Beyond the Spreadsheet:
Give Your Board the Data They Want, and the Information They Need
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Imagine...
Why does good reporting matter?

(hint: It’s not about your job -- it’s about theirs)
Actively Participates
Ensures accurate financial records and processes
Oversees Management
Attends Meetings
Is Educated on the industry
Provides Strategic Direction

Duty of Care
capacity + reach
“The Big Book of Information Overload just came in.”
1. Engaging

(How do these numbers relate to your mission?)
Data vs Mission
COMPAS Key Measures (DATE)

Fund Development:

<table>
<thead>
<tr>
<th>Donor Type</th>
<th>Annual Goal</th>
<th>YTD Goal</th>
<th>Actual Month</th>
<th>YTD Total</th>
<th>% of YTD Goal</th>
<th>% of Annual Goal</th>
<th>Known; not booked</th>
<th>Compared to YTD FY'18</th>
</tr>
</thead>
<tbody>
<tr>
<td>Individuals (no events, board)</td>
<td>$100,000.00</td>
<td>$91,666.67</td>
<td>$5,000.00</td>
<td>$60,000.00</td>
<td>65%</td>
<td>60%</td>
<td>$2,000.00</td>
<td></td>
</tr>
<tr>
<td>Board (no events)</td>
<td>$20,000.00</td>
<td>$18,333.33</td>
<td>$100.00</td>
<td>$19,000.00</td>
<td>104%</td>
<td>95%</td>
<td>$1,500.00</td>
<td></td>
</tr>
<tr>
<td>Organizations</td>
<td>$400,000.00</td>
<td>$366,666.67</td>
<td>$40,005.00</td>
<td>$250,000.00</td>
<td>68%</td>
<td>63%</td>
<td>$50,000.00</td>
<td></td>
</tr>
<tr>
<td>Government</td>
<td>$200,000.00</td>
<td>$183,333.33</td>
<td>$-</td>
<td>$180,000.00</td>
<td>98%</td>
<td>90%</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td>Board (Event Giving)</td>
<td>$20,000.00</td>
<td>$18,333.33</td>
<td>$100.00</td>
<td>$12,000.00</td>
<td>65%</td>
<td>60%</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td>Events</td>
<td>$100,000</td>
<td>$91,666.67</td>
<td>$4,000</td>
<td>$85,000.00</td>
<td>93%</td>
<td>85%</td>
<td>-</td>
<td></td>
</tr>
<tr>
<td>Totals:</td>
<td>$840,000.00</td>
<td>$770,000.00</td>
<td>$49,205.00</td>
<td>$606,000.00</td>
<td>79%</td>
<td>72%</td>
<td>$53,500.00</td>
<td></td>
</tr>
</tbody>
</table>

Earned Revenue:

<table>
<thead>
<tr>
<th></th>
<th>Annual Goal</th>
<th>YTD Goal</th>
<th>Actual YTD Bookings</th>
<th>% of YTD Goal</th>
<th>% of Annual Goal</th>
<th>Compared to YTD FY'18</th>
</tr>
</thead>
<tbody>
<tr>
<td>Total Programs</td>
<td>$600,000.00</td>
<td>$550,000.00</td>
<td>$500,000</td>
<td>91%</td>
<td>83%</td>
<td>$600,000.00</td>
</tr>
<tr>
<td>Total Revenue Goal:</td>
<td>$1,440,000.00</td>
<td>Actual YTD:</td>
<td>$1,106,000.00</td>
<td>% of Goal: 77%</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
“Here’s where you give me non-comprehending nods of approval.”
2. Brief

Brevity is the soul of reports.
- (said a smart person once, we’re pretty sure)
## COMPAS Development Dashboard

**Funding YTD as of 6-9-2018**

<table>
<thead>
<tr>
<th>Category</th>
<th>Board Giving</th>
<th>COMPAS Events</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Total</strong></td>
<td>$25,000</td>
<td>$10,000</td>
</tr>
<tr>
<td>Individual Giving</td>
<td>0%</td>
<td>0%</td>
</tr>
<tr>
<td>Organizational</td>
<td>0%</td>
<td>0%</td>
</tr>
</tbody>
</table>

### Key Reporting:

- **Individual Giving:** 0%
- **Organizational Giving:** 0%

### Individual Giving by Language:

<table>
<thead>
<tr>
<th>Language</th>
<th>% of Total</th>
<th>Target</th>
<th>Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td>English</td>
<td>0%</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>Spanish</td>
<td>0%</td>
<td>0</td>
<td>0</td>
</tr>
</tbody>
</table>

### Quick highlights:

- **Individual Giving**:
  - A kickball tournament is planned for Saturday, August 15th, to raise funds to meet a $5,000 match from the Weiss Foundation in support of our work at Children's Hospital. Mark your calendars!
  - You can help by:
    - Mark your calendar for the COMPAS Gala on December 6th, 2018.
    - Assist in selling tickets and tables for the December Gala.
    - Assist in selecting or donating high-value ($100+) auction items for the Gala.

- **Organizational Outreach**:
  - Share your connections with corporations and organizations that could be potential event sponsors.
  - Assist in soliciting sponsorship requests.
  - Do you know anyone who works at HBC as a financial planner or at Vesta? We're looking for an individual who can support our sponsorship request.
  - COMPAS Teaching Artists will be teaching at many local libraries over the summer, including Roseville, Golden Valley, and White Bear Lake libraries. Check out COMPAS.org/events for more information on these free workshops — and spread the word!
Your Space  

Their Space  

Boundary
3. Understandable

“%-)@!! ^%%#, $%$%$%=$$ $$$ .....got that?”
OUR SIMPLE PLAN

\[ 3 \times 6 \sqrt{10} = (x) + (y) + 3 \times 5 \times 1024 \times 2 \]

\[ 7 \div 2 \sqrt{8} = \sqrt{3 \times 2} \times 500 \times \frac{1}{2} \times 7 \sqrt{6} \times 64 \times 3 \times 69 \times 70 \]

\[ 8 \times 7 \times 5 \times 4 \times 3 \times 2 \times 1 \times 64 / 392 \times 7 \]

\[ \sqrt{9 \times 16} \times 16 \times \sqrt{500} \times 6890 \]

\[ 7 \times 5 \times 4 \times 3 \times 2 \times 1 \times 64 / 392 \times 7 \]

\[ \sqrt{9 \times 16} \times 16 \times \sqrt{500} \times 6890 \]
It’s not just for your board...

(Simplicity and accessibility helps you too)
4. Accurate

(Consistency = trust)
I'm going to need that report by whatever time you find most inconvenient!
You don’t have to go it alone.

(Accuracy = everyone’s responsibility)
5. Open

(Honesty + transparency builds trust -- and leads to more help when you need it.)
“We are communicating better but we are still not out of the woods.”
**FY 2017 Expenses**

$1,387,917

**Individual Donations** $99,158
**Foundation & Corporate Support** $378,978
**Government Support** $279,089
**Program Service Fees** $373,877
**In-kind Contributions** $12,144
**Other Revenue** $5,727
**Special Events** $23,407

**Program**
- **Artful Aging™ & Arts in Healthcare** $489,934
- **Art Awareness** $359,988
- **Creative Classroom** $16,649
- **Creative Community** $337,331

**Core Mission Support**
- **Management & Governance** $142,792
- **Partnerships & Fundraising** $81,203
Active Participation
Ensures accurate financial records and processes
Attends Meetings
Oversees Management
Is Educated on the industry
Provides Strategic Direction

Duty of Care
you can do it
Contact us:

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