**Revenue Dashboard Worksheet**

**Step 1. Discussion (15 min)**

*In your small groups, consider these sample questions – or other questions about revenue evaluation that come to mind.*

1. What are your primary and secondary revenue streams and what should the board know about them?
2. Which revenue streams are the steadiest and the most variable, and what should the board know about them?
3. How do you know the organization is capitalizing on the most effective and efficient revenue streams?

**Step 2. Brainstorm Metrics (15 min)**

*Based on the previous discussion, brainstorm metrics the board should review on a regular basis. (Example: No. of $10K and above donors). Write your responses in the spaces below.*

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**Step 3. Narrow Metrics and Consider Representation (15 min)**

*Part A: Of the metrics you brainstormed, circle those that are most critical.*

*Part B: Sketch or write how you would represent these metrics in a dashboard. Consider how you would show prior trends and future targets. How would you use color? Be creative and use as much paper as necessary.*

**Programs Dashboard Worksheet**

**Step 1. Discussion (15 min)**

*In your small groups, consider these sample questions – or other questions about program evaluation that come to mind.*

* What are your core programs and how do they vary among participants?
* How do you know your core programs maximize mission impact?
* Do you measure the true program cost of core programs, inclusive of direct AND indirect costs?

**Step 2. Brainstorm Metrics (15 min)**

*Based on the previous discussion, brainstorm metrics the board should review on a regular basis (Examples: Size of grass-top network, diversity of legal docket).* *Write your responses in the spaces below.*

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**Step 3. Narrow Metrics and Consider Representation (15 min)**

*Part A: Of the metrics you brainstormed, circle those that are most critical.*

*Part B: Sketch or write how you would represent these metrics in a dashboard. Consider how you would show prior trends and future targets. How would you use color? Be creative and use as much paper as necessary.*

**Operations Dashboard Worksheet**

**Step 1. Discussion (15 min)**

*In your small groups, consider these sample questions – or other questions about operations and infrastructure that come to mind.*

* What are the three largest expense types and do you have a way to evaluate their effectiveness in carrying out strategies?
* What could be accomplished with stronger systems and support?
* What can be accomplished through greater engagement and utility of the board?

**Step 2. Brainstorm Metrics (15 min)**

*Based on the previous discussion, brainstorm metrics the board should review on a regular basis. (Examples: Cost of IT support; staff turnover). Write your responses in the squares below.*

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**Step 3. Narrow Metrics and Consider Representation (15 min)**

*Part A: Of the metrics you brainstormed, circle those that are most critical.*

*Part B: Sketch or write how you would represent them in a dashboard. Consider how you would show prior trends and future targets. How would you use color? Be creative and use as much paper as necessary.*

**Capital Structure Dashboard Worksheet**

**Step 1. Discussion (15 min)**

*In your small groups, consider these sample questions – or other questions about capital structure that come to mind.*

* What are the two largest assets and liabilities? Are your assets liquid or illiquid, restricted or unrestricted?
* Do you have sufficient reserves and how are they structured?

**Step 2. Brainstorm Metrics (15 min)**

*Based on the previous discussion, brainstorm metrics the board should review on a regular basis. (example: Months Operating Reserve).* *Write your responses in the squares below.*

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**Step 3. Narrow Metrics and Consider Representation (15 min)**

*Part A: Of the metrics you brainstormed, circle those that are most critical.*

*Part B: Sketch or write how you would represent them in a dashboard. Consider how you would show prior trends and future targets. How would you use color? Be creative and use as much paper as necessary.*