The Bridgespan Group
Collaborating to accelerate social impact

LEADERSHIP TEAM DASHBOARDS

PRIORITIES AND METRICS EXAMPLES

Updated: September 2025

Note to reader: In their work with us, nonprofit teams have identified several dashboard metrics that have been helpful in their work. Included in these materials are a sample of frequently selected metrics. We encourage you to use these materials as a starting place to spur your thinking.

For more information on Bridgespan's work, please see the Bridgespan Leading for Impact program or our Fundamentals of Nonprofit Strategy website, with its corresponding article "How to Build a Nonprofit Dashboard for Your Leadership Team," for more information.

This database provides example organizational priorities and associated metrics organized across common categories

Common categories of core functions to lead the organization

Impact	Achieving impact objectives
Programs, Services and Operations	Delivering quality programs/activities
	Building awareness and support
	Cultivating external relationships
	Operating efficiently
Talent	Developing a diverse, high-quality workforce
	Leading organizational culture and morale
Finances	Allocating resources and managing expenses
	Generating sufficient and sustainable revenue
Governance	Maintaining an engaged, representative board

Example organizational priorities by category (1/3)

Impact

ACHIEVING IMPACT OBJECTIVES

Direct service:

- Achieve target outcomes
- Increase clients directly served
- Deepen support of clients
- Increase geographic coverage

Policy/advocacy/influence:

- Achieve policy change outcomes
- Achieve progress benchmarks (e.g., bill introduced)
- Influence key stakeholders and/or communities
- Contribute to narrative change
- Strengthen organizations
- Build social capital and/or networks
- Increase investment in target areas

Example organizational priorities by category (2/3)

Programs, Services, and Operations

DELIVERING QUALITY PROGRAMS / ACTIVITIES

- Provide high-quality direct-service programs
- Meet contractual obligations
- Ensure alignment across program sites
- Effectively use data for continuous learning

BUILDING ISSUE AWARENESS & SUPPORT

- Engage and empower community in self-advocacy
- Conduct high-quality research to advance the field
- Maintain thought leadership and voice in the field
- Increase public engagement

CULTIVATING EXTERNAL RELATIONSHIPS

Organizational visibility and engagement

- Increase/protect organization's brand and awareness
- Strengthen community engagement
- Grow membership base

Partners and volunteers

- Grow high-quality partners
- Improve partner relationships
- Increase volunteers
- Retain volunteers

OPERATING EFFICIENTLY

- Efficient and effective operational supports for work
- Ensure safe operations
- Mitigate risks/ensure compliance

Example organizational priorities by category (3/3)

Talent

DEVELOPING A DIVERSE, HIGH-QUALITY WORKFORCE

- Recruit high-quality staff
- Retain high-quality staff
- Effectively develop staff
- Improve leadership diversity
- Improve staff diversity
- Strengthen organizational leadership

LEADING ORGANIZATIONAL CULTURE AND MORALE

- Support staff morale
- Provide positive and inclusive working environment
- Timely and effective internal communications

Finances

ALLOCATING RESOURCES AND MANAGING EXPENSES

- Maintain balanced budget
- Run financially efficient programs
- Align financial operations with strategic decisions
- Maintain operational reserve/financial liquidity

GENERATING SUFFICIENT AND SUSTAINABLE REVENUE

- Raise sufficient revenues
- Maintain/grow relationships with existing funders
- Grow donor base
- Increase/maintain unrestricted funds
- Increase revenue from major annual event
- Fundraise efficiently

Govern-ance

MAINTAINING AN ENGAGED, REPRESENTATIVE BOARD

- Improve board diversity
- Ensure active board engagement
- Ensure board fundraising effectiveness

Impact: Example priorities and metrics (1/2)

ACHIEVING IMPACT OBJECTIVES – POLICY/ADVOCACY/INFLUENCE

Common priorities	Potential metrics
Achieve target outcomes	• Clients achieving target outcomes (#, % change in, % target achieved)
	• % of target population achieving outcomes
Increase clients served	• Clients served (#, % change in, % target achieved)
	• % of target population served by organization
	• % of clients served who fall into target population
	• % of referrals who receive services
Deepen support of clients	• % of clients enrolled in more than one program
	• % of clients who complete program
	• % of clients in target population who complete program
	• Average length/frequency of client participation
	• % increase in constituent satisfaction with quality of supports
	• Difference in satisfaction between target population relative to others
Increase geographic coverage	• # of sites
	• # of new geographies/sites established

Impact: Example priorities and metrics (2/2)

ACHIEVING IMPACT OBJECTIVES – DIRECT SERVICE

Common priorities	Potential metrics
Achieve policy change outcomes	• # of favorable bills passed or institutional policies enacted
	• % of bills passed that advance specific equity goals
	• # of harmful bills blocked
Achieve progress benchmarks (e.g., bill introduced)	• # of favorable pieces of legislation introduced
	• # of sponsors signed onto bill
	• # of meetings with key public officials
	• # of times favored language is incorporated in targeted legislation
Influence key stakeholders and/or communities	• # of examples of behavior change in target communities
	• Changes in community norms
	• # of mentions of targeted issues in targeted media, indicating increased visibility
Contribute to narrative change	• # of examples of change in language and rhetoric around targeted issue
	• % change in perceptions and attitudes toward issue
Strengthen organizations	• # of hires that indicate improved advocacy capabilities of key organizational partners
	• Improved data analytics capacity
Build social capital and/or networks	• # of meetings taken and/or # of relationships with decision makers built
	• % of “primary” relationships that are with people/groups from traditionally marginalized voices
	• # of organizations working in collaboration in the space (e.g., coalitions)
Increase investment in target areas	• % increase in funding flowing to programs and advocacy efforts

Programs, Services, and Operations: Example priorities and metrics (1/5)

DELIVERING QUALITY PROGRAMS/ACTIVITIES

Common priorities	Potential metrics
Provide high-quality direct-service programs	• % of clients served attaining a positive outcome
	• % difference between client outcomes in a target population relative to the broader population or specific groups
	• % of programs meeting milestones/KPIs/goals
	• % of programs meeting quality or "best-in-class" targets
	• Client satisfaction (NPS, average score, % above target)
	• Utilization rate (e.g., units, beds, etc.) (% of asset actively used)
Meet contractual obligations	• % of contract obligations met
Ensure alignment across program sites	• Regularity of cross-site communication/meetings
Effectively use data for continuous learning	• Frequency of data use in review meetings
	• % of data entry completed on a monthly basis

Programs, Services, and Operations: Example priorities and metrics (2/5)

BUILDING ISSUE AWARENESS AND SUPPORT

Common priorities	Potential metrics
Engage and empower clients in self-advocacy	• # of clients participating in advocacy events/activities
	• % of participants who identify as a person of color
Conduct high-quality research to advance the field	• # of published (peer-reviewed) articles/reports
	• # of external citations of research
	• % of research pieces published that focus on communities of color
	• # of research grants secured
Maintain thought leadership and voice in field	• # of external presentations given by organization
	• % of external presentations given that include individuals with lived experience in/from the community we serve
	• # of articles/thought pieces published
Increase public engagement	• # of community members participating in public events
	• # of speaking engagements and/or quotes that indicate increased prominence of community leaders

Programs, Services, and Operations: Example priorities and metrics (3/5)

CULTIVATING EXTERNAL RELATIONSHIPS: ORG VISIBILITY & ENGAGEMENT

Common priorities	Potential metrics
Increase/protect organization's brand and awareness	• # of individualized, personal communications to key stakeholders
	• # of media outreach activities
	• # of organic organizational mentions in external media
	• # digital media engagements (e.g., website visits, social media activity)
Grow membership base	• Members (# or % change YoY)
	• % members from target demographic groups
	• Member satisfaction (NPS, average score)
	• Difference in member satisfaction between members of different demographic groups
	• Member retention (# of members who do not renew membership/total membership)
	• % of members attending organization events
Strengthen community engagement	• # of community engagement/outreach activities completed
	• # of community members participating in engagement meetings
	• # of outreach activities specifically targeted in communities of color
	• % of programs that have incorporated community input

Programs, Services, and Operations: Example priorities and metrics (4/5)

CULTIVATING EXTERNAL RELATIONSHIPS: PARTNERS AND VOLUNTEERS

Common priorities	Potential metrics
Grow high-quality partners	• % of providers in target geography that are certified/credentialed
	• Partners that have implemented model/program with fidelity (# or %)
Improve partner relationships	• % of partners rating service above average/positive
	• # of interactions with partners (e.g., targeted relationship building, "customer service")
	• # of partners led by people with lived experience in/from the community we serve
	• # of participants in partner training
	• % of participants rating training above average
	• % of training participants that identify as part of our target population
	• # of participants who make changes in practice based on training
Increase volunteers	• # of new volunteers
	• % of volunteers with lived experience in/from the community we serve
	• # of new volunteers trained
	• # of volunteer hours
	• % increase client satisfaction with volunteer quality (e.g., survey responses)
Retain volunteers	• # of volunteers
	• % of volunteers who return/participate in more than one event
	• Difference in retention rate between volunteers with lived experience in/from the community we serve
	• % of volunteers who express a positive experience

Programs, Services, and Operations: Example priorities and metrics (5/5)

OPERATING EFFICIENTLY

Common priorities	Potential metrics
Efficient and effective operational supports for work	• Facilities costs per square foot
	• % work orders that have been closed
	• Average time for work order completion
	• Budget-to-actuals for operations/maintenance
Ensure safe operations	• # of incidents per quarter
	• Employee reported perception of safety (overall response, % above target)
Mitigate risks/ensure compliance	• # of incident reports
	• % of tasks on compliance calendar completed each month

Talent: Example priorities and metrics (1/2)

DEVELOPING A DIVERSE, HIGH-QUALITY WORKFORCE

Common priorities	Potential metrics
Recruit high-quality staff	• % of employees who are former program participants
	• % open positions
	• Average # of days for open positions
Retain high-quality staff	• % staff who left in past X time period
	• % of staff with tenure greater than X years
	• % staff retention based on staff demographics
	• Average length of staff tenure
	• % of staff who left in the past year who had tenure less than one year
Effectively develop staff	• % of staff with individualized development plans
	• % of staff on track to meet development goals
	• % of staff reporting satisfaction in job training/development
	• # of supervisory check-ins focused on professional development
	• % staff attending external trainings
	• # of external trainings offered
Improve leadership diversity	• % of leadership with lived experience in/from the community we serve
	• % staff with lived experience in/from the community we serve hired or promoted into management positions
Improve staff diversity	• % of staff with lived experience in/from the community we serve
	• % of new staff with lived experience in/from the community we serve

Talent: Example priorities and metrics (2/2)

LEADING ORGANIZATIONAL CULTURE AND MORALE

Common priorities	Potential metrics
Support staff morale	• Performance on staff culture survey (overall response, % above target)
	• "Organizational overwhelm rate" (% of staff who worked more than 40 hours per week in the past month)
	• % difference in overwhelm rate by staff demographic
Provide a positive and inclusive working environment	• Employee satisfaction (NPS)
	• Difference in employee satisfaction staff demographics
	• Employee perception of inclusion (overall response, % above target)
Timely and effective internal communications	• % of staff reporting satisfaction about internal communications

Finances: Example priorities and metrics (1/2)

ALLOCATING RESOURCES AND MANAGING EXPENSES

Common priorities	Potential metrics
Maintain balanced budget	• Budget-to-actuals
	• % of programs meeting budget targets
Run financially efficient programs	• Program subsidy (program income + restricted revenue minus program cost + overhead allocation)
	• Profit margin (% change YoY)
	• % of subsidies provided based on community need/areas of historical disadvantage
	• % change in program costs (YoY, per participant)
Maintain operational reserve /financial liquidity	• # of days/months in cash reserves/unrestricted assets
	• % of target unrestricted general operation reserve achieved
	• Current assets vs. current liabilities (% of annual expenses held in working capital)
	• # months of ongoing expenses covered by estimated liquid unrestricted net assets (LUNA)
Align financial operations with strategic decisions	• Grants accepted that are not aligned with strategic goals or criteria (# or %)
	• % of funders with an expressed/explicit commitment to racial equity

Finances: Example priorities and metrics (2/2)

GENERATING SUFFICIENT AND SUSTAINABLE REVENUE

Common priorities	Potential metrics
Raise sufficient revenues	• % of funding target achieved
	• % of contracts won
Maintain strong and growing relationships with existing funders	• # of gifts over $X amount annually
	• % of total dollars from multiyear grants
	• # of repeat givers
	• % change in gift size YoY
	• # of direct interactions with priority funders each quarter
Grow donor base (can specify by category, e.g., foundation, individual, corporate)	• Total donors (# and % change YoY)
	• Total funds raised from donor group (# and % change YoY)
	• Giving from donor groups as % of total revenue (& change YoY)
	• % change in average gift size YoY
	• New donors retained (# or %)
	• Donors by giving range (e.g., $1K+) (# or %)
	• # of targeted donor engagement events/participation
Increase/maintain unrestricted funds	• Amount of general operating/unrestricted funds
	• % of target for general operating funds
Increase revenue from major annual event	• Net amount raised at event (e.g., gala, luncheon, fundraising week)
	• % change in net event revenue YoY
Fundraise efficiently	• Return on investment (fundraising revenue/fundraising costs)
	• Conversion rate of donor outreach (e.g., $ raised/# of meetings)

Governance: Example priorities and metrics (1/1)

MAINTAINING AN ENGAGED, REPRESENTATIVE BOARD

Common priorities	Potential metrics
Improve board diversity	• % of board who represent different backgrounds and experiences
Ensure active board engagement	• Average attendance of board meetings in past X time period
	• % of board members active on committees
	• % of board members participating in events/activities each quarter
Board serves as effective fundraisers	• % of board members meeting give/get targets
	• % progress made towards annual board contribution goals

It may be helpful to use a mix of different types of metrics to fully track progress against priorities

Metric type	Definition	When to use	Examples
Outcome	Measure of **impact achieved**	To ensure impact objectives are achieved Outcomes data may not be available frequently enough to be helpful in regular decision making; may need to consider other measures	• *# of students graduating college* • *# of laws passed*
Output	Measure of **activities** undertaken to achieve impact	When a priority lacks an evidence base, takes a long time to outcomes, or is difficult to measure To ensure organizational performance or adherence to contracts/commitments	• *Average # of mentorship hours/student* • *# of interactions with local policymakers*
Leading	Measure that might **predict future success**	Provides information along the way to track progress; most dashboard metrics should be leading indicators to enable time to course correct	• *# of credits achieved each quarter (as lead to college graduation)* • *# of staff attending training (as lead to improved efficiency)*
Lagging	Measure that **reflects past performance**	Used to confirm an outcome; typically follow an event	• *Average weight of clients post-program* • *Mortality rates after prenatal program*
Quantitative	Measure expressed as an **objective number**	Provides a clear understanding of the current state	• *# of absences per month* • *% of housing units that filled each month*
Qualitative	Measure expressed as a **subjective descriptor**	Can be useful if quantitative measures are not available	• *Key themes from client feedback* • *Executive team "gut check"*
Roll-up	Measure that aggregates performance across a **range of sub-indicators**	Allow for quick understanding of complex topics but can also mask variance; often weighted to prioritize the most critical information	• *Board engagement (combining metrics of attendance and giving)* • *Partnership health (combining interactions and contract size)*