

# EMPOWERED

2025 | USER CONFERENCE | DETROIT, MI

## **Dashboards & Reports for Annual Reporting: Turning Data into Insights**

PRESENTED BY

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akoyaGO

# SESSION OBJECTIVES

What's in it for you?

Practical insights, real examples, and  
tools you can use right away

- Build a clear path from raw data to impactful reporting
- Use real-time reporting to drive strategic decisions
- Design visuals and dashboards that resonate with your audience
- Explore akoyaGO examples (+ a bonus Power BI dashboard!)
- Leave with tools to enhance quarterly, annual, and ad hoc reporting

# WHY ME?

- Director of Development
  - Fundraising \$6 million annually
- Nonprofit board experience
  - School district foundations, local nonprofits
- Director of Mountain America Foundation
  - Reporting to credit union members, board, and leadership

## My Reporting Perspective



# START SMART

Laying the groundwork for  
great reporting

- Data integrity
- Defining what matters

# IMPORTANT: DIRTY DATA

- Data entry rules and processes
  - “Clean as you go”
- The closet hack



## Best Practice

Your outputs are only as good as your inputs – ensure your data is clean(*ish*)!



# MY DISCOVERY THOUGHT PROCESS

- **Define the audience/key stakeholders**
  - Who do I provide reporting to?
- **Clarify the purpose**
  - What do they care about?
  - What level of detail do they need?
- **Answer key questions**
  - What do we need to know to fulfill that purpose?
  - What are the most important questions the report should answer?



# MY DISCOVERY THOUGHT PROCESS

- **Align with strategic priorities**
  - How does this reporting connect to our mission and objectives?
  - Are we measuring what matters?
- **Figure out frequency & format**
  - How often is the report needed?
  - What format best fits our needs? (dashboard, PDF, email summary, etc.)
- **Take inventory of existing data**
  - Do we already collect this data?
  - Is it clean, current, and accessible?
- **Modify and design accordingly**

# DATA METRICS BRAIN DUMP

- Grants

- Awarded, dollar amount, by program, by priority, by region, by population served, decline rate, by # impacted
- Average grant size, multi v. single year, new v. repeat, unrestricted v. restricted
- User experience: Time from application to decision, time from approval to disbursement
- Strategic priority or organizational objectives (i.e., critical measures)

# DATA METRICS BRAIN DUMP

- Financial performance
  - Endowment growth
  - Administrative cost ratio (overhead v. programs)
  - Fund balances by type (donor-advised, scholarship, etc.)
  - Fund inflows (donations, new gifts, contributions)
  - Fund outflows (grants, fees, expenses)
  - Budgets and payments
- Donor tracking & cultivation
  - Active fundholders, new funds opened
  - Donor retention rates
  - Donor contributions & type (cash, stock, planned, etc.)
  - Donor touchpoints/interactions

# THE ROLE OF REPORTING

- Types of reporting
- From records to dashboards

# TYPES OF REPORTING

- Board meetings
- Monthly reporting (i.e., board report)
- Donor updates
- Internal reviews
- Strategic planning
- Annual report
- Others?



# ANNUAL REPORTS

- More visuals, less text
- Storytelling
  - Make it personal
- Design thinking – user-first approach

## Best Practice

Less is more, but make the “less” meaningful & memorable

# EXAMPLES

- Building Dynamics dashboards within akoyaGO
- *Bonus: The power & purpose of PowerBI*

# THANK YOU

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