

## **Humanities Washington's dashboard helps track its progress**

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Humanities Washington's board, like the boards of many not-for-profit organizations, continually seeks ways to improve upon its programs and processes. How do we ensure the most effective stewardship possible of the resources granted to us and make the most significant impact with our audiences along the way?

Out of our 2012 Strategic Planning process came several new evaluation tools at the program and organizational level. As a staff we wondered how to most effectively present this information to our board. We wanted them to be able to see trends, and quickly see the areas in which we were succeeding and those areas that deserved extra attention. We consider our trustees partners in this, and as we developed the strategic plan, implementation plan and dashboard, trustees encouraged us to hold *them* accountable for key metrics as well (such as trustee's charitable giving to the organization and outreach).

The end result was a strategic dashboard that would be updated thrice yearly before each board meeting. Our dashboard is divided into five sections which parallel our five strategies (e.g. reach a broader audience that more closely reflects the diversity of the state of Washington). In each section, we track several items. In "long-term viability," for example, we track several fundraising metrics including donor retention and growth in our donor pool. In "enhance the strength of Washington's cultural network" we measure how many organizations engage in partnerships with other local nonprofits on a project in addition to Humanities Washington.

The Dashboard is a work in progress and isn't perfect. Because it is meant to be a snapshot, we cannot include every measure we'd like. Instead, we worked with trustees to identify what metrics would give them the best indication of our progress in each strategic area. Also, we continually ask ourselves if we are measuring the "right" things. If something comes up that surprises us, but the dashboard didn't address, we ask if it should be added. With each iteration of the dashboard the data becomes more significant as we have a larger pool of data from which to identify trends.

In the short time we've been using the dashboard, we've found it helpful to guide board and committee decision-making about resource allocation, etc. For example, in the measure of diversity, specifically related to our board, it has helped us to define what we mean by diversity. (Answer, for HW, it is a combination of geographic, racial and professional affiliation. Age is also desirable, but doesn't make the board's "top three." It has also helped our board to zero in on some of the most important components of our development plan (donor retention and growth in individual giving).

A work in progress, but necessary to the progress of our work.

## A Sample of Humanities Washington's Dashboard

| <b>DIVERSITY INDEX</b>   |  |  |   |  |  |  | Goal | Actual |
|--|--|--|---|--|--|--|------|--------|
| Reach a broader audience that more closely reflects the diversity of Washington state. |  |  |   |  |  |  |      |        |
|  |  |  | Y | % of partners indicated HW programs helped them to diversify their audiences (per event) |  |  | 50%  | 43%    |
|  |  |  | R | HW board diversity index (geographic + professional + ethnic) (0-9 scale)                |  |  | 8    | 5.5    |

| <b>VIABILITY INDEX</b>                                |  |  |     |  |  |  | Goal | Actual |
|---|--|--|-----|--|--|--|------|--------|
| Build HW's internal capacity and long-term viability. |  |  |     |  |  |  |      |        |
| <b>REVENUE - private funding</b>                      |  |  |     |  |  |  |      |        |
|   |  |  | G   | % to goal in non-Bedtime Stories individual giving; including trustee giving (\$55,000)                                |  |  | 100% | 61%    |
|   |  |  | G   | % to goal in non-Bedtime Stories corporate/foundation giving (\$137,700)   |  |  | 100% | 79%    |
|   |  |  | Y   | % to Bedtime Stories goal (\$170,000)  |  |  | 100% | 70%    |
|   |  |  | G   | % donor retention year-over-year (updated annually; actual is 2012 vs. 2011)   |  |  | 45%  | 47%    |
|   |  |  | Y   | # of new donors  |  |  | 80   | TBD    |
| <b>PEOPLE POWER - board</b>                           |  |  |     |  |  |  |      |        |
|   |  |  | G   | % of trustees attending three of HW's annual four board meetings (updated annually; actual is from calendar year 2012) |  |  | 75%  | 81%    |
|   |  |  | n/a | level of trustee non-donor advocacy (representing HW at programs, Congressional outreach, etc.)                        |  |  | TBD  | TBD    |
|   |  |  | G   | % of trustees making a personally meaningful financial contribution to HW  |  |  | 100% | 100%   |
| <b>FINANCIAL BEDROCK</b>                              |  |  |     |  |  |  |      |        |
|   |  |  | G   | # of months operating expenses available in reserves (as of 9/30/13)   |  |  | 6.0  | 5.4    |
|   |  |  | G   | administrative and fundraising expense ratio (Form 990)  |  |  | 25%  | 25%    |