

Tracking Chapter Effectiveness: Tips for Creating Powerful Dashboards

“A dashboard is a visual display of the most important information needed to achieve one or more objectives, consolidated and arranged on a single screen so the information can be monitored at a glance.” *Stephen Few, Principal of Perceptual Edge*

An effective dashboard...

- Keeps Your Eyes on the Road – Focuses attention on where we’re going.
- Tells a Story – Provides context, color and meaning.

Power of having data depends on what you can do with it: identify opportunities, inform decisions, detect threats and drive behavior.

Characteristics of a well-designed dashboard include:

- Transparent/Simple Calculation – Does everyone understand how it was generated?
- User-friendly Navigation – Can I find what I need to know?
- Relevant Resources – Does it lead me to solutions I can implement to improve?

Making it Meaningful

- **Identify the strategic goals** for your components. Clearly articulate how your components advance the mission of the association.
- **Translate the goals into performance metrics.** Focus on metrics that are actionable and which track outcomes. Avoid “hold xx events.” Replace with “increase % of members participating in events.” Follow the mantra: Meaningful (to mission and members); Measurable (trackable/countable); Achievable (Appalachians vs Himalayas); and Time-constrained. See [Compliance: Do We Really Need to Bring Our Volunteers to Volun"tears"?](#) for more ideas.
- **Identify the strategic goal(s) for your dashboard.** Determine the specific behaviors and outcomes you want the dashboard to drive.
 - Informational – support decision-making
 - Motivational – drive behavior
 - Correctional – keep on track (alerts)
- **Identify who will use the dashboard and how they will use it.** Remember that Attention Span is SHORT! Needs of national staff vs. chapter staff vs. volunteer are all DIFFERENT!

Key Performance Indicators for Chapters

Engagement > *Participation*

Membership >
Recruitment/Renewal

Financial > *Income/Expense*

Activity > *Posts, Registrations, Volunteering, Donations...*

Perceptions > *Satisfaction, Net Promoter Score, Ratings, Comments*



Tip! Start with a task force of key stakeholders to generate the goals, what can be measured, what we want to measure. This input is critical to assure buy-in.

Making it Usable – What does it look like?

- Focus attention on where we're going and what's important. Keeps Your Eyes on the Road.
- Tell a Story – Provides context, color and meaning.
- Show goal and progress – consider Act Now, Monitor, Celebrate
- Emphasize Exceptions
- Size Matters! - Data Appropriate Graphics
 - Appropriate Contrast
 - Generally Large Sans Serif Font
- Labels w/Mouse-Over Detail
- Display Timeline & Refresh Rate
- Offer Comparisons (Goal/History)
- Drill Down & Be Comment Capable
- Easy to aggregate data, draw trends, share results
- Easy for volunteers to submit: CFMA online form

Test your Performance Indicators

- Are they valid, reliable, relevant?
- Actionable – Do I have any control over this outcome?
- Common Interpretation – Does my “10” = your “10”?
- Accessible/Credible – Is the data available with modest effort from trustworthy source?

“Perfection is achieved, not when there is nothing more to add, but when there is nothing left to take away.” *Antoine de Saint-Exuper*

Resources

- Listen to the [Tracking Chapter Effectiveness: Tips for Creating Powerful Dashboards](#)
- Read the [original study](#) on Chapter Dashboards for a look at make-or-break indicators
- Download [Creating Powerful Dashboards](#) for case studies from CRPs
- Read [On the Fast Track to Fast Data](#); connection with the ASAE ForesightWorks
- Read [Fast-Data Education](#) for a look at engaging staff in using dashboards
- View [Chapter Dashboards Part 1: What's Measured is Real](#)
- Read [How Do I Say It With Charts?](#)
- Read [Four Key to Leading with Data](#)
- Read [Confessions of a Dashboard-a-holic \(Texas Medical Association\)](#)
- Read [Drowning in Data? Create a Dashboard](#)

Need Help? We're here! Let Mariner help you evaluate options, build a dashboard or navigate how to help chapters use and flourish tapping into your dashboard.

