients reporting improvement one year after SDC support	100%	45%
	Increase Springtonians' understanding of diabetes prevention, diagnosis, treatment	# "Diabetes Aware" info table events	40	34
		# info-sharing partnerships	3	5
Program & Operations	Run effective and efficient operations	Admin as a % of direct cost	15%	18%
		# volunteer service hours	800	690
Talent	Recruit and retain high-performing staff	% staff turnover	<20%	15%
		# open positions	4	2
		% staff that are people of color	50%	35%
Finances	Maintain a balanced budget	% variance from annual operating budget	0%	-7%
		# months of ongoing expenses covered by unrestricted net assets	6	2
	Raise local funds to support local operations and national diabetes research	Total fundraising revenue	\$6,000,000	\$5,873,627
		Average funds raised/event	\$300,000	\$287,000
		# individual donors	4750	3033
	Average gift/donor	\$500	\$810	
Governance	Fully engage the board	% board meeting give/get targets	100%	75%

# Act and follow up: Data is only as useful as how you use it!

Act



**Dig deeper** when the data signals cause for concern

- What's the **root cause? What more do we need to know** to understand what's going on?



**Take action** to course correct

- What do we need to **do to improve?** Who should we engage to ensure success?



**Follow up** to ensure action is taken

- Did we **do something** to course correct? **Did it work?**

# Act and follow up: Effective practices for using the dashboard are just as important as the dashboard itself

Act

## Before review meetings

- Determine ahead of time **what will be discussed** during the review (usually reds / yellows)
- Do **enough pre-work** to enable meaningful team engagement
  - Dig deeper to understand why
  - Determine input needed
- All team members **review pre-work in advance** of the meeting

## During review meetings

- **Prioritize metrics / issues** that require full team engagement
  - Don't go metric by metric
- Focus the discussion on **getting to action: What do we need to do to get better?**
- **Capture next steps** (What? Who? When?)

## After review meetings

- **Follow through on** next steps
- Report progress **and flag any challenges** as quickly as possible
- **Summarize progress** on next steps at the beginning of the next dashboard review session
- Periodically check in on **how effectively the team is using the dashboard**

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**eliminating racism  
empowering women**

**ywca**

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**Tara Peterson**  
Executive Director

# Strategic Dashboard Approach

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- Clearly defined vision and goals
- Opportunity to refresh strategies and metrics/milestones
- Leveraging Senior Leaders
- Getting buy-in from Board of Directors

# Strategic Dashboard Implementation

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- Senior Leaders' roles and responsibilities
- Monthly executive dashboard check-ins
- Quarterly presentation to the board of directors
- Celebrate success, discuss challenges, and create plan for action

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