

XYZ Organization
2010 Dashboard

Key	Red	Act Now
	Yellow	Monitor
	Green	Celebrate

Performance Indicators	Targets	Current Indicator	Trend			Comments
			3 mos ago	6 mos ago	9 mos ago	
Fundraising						
New major donors	5 or more	3		2		Mesaured against how many we want for the year. Donors who give more than \$1,000
Major donors introduced by a board member	5 or more	5		5		Measured against how many we want for the year. Not necessarily an "ask" - may be an introduction.
Donors who gave over \$100 last year, repeating this year	56% or more	53%		60%		Dones as a % of total donors who gave \$100 in time period last year.
Fundraising event revenue - net	> \$20,000	\$ 23,000		\$ 20,250		Proportionately to time of year - desired event revenue for 06-07 is \$20,000 net
Finance						
Surplus / deficit compared to budget	within 3%	5%		8%		Measured as % vs. % of year elapsed
Unrestricted liquidity	> 1.0	0.8		1.2		Ratio = Current assets (Cash & Investments + Accounts Receivable - Restricted cash) / current liabilities
Unrestricted contributions (funding diversity)	20% or more	22%		19%		% of individual, corporate & other contributed support to total revenue (excludes foundations)
Human Resources						
Staff retention	80%	100%		100%		% of staff with at least 1 year over total staff
Compensation study	7-Feb	Not Done		N/A		next steps by 2/07
Board Governance						
Attendance at board meetings	90%	100%		100%		% of board at last 4 meetings
New nominees meeting criteria	80%	75%		N/A		% of new nominees meeting at least 6 of 9 established criteria
Focus on strategy and generative issues	75%	80%		60%		% of meeting time during last 2 meetings spent on these issues
Programs						
# of outreach presentations	35	35		37		Count each session regardless of topic
Program Y Activity	500	420		390		Based on previous years' numbers and the strong emphasis on increasing #s
Program X Activity	50	60		52		Based on previous years' numbers with some anticipated growth built in.
Average client satisfaction	4.8	4.9		4.8		Out of 1-5 scale. Don't have mechanism in place for averaging all evals. Need to work on consistency between program areas.

Ranges		
Celebrate	Monitor	Act Now
5 or more	3	2
5 or more	3	2
> 56%	40-55%	< 30%
> \$20,000	\$18,000-20,000	< = \$15,000

Celebrate	Monitor	Act Now
w/in 3%	3-10%	>10%
> 1.0	1	< 1.0
>= 20%	10-20%	< 10%

Celebrate	Monitor	Act Now
80%	70%	60%
Feb-07	Before Feb-07	After Feb-07

Celebrate	Monitor	Act Now
90%	80%	70%
80%	70%	60%
75%	60%	< 50%

Celebrate	Monitor	Act Now
35	< 30	20
500	375-500	<= 375
50	< 45	35
4.8	4.3 - 4.0	< 4.0