

# LEADERSHIP TEAM DASHBOARDS PRIORITIES AND METRICS EXAMPLES

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**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](#) and "[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

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## *Common categories of core functions to lead the organization*

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

# Example organizational priorities by category (1/3)

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## 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)

## 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 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

## Governance

### 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
<b>Achieve target outcomes</b>	<ul style="list-style-type: none"> <li>• Clients achieving target outcomes (#, % change in, % target achieved)</li> <li>• % of target population (e.g., BIPOC, specific demographic group) achieving target outcomes</li> </ul>
<b>Increase clients served</b>	<ul style="list-style-type: none"> <li>• Clients served (#, % change in, % target achieved)</li> <li>• % of target population served by organization</li> <li>• % of clients served who fall into target population</li> <li>• % of referrals who receive services</li> </ul>
<b>Deepen support of clients</b>	<ul style="list-style-type: none"> <li>• % of clients enrolled in more than one program</li> <li>• % of clients who complete program</li> <li>• % of clients in target population (e.g., BIPOC, specific demographic group) who complete the program</li> <li>• Average length/frequency of client participation</li> <li>• % increase in constituent satisfaction with quality of the supports</li> <li>• Difference in satisfaction between target population relative to others</li> </ul>
<b>Increase geographic coverage</b>	<ul style="list-style-type: none"> <li>• # of sites</li> <li>• # of new geographies/sites established</li> </ul>

# Impact: example priorities and metrics (2/2)

## ACHIEVING IMPACT OBJECTIVES – DIRECT SERVICE

Common priorities	Potential metrics
<b>Achieve policy change outcomes</b>	<ul style="list-style-type: none"> <li>• # of favorable bills passed or institutional policies enacted</li> <li>• % of bills passed that advance specific equity goals</li> <li>• # of harmful bills blocked</li> </ul>
<b>Achieve progress benchmarks (e.g., bill introduced)</b>	<ul style="list-style-type: none"> <li>• # of favorable pieces of legislation introduced</li> <li>• # of sponsors signed onto bill</li> <li>• # of meetings with key public officials</li> <li>• # of times favored language is incorporated in targeted legislation</li> </ul>
<b>Influence key stakeholders and/or communities</b>	<ul style="list-style-type: none"> <li>• # of examples of behavior change in target communities</li> <li>• Changes in community norms</li> <li>• # of mentions of targeted issues in targeted media, indicating increased visibility</li> </ul>
<b>Contribute to narrative change</b>	<ul style="list-style-type: none"> <li>• # of examples of change in language and rhetoric around targeted issue</li> <li>• % change in perceptions and attitudes toward issue</li> </ul>
<b>Strengthen organizations</b>	<ul style="list-style-type: none"> <li>• # of hires that indicate improved advocacy capabilities of key organizational partners</li> <li>• Improved data analytics capacity</li> </ul>
<b>Build social capital and/or networks</b>	<ul style="list-style-type: none"> <li>• # of meetings taken and/or # of relationships with decision makers built</li> <li>• % of “primary” relationships that are with people/groups from traditionally marginalized voices</li> <li>• # of organizations working in collaboration in the space (e.g., coalitions)</li> </ul>
<b>Increase investment in target areas</b>	<ul style="list-style-type: none"> <li>• % increase in funding flowing to programs and advocacy efforts</li> <li>• \$\$ directed to BIPOC-led organizations</li> </ul>

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

## DELIVERING QUALITY PROGRAMS / ACTIVITIES

Common priorities	Potential metrics
<b>Provide high-quality direct-service programs</b>	<ul style="list-style-type: none"><li>• % of clients served attaining a positive outcome</li><li>• % difference between client outcomes in a target population relative to the broader population or specific groups</li><li>• % of programs meeting milestones/KPIs/goals</li><li>• % of programs meeting quality or “best-in-class” targets</li><li>• Client satisfaction (NPS score, average score, % above target)</li><li>• Utilization rate (e.g., units, beds, etc.) (% of asset actively used)</li></ul>
<b>Meet contractual obligations</b>	<ul style="list-style-type: none"><li>• % of contract obligations met</li></ul>
<b>Ensure alignment across program sites</b>	<ul style="list-style-type: none"><li>• Regularity of cross-site communication / meetings</li></ul>
<b>Effectively use data for continuous learning</b>	<ul style="list-style-type: none"><li>• Frequency of data use in review meetings</li><li>• % of data entry completed on a monthly basis</li></ul>



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

## BUILDING ISSUE AWARENESS AND SUPPORT

Common priorities	Potential metrics
<b>Engage and empower clients in self-advocacy</b>	<ul style="list-style-type: none"> <li>• # of clients participating in advocacy events/activities</li> <li>• % of participants who identify as a person of color</li> </ul>
<b>Conduct high-quality research to advance the field</b>	<ul style="list-style-type: none"> <li>• # of published (peer-reviewed) articles/reports</li> <li>• # of external citations of research</li> <li>• % of research pieces published that focus on communities of color</li> <li>• # of research grants secured</li> </ul>
<b>Maintain thought leadership and voice in field</b>	<ul style="list-style-type: none"> <li>• # of external presentations given by organization</li> <li>• % of authors/speakers included that identify as a person of color</li> <li>• # of articles/thought pieces published</li> </ul>
<b>Increase public engagement</b>	<ul style="list-style-type: none"> <li>• # of community members participating in public events</li> <li>• # of speaking engagements and/or quotes that indicate increased prominence of community leaders</li> </ul>

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

## CULTIVATING EXTERNAL RELATIONSHIPS: ORG VISIBILITY & ENGAGEMENT

Common priorities	Potential metrics
<b>Increase/protect organization's brand and awareness</b>	<ul style="list-style-type: none"> <li>• # of individualized, personal communications to key stakeholders</li> <li>• # of media outreach activities</li> <li>• # of organic organizational mentions in external media</li> <li>• # digital media engagements (e.g., website visits, social media activity)</li> </ul>
<b>Grow membership base</b>	<ul style="list-style-type: none"> <li>• Members (# or % change YoY)</li> <li>• % members from target demographic groups</li> <li>• Member satisfaction (NPS score, average score)</li> <li>• Difference in member satisfaction between members of different demographic groups</li> <li>• Member retention (# of members who do not renew membership/total membership)</li> <li>• % of members attending organization events</li> </ul>
<b>Strengthen community engagement</b>	<ul style="list-style-type: none"> <li>• # of community engagement/outreach activities completed</li> <li>• # of community members participating in engagement meetings</li> <li>• # of outreach activities specifically targeted in communities of color</li> <li>• % of programs that have incorporated community input</li> </ul>

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

## CULTIVATING EXTERNAL RELATIONSHIPS: PARTNERS AND VOLUNTEERS

Common priorities	Potential metrics
<b>Grow high-quality partners</b>	<ul style="list-style-type: none"> <li>• % of providers in target geography that are certified/credentialed</li> <li>• Difference in presence of certified providers in white communities vs. communities of color</li> <li>• Partners that have implemented model/program with fidelity (# or %)</li> </ul>
<b>Improve partner relationships</b>	<ul style="list-style-type: none"> <li>• % of partners rating service above average/positive</li> <li>• # of interactions with partners (e.g., targeted relationship building, “customer service”)</li> <li>• # of partners led by people of color/community members</li> <li>• # of participants in partner training</li> <li>• % of participants rating training above average</li> <li>• % of training participants that identify as people of color</li> <li>• # of participants who make changes in practice based on training</li> </ul>
<b>Increase volunteers</b>	<ul style="list-style-type: none"> <li>• # of new volunteers</li> <li>• % of volunteers who are from the communities served</li> <li>• # of new volunteers trained</li> <li>• # of volunteer hours</li> <li>• % increase client satisfaction with volunteer quality (e.g., survey responses)</li> </ul>
<b>Retain volunteers</b>	<ul style="list-style-type: none"> <li>• # of volunteers</li> <li>• % of volunteers who return/participate in more than one event</li> <li>• Difference in retention rate between volunteers of different demographic backgrounds</li> <li>• % of volunteers who express a positive experience</li> </ul>

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

## OPERATING EFFICIENTLY

Common priorities	Potential metrics
<b>Efficient and effective operational supports for work</b>	<ul style="list-style-type: none"><li>• Facilities costs per square foot</li><li>• % work orders that have been closed</li><li>• Average time for work order completion</li><li>• Budget-to-actuals for operations/maintenance</li></ul>
<b>Ensure safe operations</b>	<ul style="list-style-type: none"><li>• # of incidents per quarter</li><li>• Employee reported perception of safety (overall response, % above target)</li></ul>
<b>Mitigate risks/ensure compliance</b>	<ul style="list-style-type: none"><li>• # of incident reports</li><li>• % of tasks on compliance calendar completed each month</li></ul>

# Talent: example priorities and metrics (1/2)

## DEVELOPING A DIVERSE, HIGH-QUALITY WORKFORCE

Common priorities	Potential metrics
<b>Recruit high-quality staff</b>	<ul style="list-style-type: none"> <li>• % of employees who are former program participants</li> <li>• % open positions</li> <li>• % BIPOC candidates vs. % BIPOC hires</li> <li>• Average # of days for open positions</li> </ul>
<b>Retain high-quality staff</b>	<ul style="list-style-type: none"> <li>• % staff who left in past X time period</li> <li>• % of staff with tenure greater than X years</li> <li>• % staff retention based on staff demographics</li> <li>• Average length of staff tenure</li> <li>• % of staff who left in the past year who had tenure less than one year</li> </ul>
<b>Effectively develop staff</b>	<ul style="list-style-type: none"> <li>• % of staff with individualized development plans</li> <li>• % of staff on track to meet development goals</li> <li>• % of staff reporting satisfaction in job training/development</li> <li>• # of supervisory check-ins focused on professional development</li> <li>• % staff attending external trainings</li> <li>• # of external trainings offered</li> </ul>
<b>Improve leadership diversity</b>	<ul style="list-style-type: none"> <li>• % of leadership who are people of color</li> <li>• % staff of color hired or promoted into management positions</li> </ul>
<b>Improve staff diversity</b>	<ul style="list-style-type: none"> <li>• % of staff who are people of color (or specific/other demographic)</li> <li>• % of new staff who are people of color (or specific demographic)</li> <li>• % of staff from the community we serve</li> <li>• Difference between % of clients and % of staff who are people of color (or specific/other demographic)</li> </ul>
<b>Strengthen leadership</b>	<ul style="list-style-type: none"> <li>• % of leadership who are former program participants</li> </ul>

# Talent: example priorities and metrics (2/2)

## LEADING ORGANIZATIONAL CULTURE AND MORALE

Common priorities	Potential metrics
<b>Support staff morale</b>	<ul style="list-style-type: none"><li>• Performance on staff culture survey (overall response, % above target)</li><li>• “Organizational overwhelm rate” (% of staff who worked more than 40 hours per week in the past month)</li><li>• % difference in overwhelm rate by staff demographic</li></ul>
<b>Provide a positive and inclusive working environment</b>	<ul style="list-style-type: none"><li>• Employee satisfaction (net promoter score)</li><li>• Difference in employee satisfaction staff demographics</li><li>• Employee perception of inclusion (overall response, % above target)</li></ul>
<b>Timely and effective internal communications</b>	<ul style="list-style-type: none"><li>• % of staff reporting satisfaction about internal communications</li></ul>

# Finances: example priorities and metrics (1/2)

## ALLOCATING RESOURCES AND MANAGING EXPENSES

Common priorities	Potential metrics
<b>Maintain balanced budget</b>	<ul style="list-style-type: none"> <li>Budget-to-actuals</li> <li>% of programs meeting budget targets</li> </ul>
<b>Run financially efficient programs</b>	<ul style="list-style-type: none"> <li>Program subsidy (program income + restricted revenue minus program cost + overhead allocation)</li> <li>Profit margin (% change YoY)</li> <li>% of subsidies provided based on community need/areas of historical disadvantage</li> <li>% change in program costs (YoY, per participant)</li> </ul>
<b>Maintain operational reserve / financial liquidity</b>	<ul style="list-style-type: none"> <li># of days/months in cash reserves/unrestricted assets</li> <li>% of target unrestricted general operation reserve achieved</li> <li>Current assets vs. current liabilities (% of annual expenses held in working capital)</li> <li># months of ongoing expenses covered by estimated liquid unrestricted net assets (LUNA)</li> </ul>
<b>Align financial operations with strategic decisions</b>	<ul style="list-style-type: none"> <li>Grants accepted that are not aligned with strategic goals or criteria (# or %)</li> <li>% of funders with an expressed/explicit commitment to racial equity</li> </ul>

# Finances: example priorities and metrics (2/2)

## GENERATING SUFFICIENT AND SUSTAINABLE REVENUE

Common priorities	Potential metrics
<b>Raise sufficient revenues</b>	<ul style="list-style-type: none"> <li>• % of funding target achieved</li> <li>• % of contracts won</li> </ul>
<b>Maintain strong and growing relationships with existing funders</b>	<ul style="list-style-type: none"> <li>• # of gifts over \$X amount annually</li> <li>• % of total dollars from multiyear grants</li> <li>• # of repeat givers</li> <li>• % change in gift size YoY</li> <li>• # of direct interactions with priority funders each quarter</li> </ul>
<b>Grow donor base</b> (can specify by category, e.g., foundation, individual, corporate)	<ul style="list-style-type: none"> <li>• Total donors (# and % change YoY)</li> <li>• Total funds raised from donor group (# and % change YoY)</li> <li>• Giving from donor groups as % of total revenue (&amp; change YoY)</li> <li>• % change in average gift size YoY</li> <li>• New donors retained (# or %)</li> <li>• Donors by giving range (e.g., \$1K+) (# or %)</li> <li>• # of targeted donor engagement events/participation</li> </ul>
<b>Increase / maintain unrestricted funds</b>	<ul style="list-style-type: none"> <li>• Amount of general operating/unrestricted funds</li> <li>• % of target for general operating funds</li> </ul>
<b>Increase revenue from major annual event</b>	<ul style="list-style-type: none"> <li>• Net amount raised at event (e.g., gala, luncheon, fundraising week)</li> <li>• % change in net event revenue YoY</li> </ul>
<b>Fundraise efficiently</b>	<ul style="list-style-type: none"> <li>• Return on investment (fundraising revenue/fundraising costs)</li> <li>• Conversion rate of donor outreach (e.g., \$ raised/# of meetings)</li> </ul>



# Governance: example priorities and metrics (1/1)

## MAINTAINING AN ENGAGED, REPRESENTATIVE BOARD

Common priorities	Potential metrics
<b>Improve board diversity</b>	<ul style="list-style-type: none"><li>• % of board who are people of color (or specific/other demographic)</li><li>• Difference between % of clients and board who are people of color (or specific/other demographic)</li></ul>
<b>Ensure active board engagement</b>	<ul style="list-style-type: none"><li>• Average attendance of board meetings in past X time period</li><li>• % of board members active on committees</li><li>• % of board members participating in events/activities each quarter</li></ul>
<b>Board serves as effective fundraisers</b>	<ul style="list-style-type: none"><li>• % of board members meeting give/get targets</li><li>• % progress made towards annual board contribution goals</li></ul>

# 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
<b>Outcome</b>	Measure of <b>impact achieved</b>	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	<ul style="list-style-type: none"> <li>• <i># of students graduating college</i></li> <li>• <i># of laws passed</i></li> </ul>
<b>Output</b>	Measure of <b>activities</b> 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	<ul style="list-style-type: none"> <li>• <i>Average # of mentorship hours/student</i></li> <li>• <i># of interactions with local policymakers</i></li> </ul>
<b>Leading</b>	Measure that might <b>predict future success</b>	Provides information along the way to track progress; most dashboard metrics should be leading indicators to enable time to course correct	<ul style="list-style-type: none"> <li>• <i># of credits achieved each quarter (as lead to college graduation)</i></li> <li>• <i># of staff attending training (as lead to improved efficiency)</i></li> </ul>
<b>Lagging</b>	Measure that <b>reflects past performance</b>	Used to confirm an outcome; typically follow an event	<ul style="list-style-type: none"> <li>• <i>Average weight of clients post-program</i></li> <li>• <i>Mortality rates after prenatal program</i></li> </ul>
<b>Quantitative</b>	Measure expressed as an <b>objective number</b>	Provides a clear understanding of the current state	<ul style="list-style-type: none"> <li>• <i># of absences per month</i></li> <li>• <i>% of housing units that filled each month</i></li> </ul>
<b>Qualitative</b>	Measure expressed as a <b>subjective descriptor</b>	Can be useful if quantitative measures are not available	<ul style="list-style-type: none"> <li>• <i>Key themes from client feedback</i></li> <li>• <i>Executive team “gut check”</i></li> </ul>
<b>Roll-up</b>	Measure that aggregates performance across a <b>range of sub-indicators</b>	Allow for quick understanding of complex topics but can also mask variance; often weighted to prioritize the most critical information	<ul style="list-style-type: none"> <li>• <i>Board engagement (combining metrics of attendance and giving)</i></li> <li>• <i>Partnership health (combining interactions and contract size)</i></li> </ul>