



# DATA DASHBOARDS DEMYSTIFIED:

## Why So Many Trustees Are Asking for Them And How They Can Benefit the Board and the School

*By Alison Cumming, Director of Publications & Research*

Diligent Boards are always information-hungry, and independent schools are well served by trustees who seek evidence that the school is performing well in all areas. At the same time, though, the thirst for more and more data can be insatiable and ultimately unproductive if the information presented does not directly support the Board's governance function. Furthermore, the process of data collection and analysis can be very time-consuming for the school administration and staff. Time spent on this task is time not spent on other tasks that are vital to the school's success.

Increasingly, we are hearing from trustees and Heads frustrated by the challenge of developing governance information systems that fit the independent school culture and give Boards the information they need. Too often, senior administrators attempt to address this concern by inundating trustees with data, only to find that trustees respond by asking for more!

We believe most Boards don't actually lack for data – ***what they are missing is context and meaningful analysis***. Particularly in areas related to the core mission of teaching and learning, trustees (most of whom are not educators) find themselves stymied as they grapple with their responsibility to monitor and improve the school's performance.

Specifically, they are asking:

1. How can we measure the true impact of the education we provide – the value we add after we take into account the many elements that are outside of the school's control?
2. What is the appropriate oversight role of the Board in evaluating faculty effectiveness?
3. What is the valid and appropriate use of standardized test data as a tool to evaluate students, teachers, and the academic program?
4. Is there a way to aggregate the individual experiences of our students as they move through the school in order to develop a better understanding of the interplay of academics, extracurriculars, and personal relationships in producing graduates who exemplify our goals and values?
5. How do we monitor the opinions of our various constituencies (parents, students, faculty, young alumni, and prospective families) and incorporate their views into our deliberations and decision-making?

Many trustees are accustomed in their professional lives to reviewing performance metrics. So it's not surprising that they are asking their Heads to generate similar tools.

## The Value of Governance Dashboards

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As an oversight and policymaking body, the Board of Trustees can meaningfully employ well-designed dashboards to support the following key responsibilities:

1. To monitor performance against its policy directives.
2. To monitor performance and progress toward strategic goals.

3. To evaluate the extent to which the school is accomplishing its stated mission.
4. To monitor institutional health and viability.
5. To evaluate the school against peer institutions and identify areas in which data suggests the school could improve relative to those peers.

Metrics included in the dashboards can take several forms:

1. Historical trends.
2. Comparisons across grades or divisions.
3. Performance against external benchmarks (schools or association data).
4. Performance against targets set by the Board and/or administration.
5. Aggregates of student experiences (i.e., collecting data about the experiences and/or characteristics of individual students and/or graduates, then aggregating that data to identify patterns and trends).
6. Results of input by constituents (e.g. satisfaction survey data).

All of these data can be truly enlightening to Boards eager to understand how effectively the school is accomplishing its mission. But embarking upon a foray into data-driven governance carries potential dangers as well. Bombarding trustees with a blizzard of facts and figures can actually distract the Board's attention from big-picture performance measures by encouraging detours into interesting but ultimately unrewarding debates. **The essence of the dashboard development process is the distillation of data so that the truly important emerges.**

We believe that thoughtfully developed dashboards can lead to real improvements in the school's program. Through the process of determining what you intend to measure, you make important decisions about what you value and, ultimately, how you want the school to change.

There is also a real risk, however, that choosing the wrong metrics – or unbalanced metrics – can trigger unintended consequences. In thinking about the development of programmatic dashboards, we are particularly interested in the natural tension that exists in schools between performance and engagement:

- Performance-based dashboards are relatively simple to design and easy to decipher: Higher scores are better than lower scores; wins are better than losses.
- Measures of growth (improvement over time) and student engagement (the willingness to persevere, try new things, set high personal aspirations) are no less important, but are much more complicated to design and interpret.

Our concern is that the temptation of Boards to rely too much upon static performance measurements (test scores, win-loss records, selectivity of college placements) can in the long run send signals to a school's faculty and students that run counter to its stated mission and vision. The challenge is to design dashboards that productively engage both the Board and the faculty/administration in a united effort to promote continuous improvement in your educational outcomes and in the experience of your students.

## Uses of Dashboards for Independent School Boards

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Well-designed dashboards can inform Board governance in many ways:

- **A monthly one-page Board report**, consolidating admissions, budgetary, and fundraising data the Board typically receives prior to each meeting, plus a mini-calendar of upcoming events relevant to trustees, space for bulleted informational notes from the Head of School, and perhaps a chart or two relevant to an item on the current agenda.
- **A Strategic Planning Dashboard** to periodically monitor progress toward the accomplishment of goals and action steps.

- **Annual or Semi-Annual Dashboards** for major areas of school operations: admissions and financial aid, budget compliance, college placement, diversity initiatives, standardized testing, fundraising, endowment management, etc.
- **Policy Discussion and Monitoring Dashboards**, aggregating relevant data to inform the Board’s decision-making about a proposed policy change. For example, a Board considering a proposal to eliminate the AP program would benefit from a dashboard-style presentation about trends in the participation, performance, and college credit received by students and recent graduates; data regarding class size and cost of the AP program; benchmarking information from peer schools; constituent survey data regarding satisfaction with the AP program, etc.

## The Process We Recommend

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Although it is exciting to contemplate the development of a comprehensive set of dashboards covering all aspects of the Board’s governance role, we recommend that you start small and plan to build upon initial successes.

Here’s one approach:

1. Survey your trustees to determine their satisfaction with the quantity and quality of data they already receive and ask them what additional data they believe they need in order to fulfill their stewardship roles.
2. Create a small working group of interested trustees and administrators to review the trustee input, develop a preliminary set of proposed metrics, and determine what information the school has the capacity to generate.
3. Draft a proposed dashboard or dashboards and set aside time at a Board meeting to review and critique the results. If your initial dashboard review provokes a flurry of micromanaging around the Board table, you probably need to go back to the drawing board. If, however, your new dashboard elevates the Board conversation to issues of mission, strategy, policy, and return on investment, you’ll know you are on the right track!

## Tips for Dashboard Design

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Clearly, the most important elements of the dashboard development process are deciding what information the Board needs in order to govern and determining how that data will be amassed. But much of that work can be undone if the final dashboard product is poorly designed. You should not assume that either the trustees overseeing the dashboard development project or members of the administrative team possess expertise in visual design. The most effective charts and graphs are data-intensive but not visually cluttered – not always an easy balance to strike. A confusing presentation of data can strip your dashboard of value.

A few tips to remember:

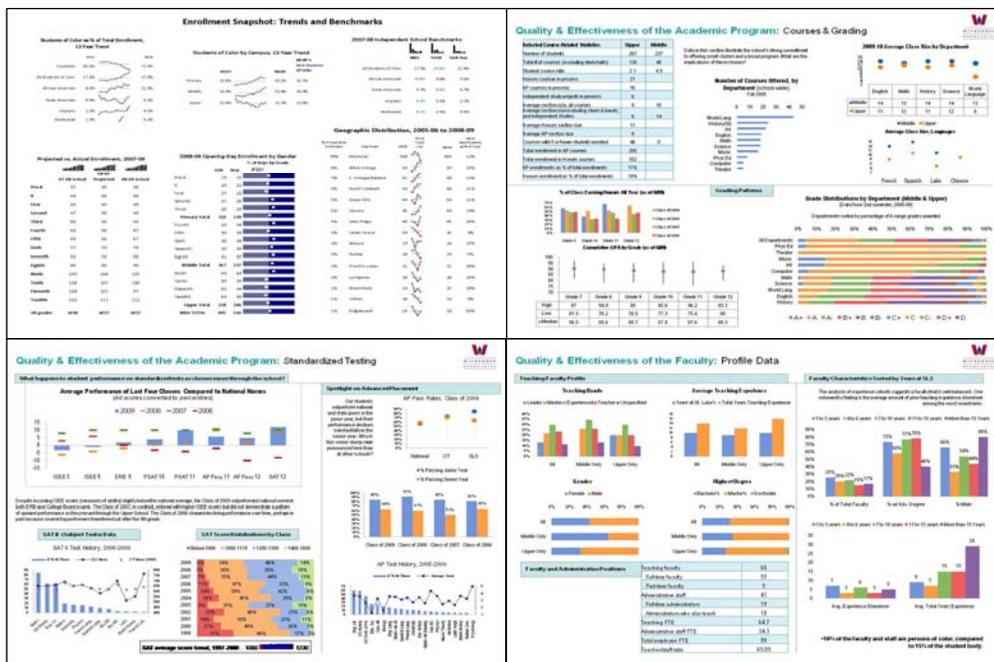
1. Charts are most informative when they integrate information from multiple sources (e.g., peer school data in addition to in-house data) or supply a context in which to evaluate the data (e.g., changes over time). Ideally, each chart included in your dashboard should tell a story. A chart that evokes a “so what?” response may not belong there.
2. Don’t take the dashboard metaphor too far. Tricked-out gauges and fake speedometers are rarely the most effective methods of presenting data.
3. To ensure that dashboards are accurate, readable, and context-rich, seek in-house or outside expertise in information design. Two excellent resources are Edward Tufte, author of *The Visual Display of Quantitative Information* and several other books, and Stephen Few, author of *Information Dashboard Design* and many other informative publications.

# Challenges You Should Expect To Encounter

If you decide to undertake the development of one or more governance dashboards, you should not be surprised to find that:

1. Your trustees will vary widely in their opinions about the amount of information and level of detail they consider appropriate for Board-level review.
2. It will take several iterations to arrive at a dashboard that accomplishes your goals, and that the dashboards will need to continue to evolve as the school's priorities and circumstances change.
3. The school does not have in place a comprehensive data management system that can easily generate the information you are seeking.
4. A significant investment in staffing, training, and/or data management software may be required if you are serious about creating a culture of data-driven decision making.

The good news, though, is that the process of overcoming these challenges should ultimately drive improvements in the school's program and result in better Board engagement around issues that truly matter.



Wickenden Associates provides consulting services to Boards and Heads in the development and design of governance dashboards. For information about these services, contact Wickenden Associates President Jim Wickenden ([jwickenden@wickenden.com](mailto:jwickenden@wickenden.com)) or Director of Publications and Research Alison Cumming ([acumming@wickenden.com](mailto:acumming@wickenden.com)) at 609 683 1355.

