

**STRATEGY PAPERS
COMMITTEE**

Joshua Einhorn, Ed.D.
Editor

Sean Kirby and
Joan L. Whitman, Ph.D
GPA Publications
Committee Co-Chairs

GPA Strategy Papers offer practical solutions to current and emerging issues facing grant professionals. The GPA Strategy Papers Committee accepts concept proposals on a quarterly basis and uses a double-blind peer review process.

Members and nonmembers may submit concept proposals and have electronic access to approved papers.

Articles in this publication represent the opinions and views of the author(s) only.

www.grantprofessionals.org

**A Dashboard that Injects Measurable
Impact Into Project Design**

Mark Goldstein, CFRE
President/CEO, Communication Mark
Arden, NC

GPC Competency :03. Strategies for effective program and project design and development
GPC Competency 08. Methods and strategies that cultivate and maintain relationships between fund-seeking and recipient organizations and funders

Abstract

A 'Dashboard' tool and methodology can address a challenge commonly faced by grant professionals: translating a new or existing service into a measurable, impactful, fundable, and universally understood project. The Dashboard is an accessible way to inject strategic planning into grant writing that promotes evaluation and straightforward, executive decision-making.

Introduction

Organizations earn nonprofit status by demonstrating public benefit. Evaluation documents provide valuable feedback to maximize public benefit. However, impact measurement can mystify, burden, and even annoy service providers who are already juggling numerous tasks. To complete this work, grant professionals must often ask coworkers to help envision and report on quantitative and qualitative positive change from organization efforts. A Dashboard spreadsheet avoids this complication by translating services—activities provided for client benefit—into projects—bundled services viewed as impactful and worthy of investment. This enables the grant professional and service provider staff to mutually create project objectives, outcomes, and budgets that are clear to grantmakers.

Need, Rationale, and Early Development

The author has nearly a decade of first-hand experience as an agency employee and twenty-three years of consulting experience working with more than 100 organizations. During that time, he has gained insight into grant challenges common to charitable organizations of all types, sizes, and stages of growth. One of the most confounding is the compilation and creation of specific information required for application submissions.

Creating such a case for support is complex and many employees of nonprofits lack the motivation or time to do so. Obstacles include lack of written strategic plans, delays in executive decision-making, weak

**STRATEGY PAPERS
COMMITTEE**

Joshua Einhorn, Ed.D.
Editor

Sean Kirby and
Joan L. Whitman, Ph.D
GPA Publications
Committee Co-Chairs

GPA Strategy Papers offer practical solutions to current and emerging issues facing grant professionals. The GPA Strategy Papers Committee accepts concept proposals on a quarterly basis and uses a double-blind peer review process.

Members and nonmembers may submit concept proposals and have electronic access to approved papers.

Articles in this publication represent the opinions and views of the author(s) only.

www.grantprofessionals.org

comprehension of evaluation and its terminology, insufficient investment in agency tools and human resources, and low prioritization of outcome measurement. The creation of a case requires skills far beyond good writing, a fact that few organizations recognize. There must be analysis of root causes, data research on challenges and solutions, creation of evaluation tools, lobbying to have leaders approve strategies, and more.

Grant professionals with little or no strategic orientation struggle in this endeavor. It is not simple to guide proposal reviewers through the logic of problems' root causes, documentation, measurement, and eradication. It often requires taking a current or envisioned service and converting it into a compelling, detailed argument. Grant applications lacking specificity can be stressful for grant professionals who may determine their best alternative is to "just abandon the proposal entirely" (Conn, 2013, p. 967).

The question for the author became, "*Is there an easier way to get details needed to write a strong proposal?*" A rigorous literature review could not identify a widely regarded method.

Dashboard Tool Creation

The development of the Dashboard to simplify compilation of details began with several factors in mind. Its function and language would be easily understood and appreciated by organization decision-makers and grant professionals alike. It would display key details required by grantmakers, but in a simple format, to be practical for broader use. It would provide a 'single point of truth' for organization personnel to view, approve, and visualize grant application content, avoiding the pitfalls of needing to sift through a variety of past proposals and reports. Finally, it would utilize software that most nonprofits already use and understand.

To easily work with numerical measures in a familiar milieu, a relatively concise grid was designed in a shareable spreadsheet. The consultant author field tested the Dashboard with his clients and the current format was developed (See Table 1 for an abridged version). The full template can be downloaded at link.communicationmark.com/dashboard.

STRATEGY PAPERS COMMITTEE

Joshua Einhorn, Ed.D.
Editor

Sean Kirby and
Joan L. Whitman, Ph.D
GPA Publications
Committee Co-Chairs

GPA Strategy Papers offer practical solutions to current and emerging issues facing grant professionals. The GPA Strategy Papers Committee accepts concept proposals on a quarterly basis and uses a double-blind peer review process.

Members and nonmembers may submit concept proposals and have electronic access to approved papers.

Articles in this publication represent the opinions and views of the author(s) only.

www.grantprofessionals.org

Table 1: Milestone Dashboard

Table 1: Milestone Dashboard

	A	B	C	D	E	F	G	H	I
1	ORGANIZATION NAME: ABC Organization								
2	FISCAL YEAR: 2023								
3		Previous FY, Actual Org. Totals	This FY, Projected Org. Totals	Training Programs	Training, Oaktown Project	Training, Pheville Project	Mentorship Programs	Mentorship, Oaktown Project	
4	Services - provided by program? (Yes/No)								
5	Student Support Services				X	X		-	
6	Mentorship				-	-		X	
7	Training Webinars				-	X		X	
8	Objectives - quantity accomplished by program								
9	# of Child Participants	75	85	70	50	20	15	15	
10	# of Schools Participating	10	12	7	5	2	5	5	
11	# of Volunteers	18	23	8	6	2	15	15	
12	# People of Color Served	36	46	37	32	5	9	9	
13	Outcomes - qualitative change by program								
14	# Receiving One Year of Guidance from Mentor	14	14	0	0	0	14	14	
15	# Approved for Scholarship	34	39	25	20	5	14	14	
16	\$ Amount Awarded in Scholarships	\$ 205,000	\$ 265,000	\$ 125,000	\$ 100,000	\$ 25,000	\$ 140,000	\$ 140,000	
17	Budgets								
18	Total Budget	\$ 408,000	\$ 445,000	\$ 265,000	\$ 180,000	\$ 85,000	\$ 180,000	\$ 180,000	
19	Amount of Budget Raised to Date		\$ 345,000	\$ 195,000	\$ 120,000	\$ 75,000	\$ 150,000	\$ 150,000	
20	Amount of Budget to Be Raised		\$ 100,000	\$ 70,000	\$ 60,000	\$ 10,000	\$ 30,000	\$ 30,000	

Lists of Services, Objectives, and Outcomes appear in rows down the left-hand side of the Dashboard.

Services—the activities provided for client benefit—concisely remind users of the features each proposed project provides, for description in the project methods portion of a grant application. Services listed for a workforce development nonprofit might include skills training, mentorship, job placement, and so on. The director of a small nonprofit shared with this author that having the Dashboard helped immeasurably on a site visit by a program officer from a foundation. The Dashboard provided a clear picture of objective measures of the project on which the director and the program officer could both converge.

Objectives follow, listing quantitative measures (e.g., number of child participants, schools participating, or people of color served) to share with grantmakers.

Outcomes are next, with those rows listing qualitative improvements such as how many clients will receive one-year mentorships or scholarships. A Dashboard user shared with this author that they “should know everything, but there is no way I can have all of these numbers in mind” (Urdiales, personal conversation, March 20, 2023).

Budgets appear across the bottom rows of the Dashboard to track anticipated one-year income and expenses. Determining these figures can surface another level of challenge for an organization: Is it implementing fund

**STRATEGY PAPERS
COMMITTEE**

Joshua Einhorn, Ed.D.
Editor

Sean Kirby and
Joan L. Whitman, Ph.D
GPA Publications
Committee Co-Chairs

GPA Strategy Papers offer practical solutions to current and emerging issues facing grant professionals. The GPA Strategy Papers Committee accepts concept proposals on a quarterly basis and uses a double-blind peer review process.

Members and nonmembers may submit concept proposals and have electronic access to approved papers.

Articles in this publication represent the opinions and views of the author(s) only.

www.grantprofessionals.org

accounting to keep its promises regarding grant allocation? The uncomfortable truth is that many nonprofits, particularly smaller or newer ones, struggle in this area. Such organizations should realize that this struggle is actually a growth opportunity. One group using the Dashboard initiated a series of conversations with its accounting contractor to remedy its budgeting.

Across the top of the Dashboard, columns list each stand-alone project for the year. An 'X' typed in each column indicates a Service provided to a project, and numbers or percentages estimate objectives and outcomes. Part of the exercise of breaking out each project into columns is to make sure there is no overlap between projects. For instance, the organizations completing the Dashboard frequently amended the number of people receiving services for each project because the side-by-side numerical comparisons made faulty guesses harder to miss. Similarly, totals for projects' combined number of service recipients frequently differed from agencies' overall projections of total individuals served. A column at the far-left of the Dashboard lists previous-year actual totals which further serves as a cross-reference point in case estimates vary more than anticipated from previous results.

Dashboard Method

This work proves its value as Dashboard users experience "aha" moments when measurable projects materialize. Most of the work occurs up front—in years that follow, the Dashboard can be updated prior to each fiscal year, or as needed. In the spirit of transparency embraced by its users, the author notes that the Dashboard typically takes several focused planning sessions to complete.

The typical method of introducing the Dashboard concept is for the grant professional to share an example of the template and discuss it with other team members. The grant professional will explain the Dashboard concept and terminology, along with the rationale for using it as a planning tool. The team will discuss grant-related and organizational challenges, then identify potential solutions by using the Dashboard tool. From there, the team will review how much time it will take to complete the Dashboard, as well as what organizational support different team members will need to complete their relevant sections of it.

The process of filling in the Dashboard typically begins with the grant professional completing as much as possible based on personal experience, past grant proposals, or currently known outcomes and objectives. During that process, the grant professional inserts comments on any unknowns or uncertainties that colleagues must help resolve.

**STRATEGY PAPERS
COMMITTEE**

Joshua Einhorn, Ed.D.
Editor

Sean Kirby and
Joan L. Whitman, Ph.D
GPA Publications
Committee Co-Chairs

GPA Strategy Papers offer practical solutions to current and emerging issues facing grant professionals. The GPA Strategy Papers Committee accepts concept proposals on a quarterly basis and uses a double-blind peer review process.

Members and nonmembers may submit concept proposals and have electronic access to approved papers.

Articles in this publication represent the opinions and views of the author(s) only.

www.grantprofessionals.org

When the grant professional can go no further, the Dashboard draft is distributed to team members with the knowledge to advance it. Meetings may be scheduled to work together on the Dashboard and facilitate this process. A complete list of Services is subjectively identified, with enough details to be instructive to the grant professional (usually 10 or so), but not so many as to mire the process in minutiae. Next, Objectives are listed (often about 15-25). Next listed are Outcomes (sometimes just a handful, other times more if the organization is large or complex).

During meetings with co-workers, the grant professional highlights feedback needed and reinforces the benefits of the Dashboard. The idea is to capture data that must appear in a grant application, while designing measurements with consideration for team members who require, gather, and report on data (Cunningham, 2020, p. 50). Questions or issues often arise. For instance, team members may debate whether to list certain services individually or to bunch them together. Some Objectives may require clarification—for example, if a service is intended for children, the grant professional may ask colleagues to define which ages will be served. The grant professional ends each meeting by reviewing tasks colleagues pledged to complete by the next meeting. The Dashboard ideally resides in a shared drive (i.e., the cloud), enabling the team to easily share and also communicate about edits.

The author encourages the addition of project Budget data to the Dashboard after other rows are complete. The budget rows allow a grant professional to work with finance personnel to forecast accurate line items and per-client costs, increasing efficiency. The Dashboard can track the amount raised toward each project as the year progresses.

Case Studies

While it is still new and its Budget feature needs further testing, the Dashboard resolves many problems. Services, previously explained as continuing endlessly, are timely and compelling, understood by grant reviewers, and logically address a relevant challenge. Two case studies follow that illustrate the Dashboard's effectiveness.

- Before using the Dashboard, a California organization requested support to raise an undefined amount for scholarships to graduate medical students with a goal of ameliorating the county's shortage of health professionals. In using the Dashboard, the organization recognized that it could arrive at a quantifiable number of scholarships needed to address the health professional shortage. Its staff agreed that this was more compelling than asking for funds with a random goal or with no end in sight.

**STRATEGY PAPERS
COMMITTEE**

Joshua Einhorn, Ed.D.
Editor

Sean Kirby and
Joan L. Whitman, Ph.D.
GPA Publications
Committee Co-Chairs

GPA Strategy Papers offer practical solutions to current and emerging issues facing grant professionals. The GPA Strategy Papers Committee accepts concept proposals on a quarterly basis and uses a double-blind peer review process.

Members and nonmembers may submit concept proposals and have electronic access to approved papers.

Articles in this publication represent the opinions and views of the author(s) only.

www.grantprofessionals.org

• A grassroots organization in North Carolina began to more fully appreciate evaluation as it conceived of objectives and outcomes. In this case, however, even its completion of the Dashboard did not explain how to implement measurement. To address that need, the grant professional added more columns to the right of the Dashboard so that for each Objective and Outcome, specifying the tool used to capture data, the software the data would be entered into, the person responsible for evaluation, and how frequently the data would be reported. This organization is still working with the author to put evaluation systems into practice, and the organization is now illustrating to funders that it needs more capacity to truly measure impact. The organization's Program Director presented the Dashboard during a foundation site visit, without a grant professional present, and had resounding success. She relayed that the Dashboard was "a translator" allowing her to communicate in the funder's language. The program officer was impressed and told the Program Director, *"I like the way you think!"* (Urdiales, personal conversation, March 20, 2023).

Recommendations

In field testing, the author and his colleagues have used the Dashboard sufficiently to show its efficacy in turning vague or ongoing services into compelling, time-specific projects. With razor-sharp precision, the Dashboard helps personnel clarify and document project measurement, helping nonprofit organizations visualize what project expansions can bring. The author recommends further development to increase ease of use, such as more easily adjustable formatting, and creation of a concise user guide. A more consistent timeline for completing the Dashboard is recommended. At present, the process has mostly been implemented at a casual pace which reduces the stress of the planning process, but jeopardizes timely Dashboard completion.

Conclusion

The Dashboard has helped grant professionals with the challenge of translating services into fundable projects and holds great potential for broader use. For this to occur, it should be shared more widely, improving its effectiveness as it is tested more broadly and rigorously.

**STRATEGY PAPERS
COMMITTEE**

Joshua Einhorn, Ed.D.
Editor

Sean Kirby and
Joan L. Whitman, Ph.D.
GPA Publications
Committee Co-Chairs

GPA Strategy Papers offer practical solutions to current and emerging issues facing grant professionals. The GPA Strategy Papers Committee accepts concept proposals on a quarterly basis and uses a double-blind peer review process.

Members and nonmembers may submit concept proposals and have electronic access to approved papers.

Articles in this publication represent the opinions and views of the author(s) only.

www.grantprofessionals.org

References

Conn, V.S. (2013). Welcome to the dark side of grant writing. *Western Journal of Nursing Research*, 35(8), 967–969.

Cunningham, K. (2020, Fall). Beyond boundaries: Developing grant writing skills across higher education institutions. *The Journal of Research Administration*, v51 n2 41-57.

Biographical Information

Mark Goldstein, CFRE, is the President/CEO of Communication Mark, a grant writing firm at www.communicationmark.com, and the originator of an Open Communication Fundraising Model that enables organizations to work cooperatively toward community and fundraising goals. He developed the Dashboard and is President of the GPA North Carolina Chapter.