

# Measure What Matters: Best Practices for Board Dashboards

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# Agenda

1

A Case for Board Dashboards as a Tool of Good Governance

2

Creating a Shared Understanding Around what Matters

3

Data Analysis, Data Storytelling, and Dashboards, Oh My!

4

Data Literacy and Iterating on Your Dashboard

# *Mission* & DATA

Mission-driven, Data-informed Leadership and Governance

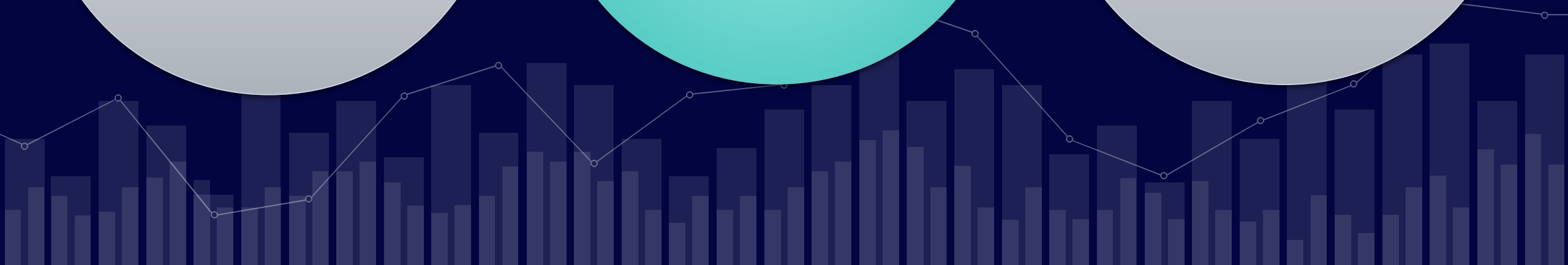
**Mission  
Driven**

+

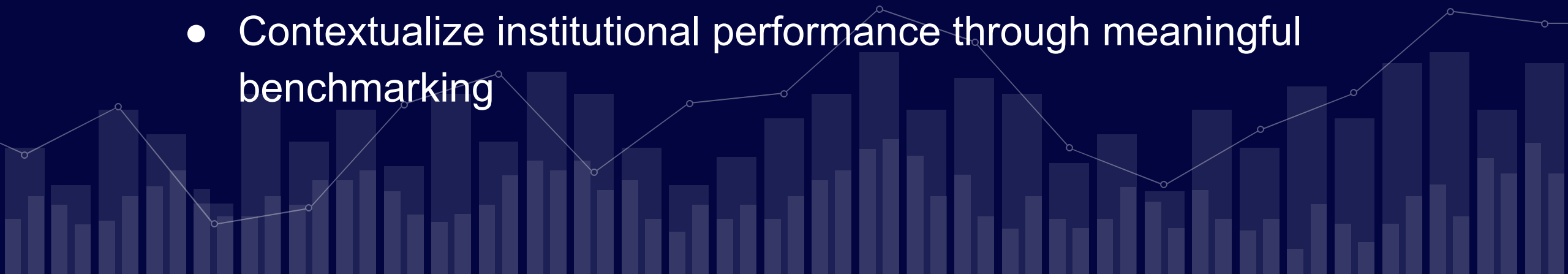
**Community  
Centered**

+

**Data  
Informed**



# Functions of a Board Dashboard

- Create a shared understanding for institutional and board thriving
  - Facilitate mission-driven, data-informed decision-making
  - Document and encourage dialogue around progress towards goals
  - Quickly identify successes and challenges, allowing the board to be proactive, agile, and flexible
  - Contextualize institutional performance through meaningful benchmarking
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# What Is Mission-Driven Data-Informed Decision Making?

**1. Shared Purpose**

2. Analysis

3. Create a Shared Understanding

4. Engage in Decision Making/Action Planning

5. Evaluate and Iterate



# Articulating a Shared Purpose - Questions

## Board Data to Inform Effective Governance

How do we maintain high levels of trustee engagement?

What trends could affect our school's viability?

Are our resources deployed in the best way to fulfill the mission?

How do we build a robust and diverse pipeline of new trustees?

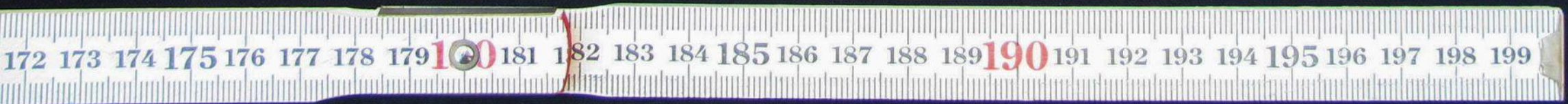
## Operational Data to Inform Strategic Thinking

Do we have the resources to thrive?

Does our value proposition resonate with families, as seen in enrollment and retention?

What is our market position and possibilities in our area?

How are we progressing towards our strategic goals?



Some things are easy to measure, like enrollment, finance, and fundraising targets.

But what about squishy cultural or subjective goals?



**Looks Like...**

Maintain high  
levels of  
trustee  
engagement

**Sounds Like...**

**Feels Like...**

# Looks Like...

## Chair and Secretary Check

Trustees attend board and committee meetings

Board agendas include opportunities for education and interaction

Trustees collaborating

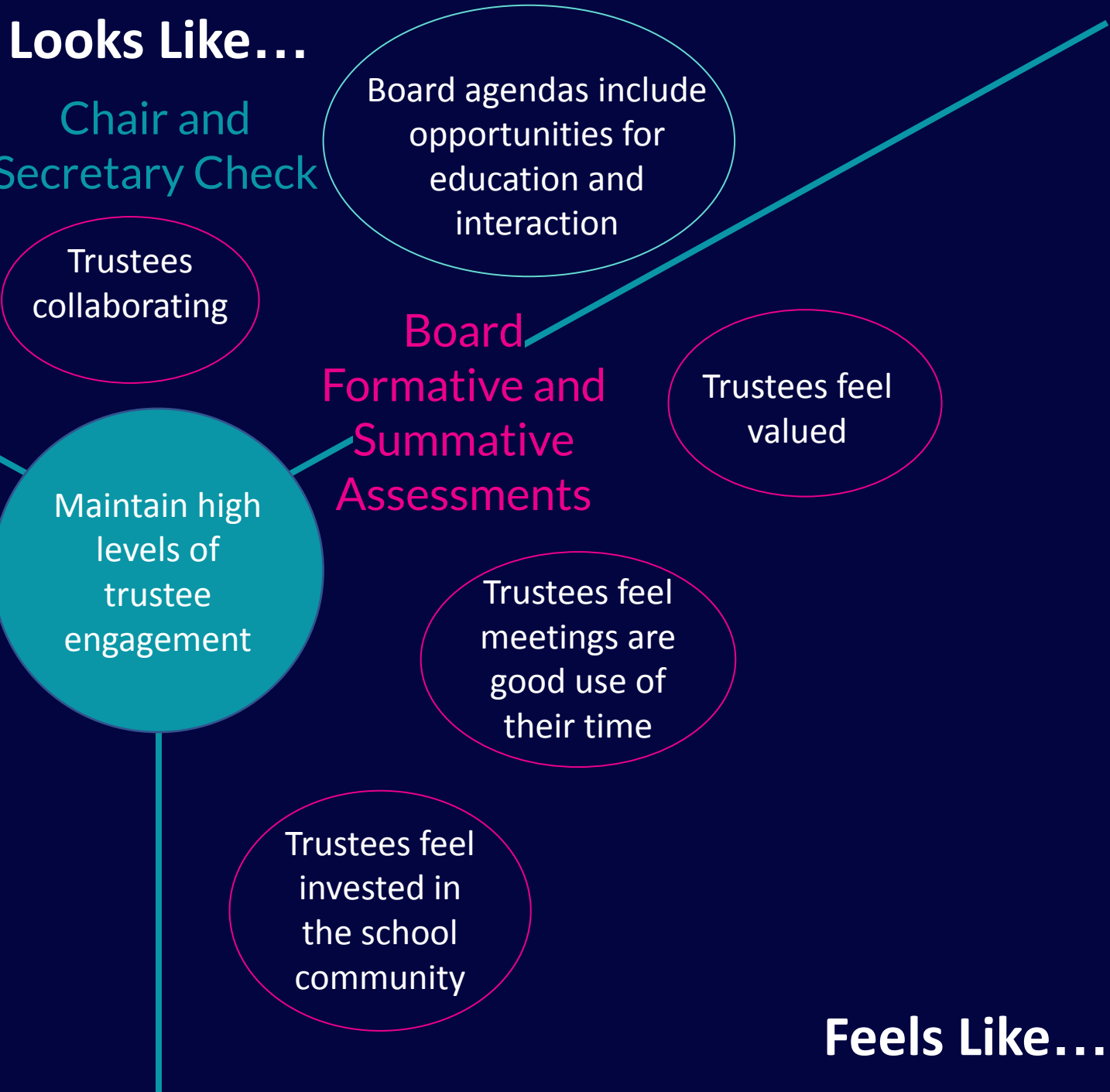
## Board Formative and Summative Assessments

Trustees feel valued

Trustees feel meetings are good use of their time

Trustees feel invested in the school community

Maintain high levels of trustee engagement



Trustees have joyful conversations before and after meetings


Trustees respectfully discuss difficult topics

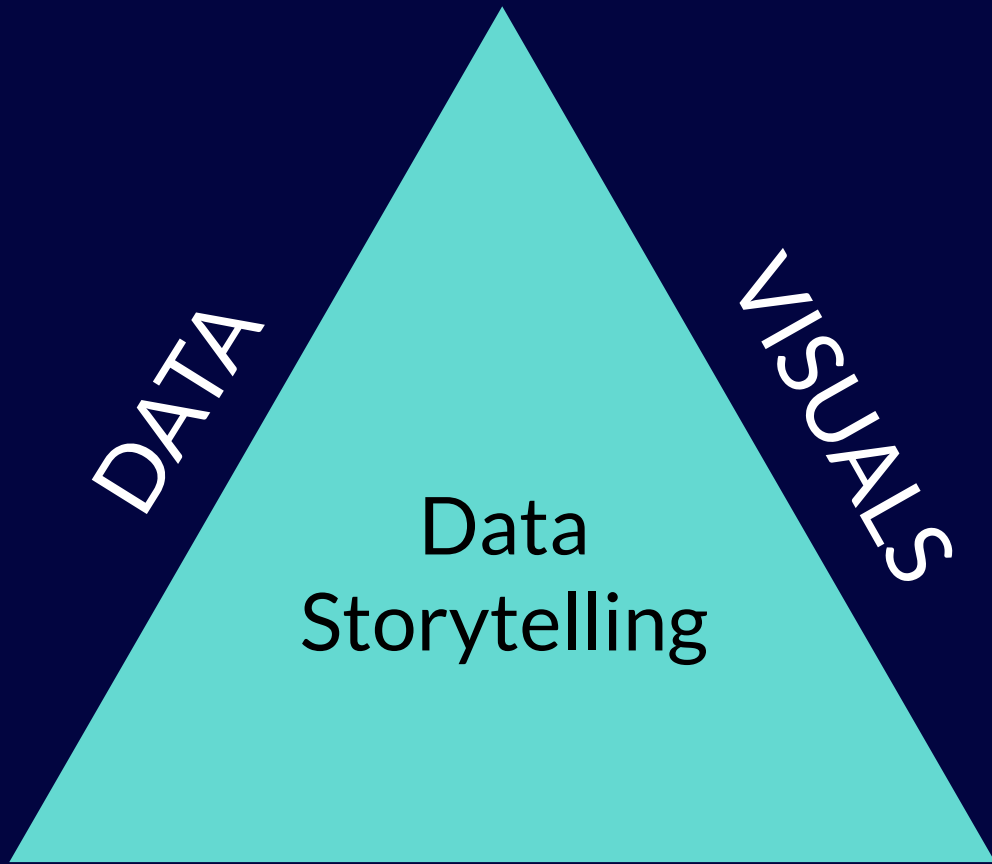
Trustees ask insightful questions

# Sounds Like...

# Feels Like...

# What Is Mission-Driven Data-Informed Decision Making?

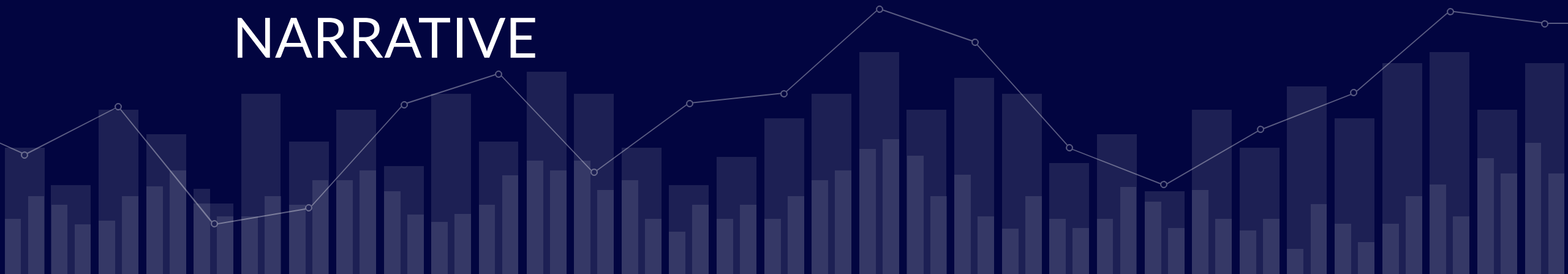
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“Stories are the single most powerful tool in a leader’s toolkit.”

Howard Gardner

NARRATIVE





# Data as a Mirror

A scenic view of a valley with terraced fields and mountains, seen through an open window. The sun is low in the sky, creating a warm, golden glow over the landscape. The foreground shows lush green trees and a grassy slope. The middle ground features terraced fields and a winding path. The background consists of rolling hills and mountains under a bright sky. The text "Data as a Window" is centered over the image in a white, sans-serif font.

# Data as a Window

# Who Are You Benchmarking Against?

## Competitive Set

- Schools against whom you currently compete for students
- Schools against whom you compete for faculty and staff
- Geographically bound (except for boarding schools)

## Aspirational Group

- What type of institution does your school aim to be?
- Which schools (locally or nationally) are blueprints for you to follow?

## Peer Institutions

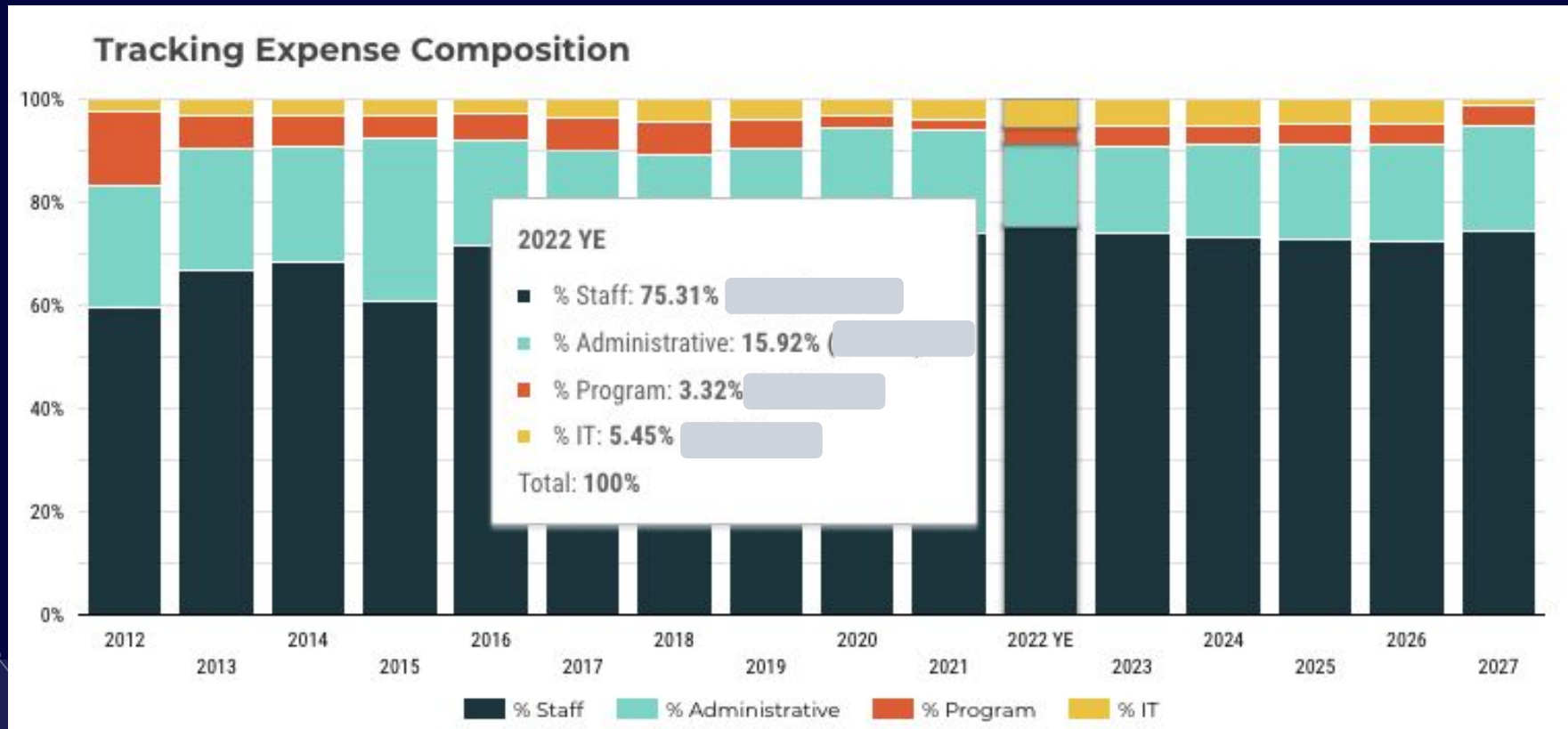
- Other schools that look like your school
- Same budget size, enrollment size, position in market, characteristics
- Can be in other cities or states!



Beware the Kitchen Sink Problem



# Visuals Should Help Focus on What's Core



Time Frame

- 10-Year Historical
- 3-Year Historical
- Current Year
- Current Year Forecast
- Future Projection

# Narrative Adds Context

- Add text fields to incorporate guiding questions, updated commentary, or explanatory insights
- Video reports to walk through insights
- Incorporate dashboard training into onboarding materials
- Intentionally make time for data literacy exercises and discussion in the board's agenda



# Show & Tell

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# What Is Mission-Driven Data-Informed Decision Making?

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# Intentional Coaching on Data Literacy

**What do I  
(you/we) see?**

- Align on reality
- Ensure comprehension
- Generate questions


**What does it  
mean?**

- Uncover biases
- Explore root causes
- Understand context

**Why does it  
matter?**

- Forecast possible futures
- Align to mission and strategic goals

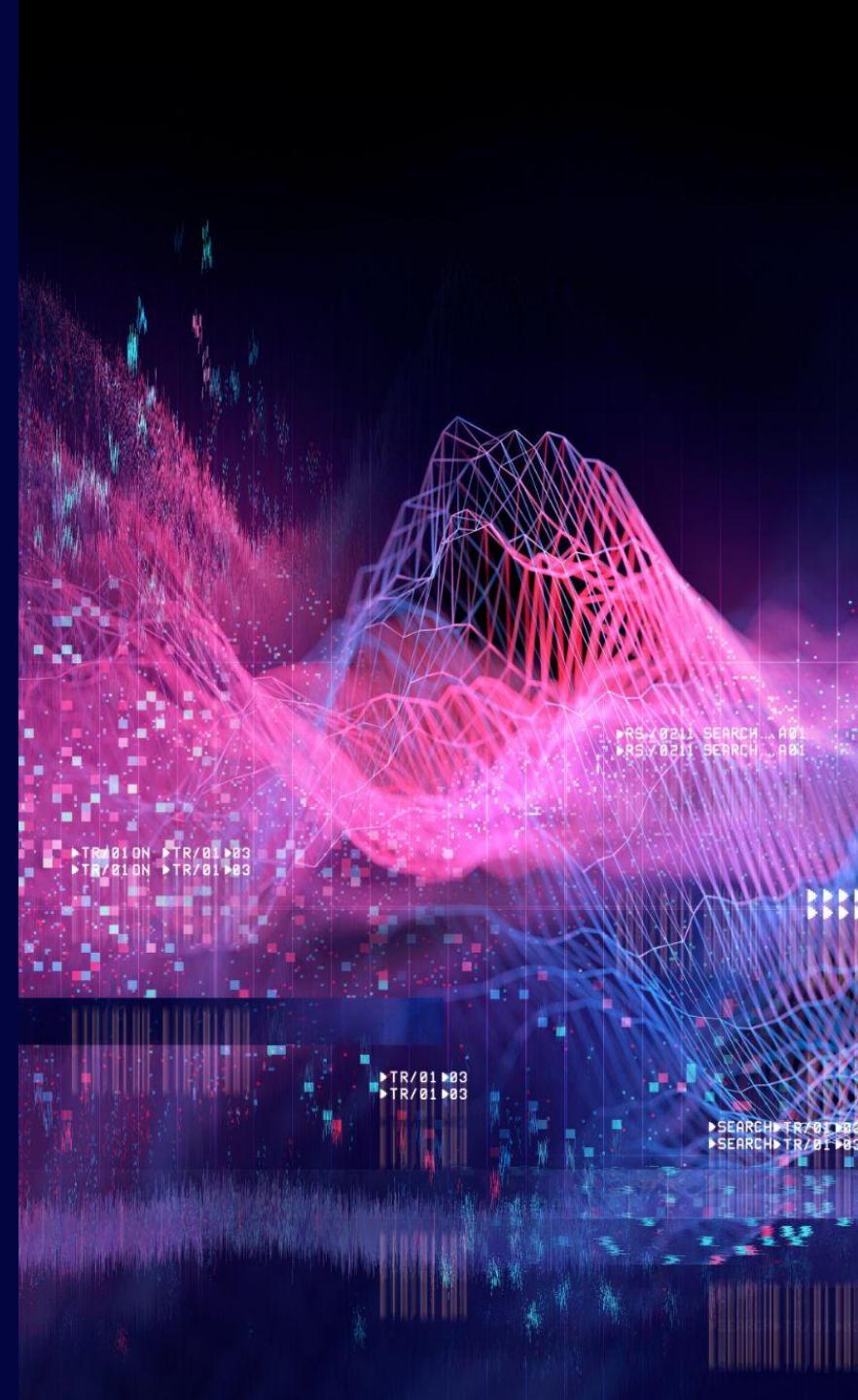
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# Assessing Metric Validity

Are you measuring what matters? Are you sure what you're measuring is predictive?

- When your outcome is reached, are you closer to your goal?
- Are there false flags - outcomes that have no predictive weight to goal success?
- Is there a way to validate what you think is happening with feedback or check ins?

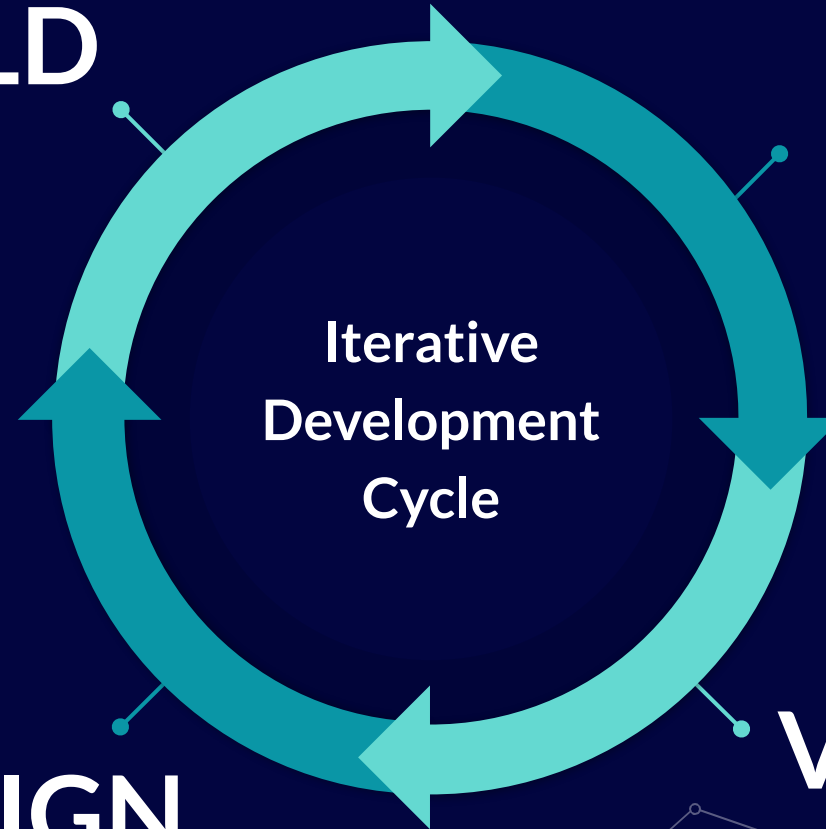


LOREM 4



## BUILD

- ✓ Build and test new dashboards and data collection systems.



## LAUNCH



- ✓ Deploy dashboards.
- ✓ Coach for data literacy and mission-driven, data-informed decision making.



## DESIGN

- ✓ Refine and/or create new dashboards, data collection systems as needed.

## VALIDATE



- ✓ Are there questions that can't be answered?
- ✓ Are there opportunities for further refinement?

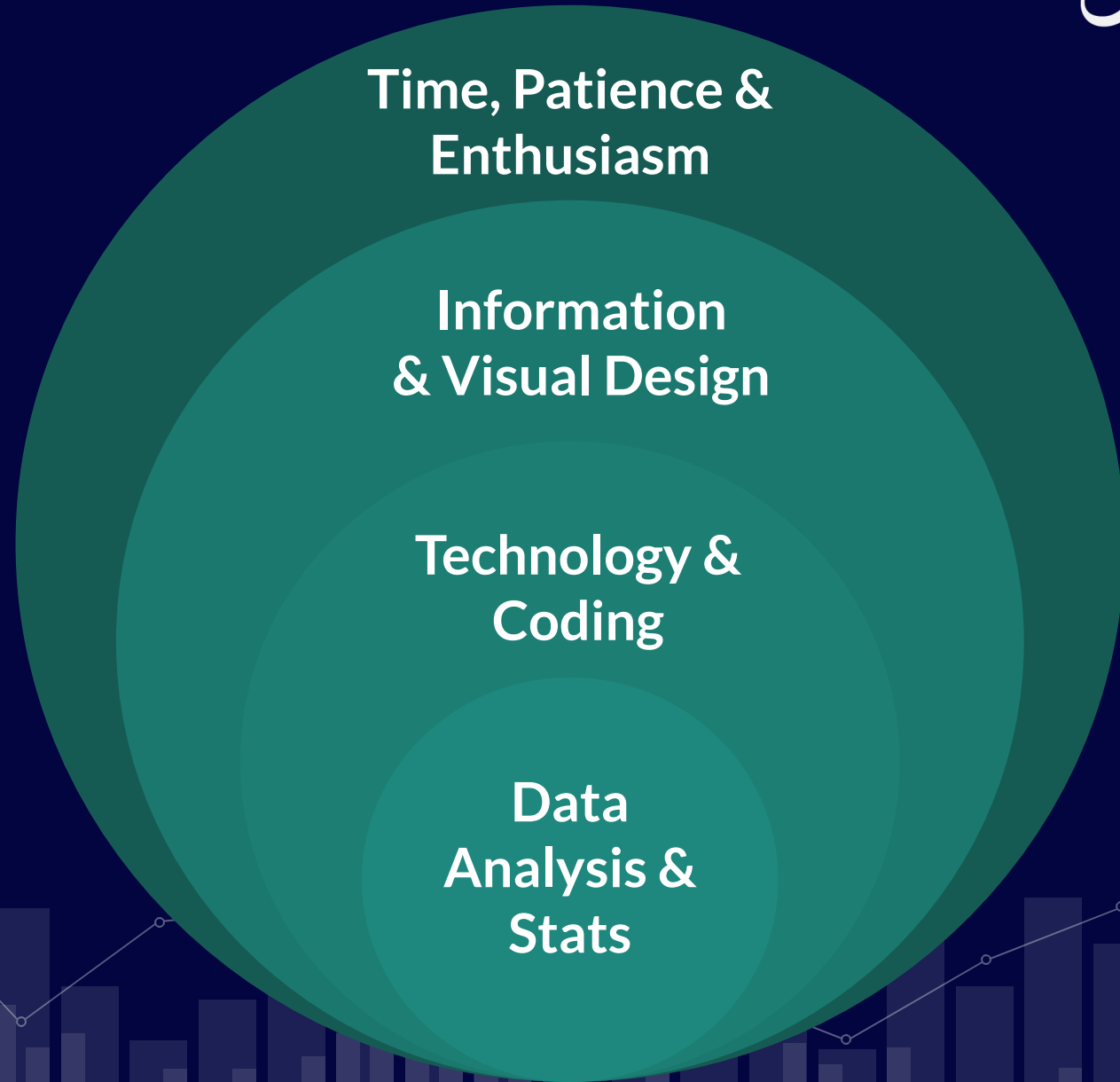


# FREE Solutions for Building Dashboards



**BUT WAIT:** Who will be responsible for building and maintaining the board dashboard?

Does this person  
currently exist at  
your school?





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**Mission & Data** is a firm dedicated to the effectiveness, health, and vitality of educational institutions and other organizations that make the world a better place. We are committed to enhancing mission-driven, data-informed leadership and governance by:

***Integrated strategy consulting*** to improve organizational effectiveness and facilitate organizational transformation.

***Developing custom data products***, visualizations, and dashboards to highlight progress, identify trends, and leverage actionable insights.

***Auditing current practice*** and analyzing organizational data to recommend process efficiencies and strategic improvements.

***Coaching leaders and boards of trustees*** to enact institutional vision and build a culture of inquiry-based decision making practices.

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