



Dashboard Reporting – Important Considerations for Ministries

Matthew Branaugh & Vonna Laue

October 11, 2022

Today's Presenters



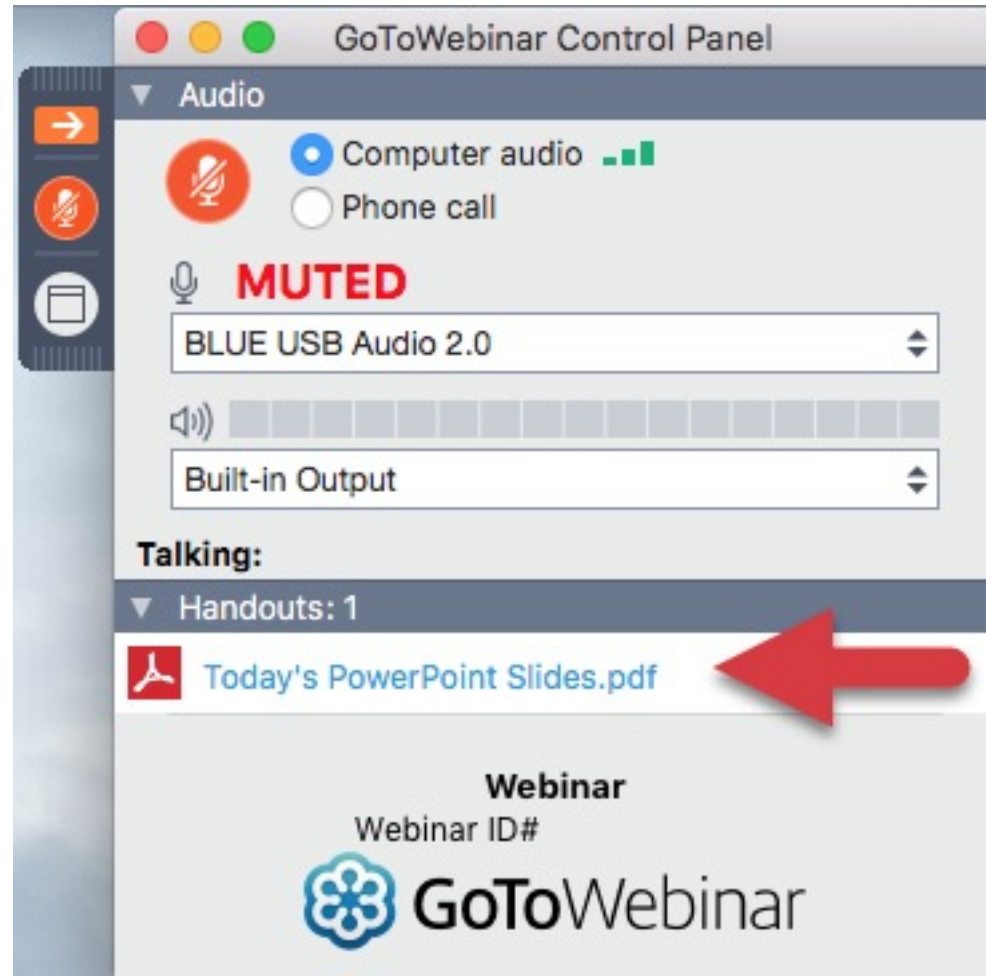
Matthew Branaugh



Vonna Laue

PowerPoint Slides

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Agenda

- Why?
- What?
- How?
- Risk to good results



Why?

- Different audiences need different information
- Communicate effectively with people that process information differently
- Recognize that many people may struggle with financial information that is just numbers
- Keep the most important information visible
- Very effective use of time



What?

- Information must be aligned with mission and vision and corresponding goals
- Both financial and nonfinancial data – what would be relevant in your church?
- Trends are important

How?

- Use graphs
- Consider color coding
- Make it succinct
- Don't let it be cluttered
- Remember, just because you can do something doesn't mean you should

How?

- Utilize Excel or a specific program
- Re-evaluate consistently and be sure the users are providing input

Brainstorm & Sample



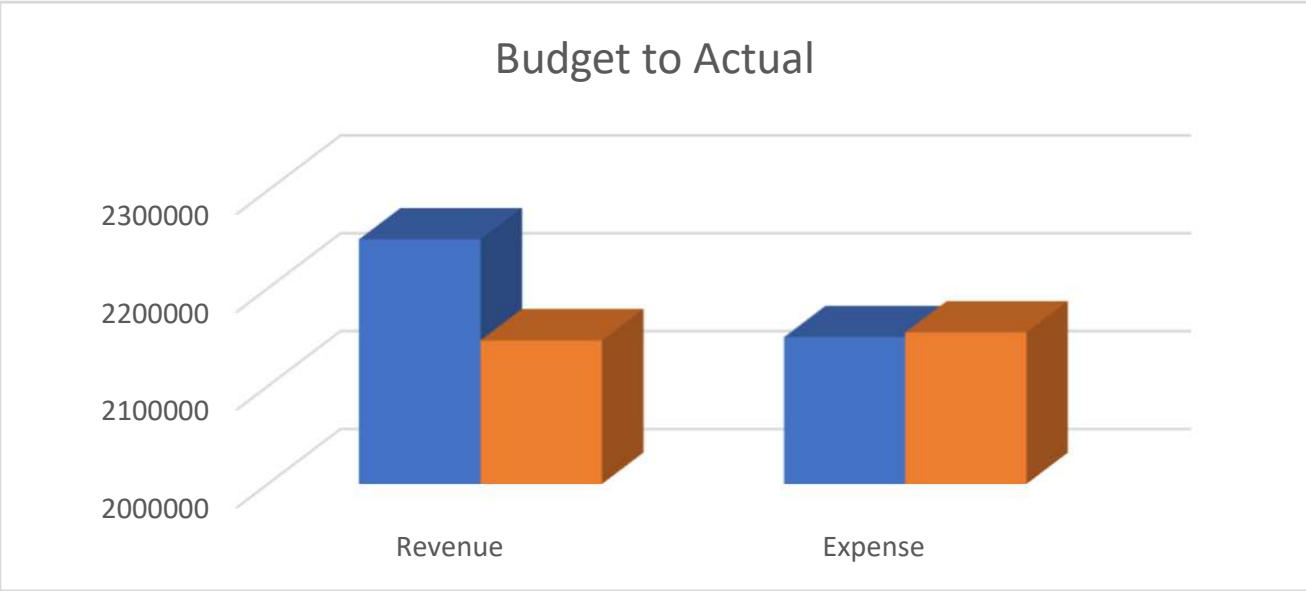
ABC Church

Cash Availability

Cash	\$ 43,257
Liabilities	(6,935)
Restricted	<u>(14,876)</u>
Available	<u><u>\$ 21,446</u></u>

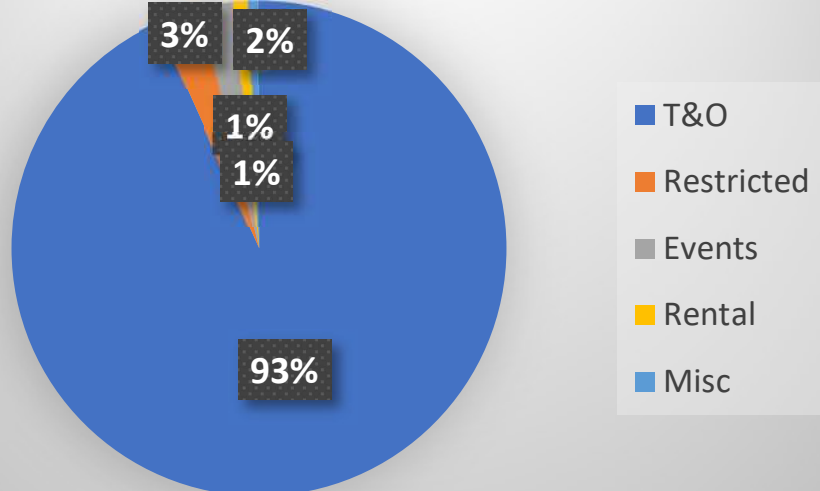
Statistical Data

- 21 Decisions
- 32% Life Group participation
- 712 Counseling hours
- 6450 Community volunteer hours

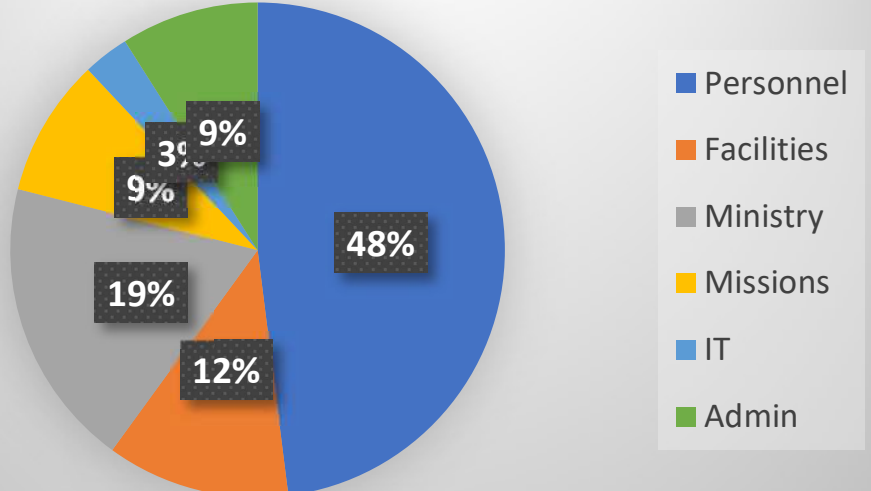


ABC Church (cont.)

Revenue Categories

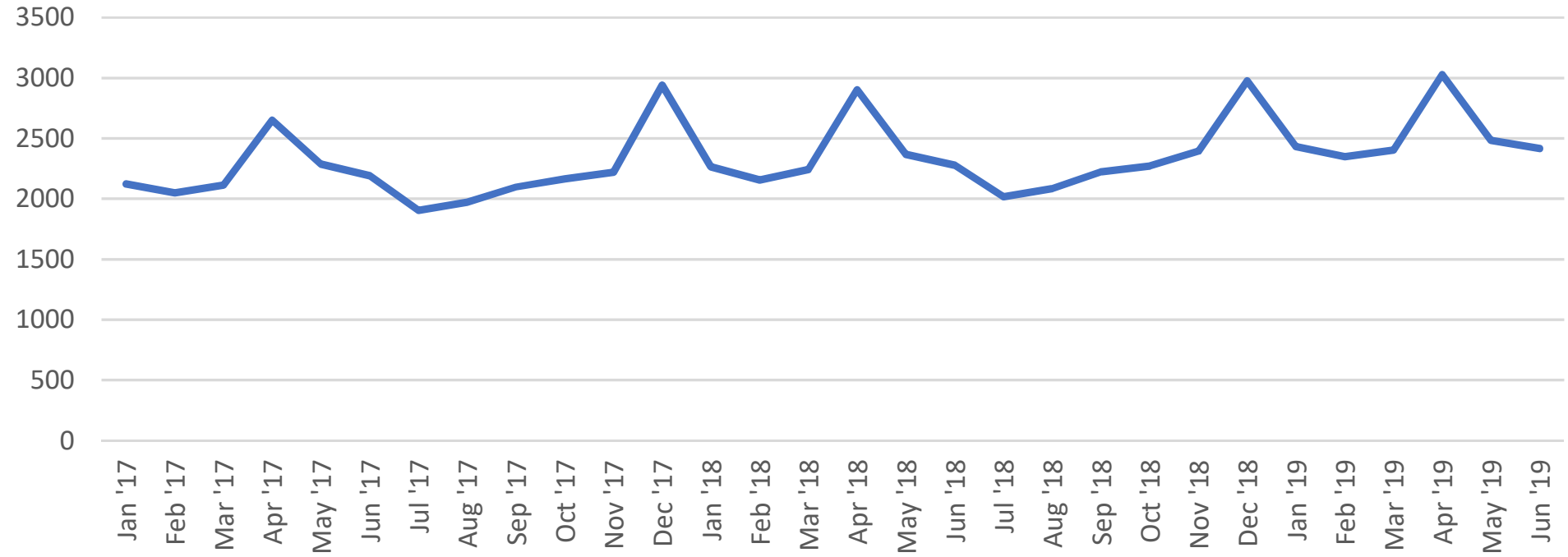


Expense Categories



ABC Church (cont.)

Attendance



ABC Ministry

August 2022 Dashboard

Balance Sheet:

Cash	\$	245,023
Investments		50,000
Prepaid expenses		23,575
Other assets		12,450
Fixed Assets		1,671,851
Assets held in trust		1,703,992
	\$	<u>3,706,890</u>

Accounts payable	\$	22,718
Accrued expenses		56,722
Amounts held for others		225,000
Trust and annuities		783,011
Temporarily Restricted		457,849
Board Designated		2,161,591
	\$	<u>3,706,890</u>

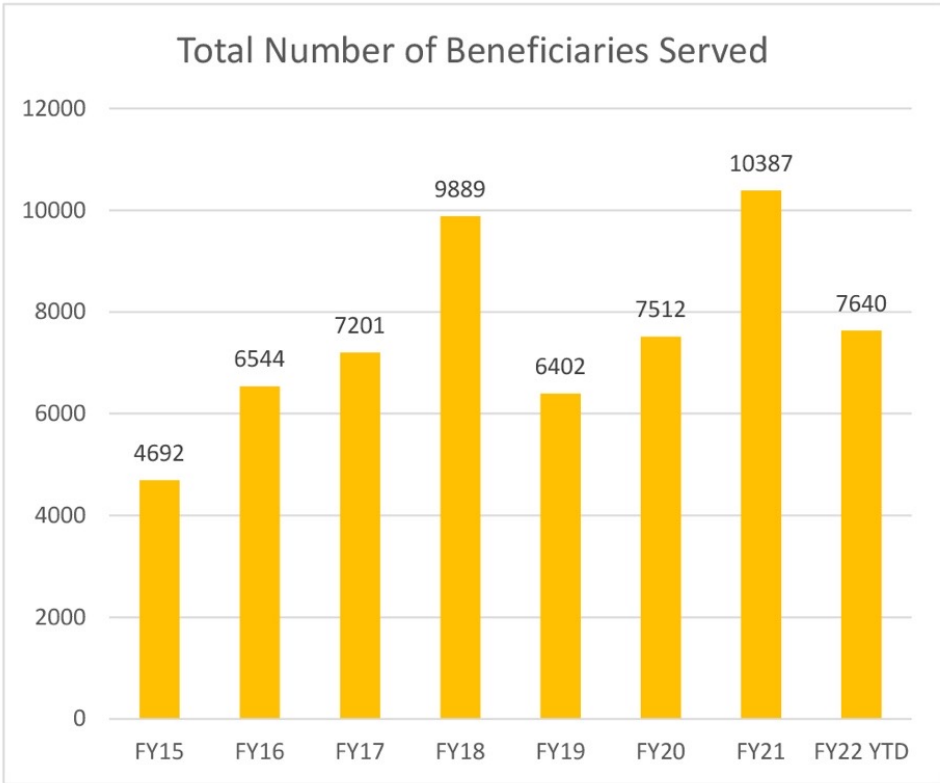
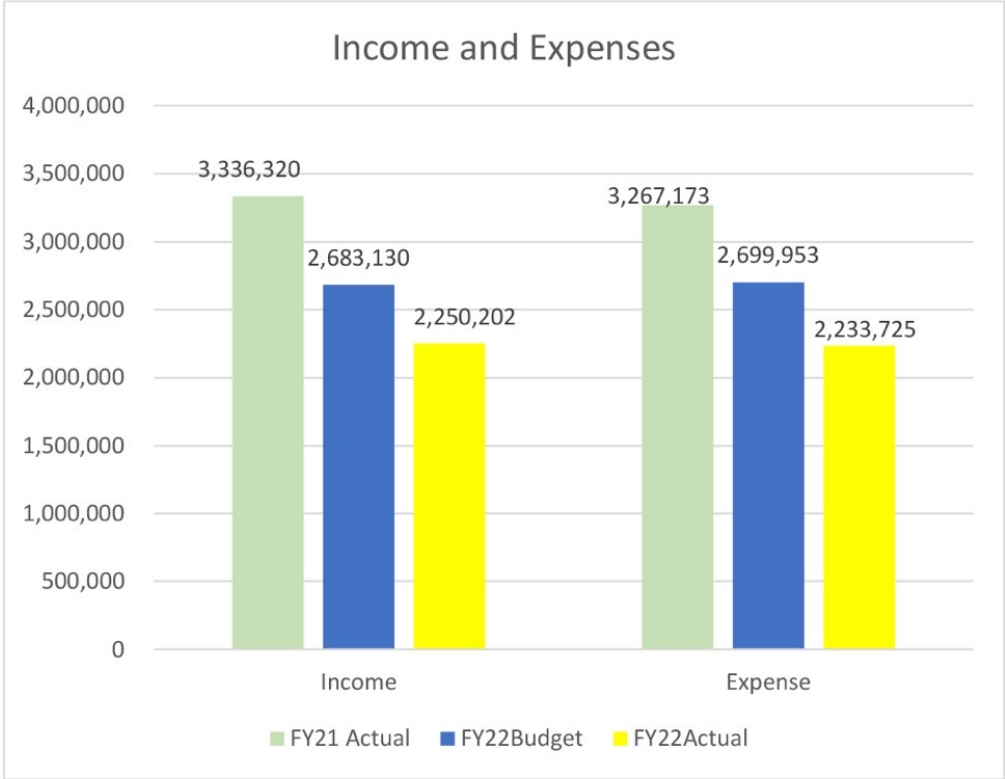
2022 YTD Actual Net Income - \$16,477
 2022 YTD Budgeted Loss - \$(16,823)
 2022 YTD Actual Net Income - \$69,147

Beneficiary count:

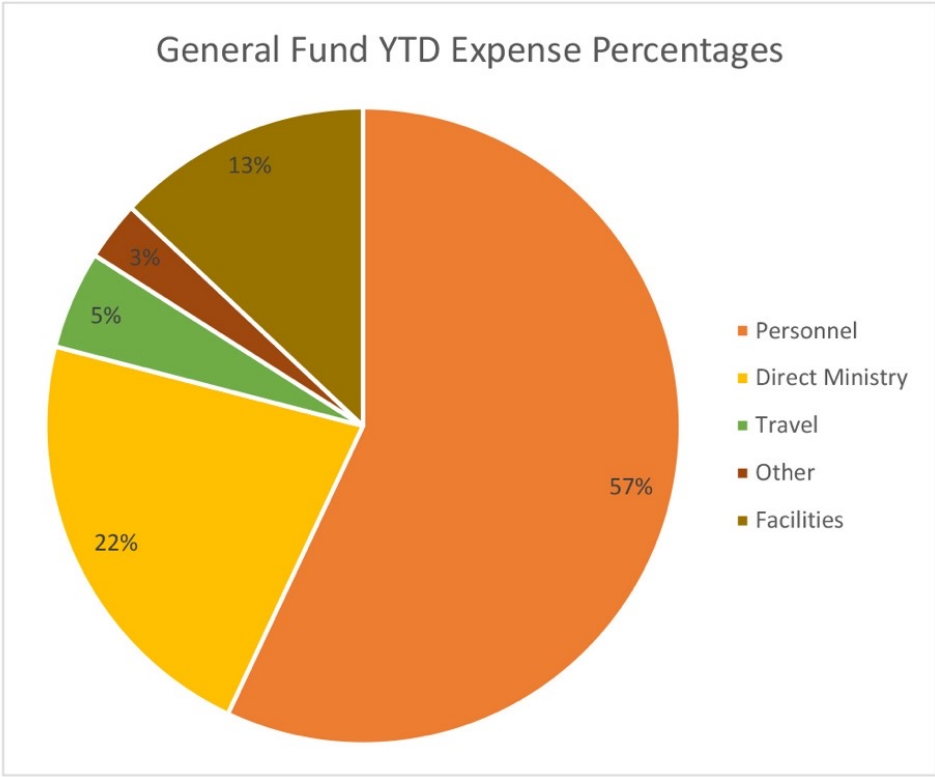
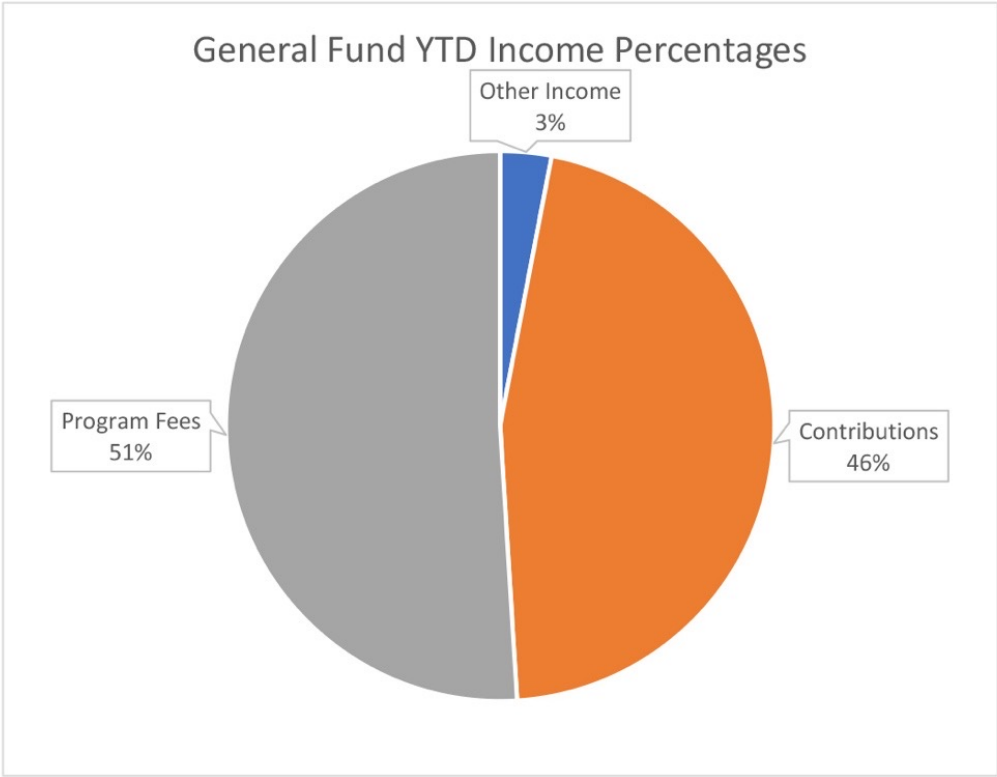
Program A	1728
Program B	<u>3575</u>
	<u>5303</u>
Site 2	1892
Site 3	<u>445</u>
	<u>2337</u>



ABC Ministry (cont.)

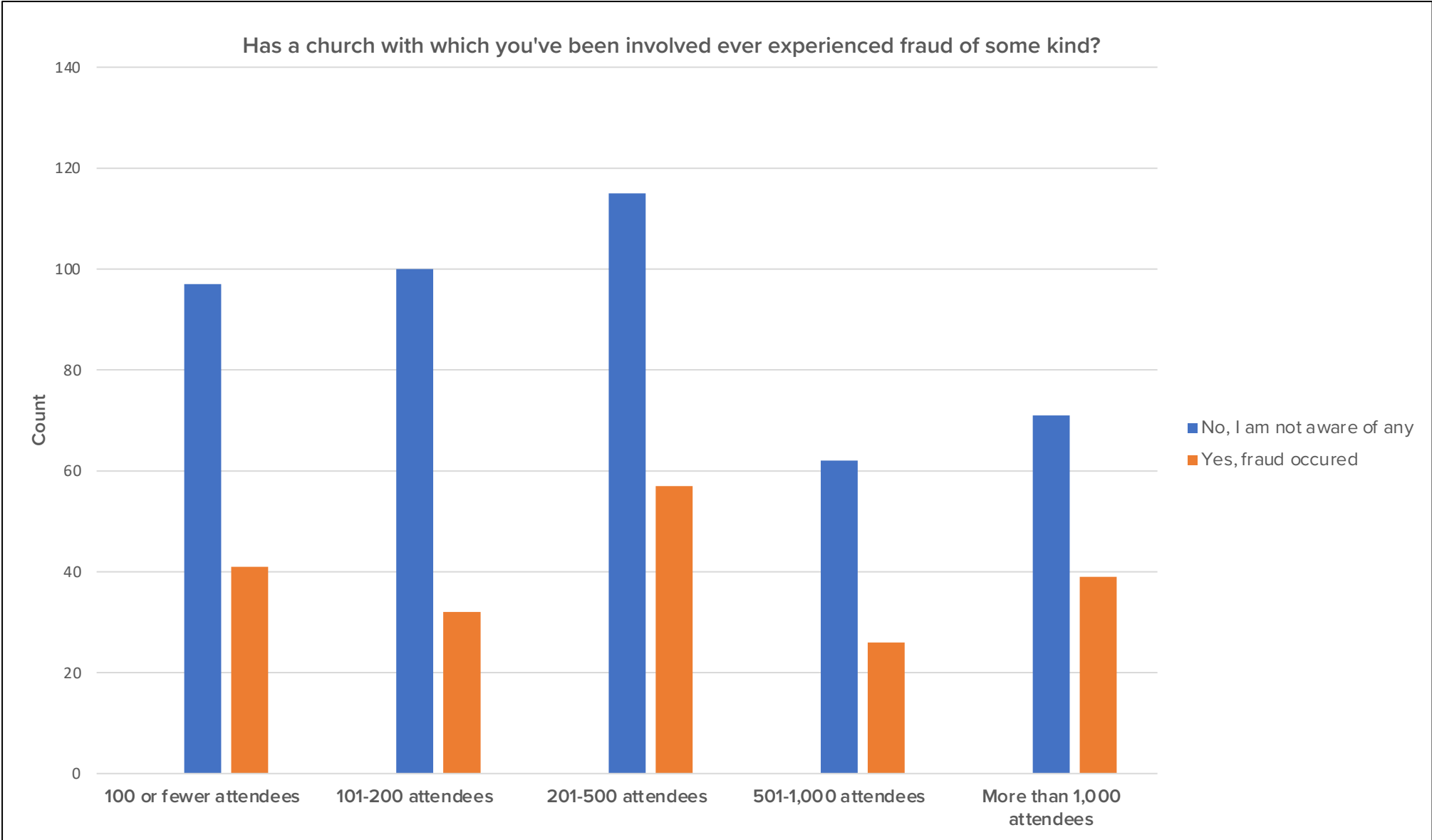


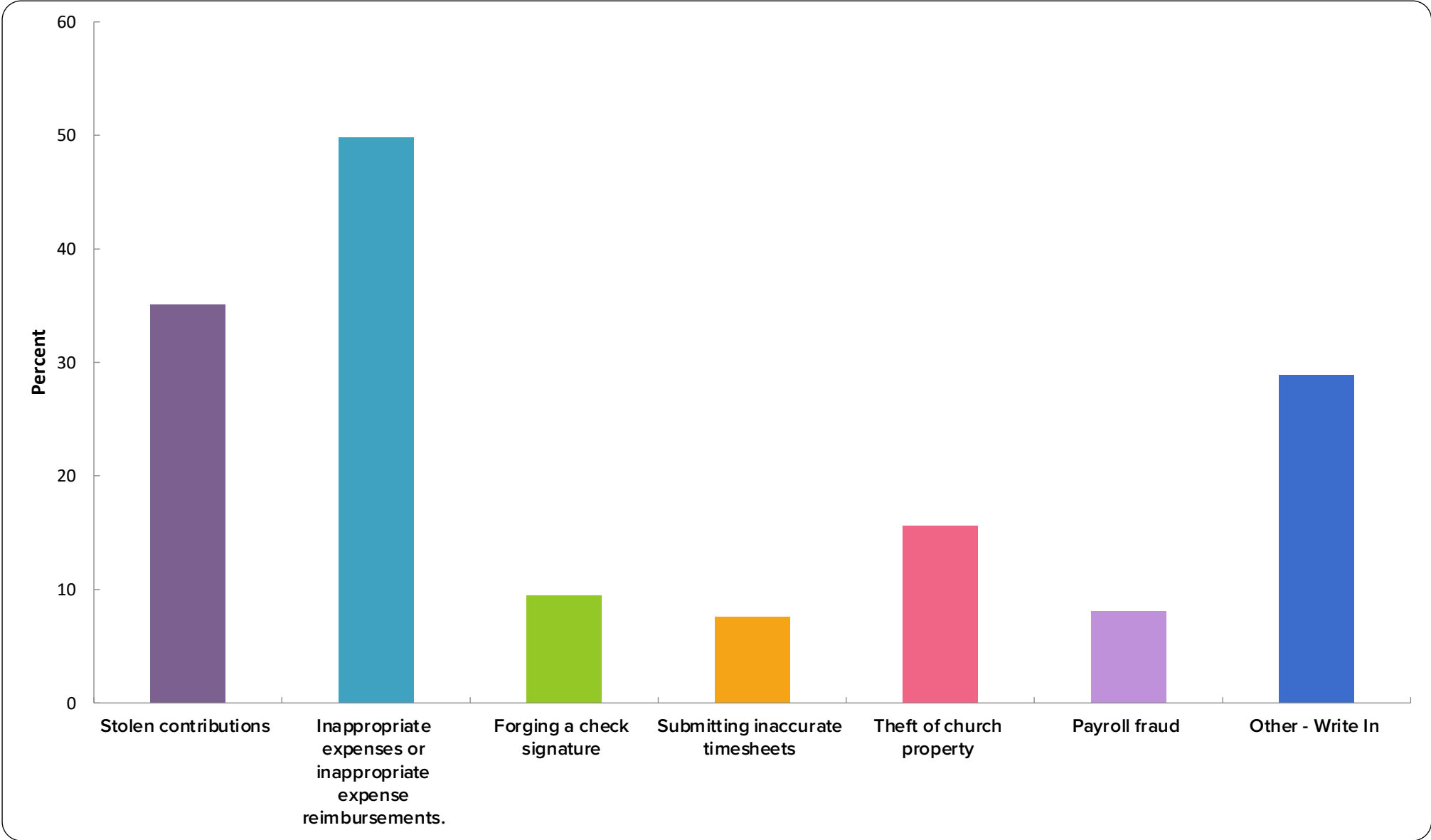
ABC Ministry (cont.)

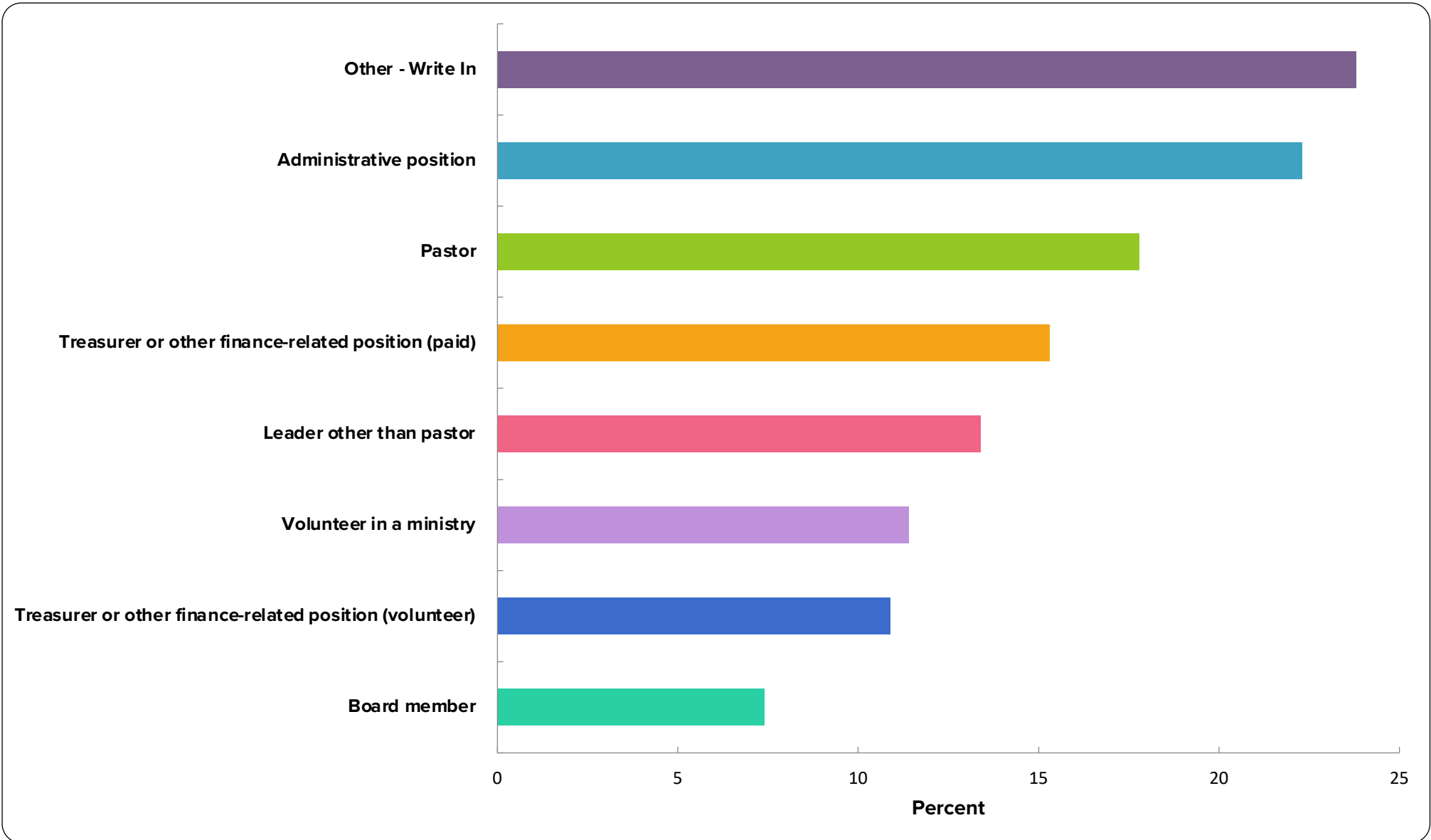


Risk to Good Results

FRAUD







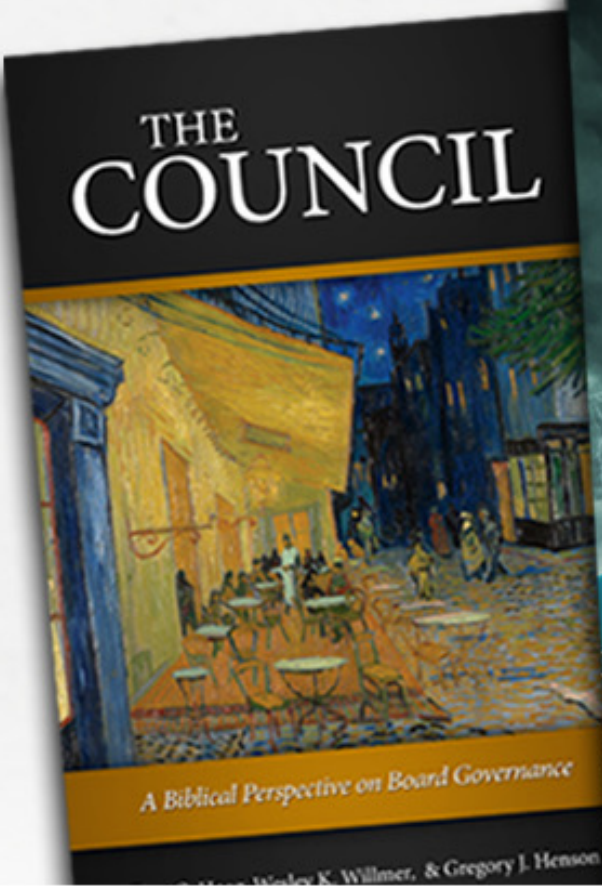
Value	Percent	Count
Less than \$10,000	40.3%	85
\$10,000-\$49,999	23.7%	50
\$50,000-\$99,999	6.2%	13
\$100,000-\$250,000	7.1%	15
More than \$250,000	7.1%	15
I don't know.	15.6%	33



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