

Financial Management Institute

MONITORING ORGANIZATIONAL EFFECTIVENESS

Key Performance Indicators

- Many organizations develop Key Performance Indicators (KPI's)
- What is a KPI?
- How would/could they be useful in managing the organization?
- Potential problems or pitfalls in using KPI's???

Performance Dashboards

- What do you think of when you hear the term “dashboard?”
- What does a dashboard convey?
- How could the dashboard concept be applied to a corporate or organizational setting?

Financial Analysis & Ratios for Non-Profit Organizations

Financial Analysis of Non-Profits:

- Current ratio
- Debt ratio
- General & administrative expense %
- Fund-raising expense %
- Operating margin %
- Revenue mix
- Net asset mix

Performance Dashboards



- What elements are necessary for a meaningful and useful dashboard?
- Exercise on dashboards

Summary and Wrap-Up

- Non-profit organizations have unique accounting issues (e.g., net assets)
- Analysis of a non-profit financial statement can provide insights into their effectiveness and financial strength
- Budgeting can be an effective tool in monitoring the operations of an organization.

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