

DATA VISUALISATION GUIDE

Impact Dashboard Design for NGOs

A Comprehensive Guide to Designing Dashboards That Demonstrate
Impact to Funders, Boards, and Stakeholders

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| AmplifyData.org.nz

Dashboard Design

Data Visualisation

Power BI

Impact Measurement

Board Reporting

NZ & Australia

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From design principles to technical implementation and tool selection

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Impact dashboards matter and who this guide is for

Why Impact Dashboards Matter for NGOs

In today's accountability-focused environment, not-for-profit organisations need more than spreadsheets and annual reports to demonstrate their impact. Stakeholders -- from funders to boards to the communities you serve -- expect clear, visual evidence of the difference your organisation makes.

The Challenge

- Funders require evidence-based reporting
- Boards need real-time oversight
- Staff want to see the impact of their work
- Donors expect transparency and accountability
- Regulators increasingly focus on outcomes

The Solution

- Clear visual representation of impact
- Real-time or regular data updates
- Accessible to diverse stakeholders
- Actionable insights for decision-making
- Compelling storytelling through data

Who This Guide Is For

- **Programme managers** tracking and reporting outcomes
- **CEOs and leadership** communicating with boards and funders
- **Data and evaluation staff** building reporting systems
- **Communications teams** telling impact stories
- **Board members** overseeing organisational performance
- **Fundraisers** demonstrating value to donors

The NZ/AU Context

New Zealand

- 27,000+ registered charities with reporting requirements
- Increasing focus on outcomes under Charities Act
- Social Services Accreditation requiring outcome evidence
- Te Tiriti considerations in data presentation

Australia

- 60,000+ ACNC registered charities
- Outcomes-based commissioning in human services
- Data Exchange (DEX) platform for government contracts
- Closing the Gap reporting for Indigenous programmes

The 10 Principles of NGO Dashboard Design

Principles for dashboards that inform, inspire, and drive action

1 Start with Your Story

Your dashboard should tell a story about the change your organisation creates: the context (the need), the response (what you do), the change (the difference you make), and the evidence (how you know).

2 Know Your Audience

Different stakeholders need different information at different levels of detail.

| AUDIENCE | PRIMARY INTEREST | DETAIL LEVEL | FREQUENCY |
|----------|-----------------------------------|--------------------|----------------|
| Board | Strategic outcomes, trends, risks | High-level summary | Quarterly |
| Funders | Accountability, value for money | Specific to grant | As required |
| Staff | Operational data, caseloads | Detailed | Weekly/Monthly |
| Donors | Impact stories, reach | Simple, visual | Annually |
| Public | Transparency, mission | Very simple | Annually |

3 Less Is More

The "5x5" Rule: Maximum 5 key metrics per dashboard, maximum 5 charts per view. If more detail needed, use drill-down views. Every element must earn its place.

4 Design for Action

Every dashboard should answer: "What should I do next?" Use traffic lights, trend arrows, thresholds, and comparisons to guide decision-making.

5 Balance Outputs and Outcomes

Show both what you did (outputs) and what changed (outcomes). Outcomes are the primary focus -- what funders care most about.

INPUTS

Resources

OUTPUTS

What we delivered

OUTCOMES

Primary Focus

IMPACT

Broader change

Principle 6: Use Appropriate Visualisations

- **Comparison:** Bar charts, grouped bars
- **Trends:** Line charts, area charts
- **Parts of whole:** Stacked bars, donut (2-4 categories)
- **Avoid:** 3D pie charts (always)

Principle 7: Ensure Data Quality

- Data validated at source and calculations verified
- "As of" date clearly displayed
- Data sources noted, methodology documented
- Limitations acknowledged

Principle 8: Design for Accessibility

- Don't rely on colour alone; use patterns or labels
- Minimum 12pt font for body text
- Te Reo Maori options where appropriate
- Keyboard navigable for digital dashboards

Principle 9: Build for Sustainability

- Choose tools your team can use
- Document data sources and formulas
- Define update responsibilities
- Plan for staff turnover

10 Iterate and Improve

Your first dashboard won't be perfect. Launch a minimum viable dashboard, gather feedback, analyse usage, refine, and repeat on a quarterly cycle.

Understanding Your Dashboard Audiences

g dashboards for boards, funders, staff, and donors

Board of Directors/Trustees

What Boards Need

- Strategic outcomes: Are we achieving our mission?
- Trends: Are things improving or declining?
- Risks: What requires governance attention?
- 1-2 page dashboard maximum, traffic light indicators, quarterly updates

Funders and Grant Acquittal

What Funders Need

- Accountability: Did you do what you said you'd do?
- Value for money: Was the investment worthwhile?
- Outputs delivered vs contracted, outcomes achieved vs targets
- Participant voice/qualitative evidence, budget utilisation

Programme Staff and Teams

What Staff Need

- Caseload data, participant progress, workload tracking
- Action-oriented: who needs follow-up
- More detailed, real-time, filterable by worker/region/programme
- Alerts for exceptions

Donors and Public

What Donors Need

- "Your donation helped..." framing with big, bold numbers
- Real participant stories (with consent)
- Simple, visual, mobile-friendly, shareable on social media
- Clear call to action

Essential Metrics for NGO Dashboards

Metrics framework: reach, delivery, change, and efficiency

Reach and Engagement Metrics

| METRIC | DEFINITION | DASHBOARD DISPLAY |
|------------------|---------------------------------------|------------------------|
| Total Served | Unique individuals receiving services | Big number with trend |
| New Participants | First-time service users | Bar chart by month |
| Demographics | Age, gender, ethnicity breakdown | Stacked bar or table |
| Engagement Rate | Active vs inactive participants | Percentage with target |
| Completion Rate | Participants completing programme | Percentage with trend |
| Waiting List | Unmet demand | Number with wait time |

Output and Outcome Metrics

| CATEGORY | METRIC EXAMPLES | MEASUREMENT |
|-----------------------------|---|---------------------|
| Short-Term Outcomes | Knowledge gain, skills development, confidence change | Pre-post assessment |
| Medium-Term Outcomes | Behaviour change, employment gain, housing stability | Follow-up survey |
| Long-Term Outcomes | Sustained change, wellbeing improvement, independence | 12+ month follow-up |

Efficiency Metrics

| METRIC | CALCULATION | DISPLAY |
|----------------------|--------------------------------|---------------|
| Cost per Participant | Total cost / Participants | Dollar figure |
| Cost per Outcome | Total cost / Positive outcomes | Dollar figure |
| Staff Utilisation | Direct service / Total hours | Percentage |
| Volunteer Leverage | Volunteer hours x Rate | Dollar value |

Dashboard Types and Templates

ive, programme, funder acquittal, and annual report dashboards

Executive Dashboard

Structure

- **Header:** Organisation name, period, "as of" date
- **Headline metric:** One big number that captures overall impact
- **Strategic outcomes:** 3-5 max with status indicators
- **Trend visualisation:** Key metrics over time
- **Key insights:** 2-3 sentences on what the data means

Programme Dashboard

Key Components

- Participant pipeline: Referrals > Intake > Active > Completing > Completed
- Output delivery vs targets with progress bars
- Outcome achievement with traffic lights
- Participant feedback: satisfaction score, NPS, recommendation rate
- Key issues and actions

Funder Acquittal Dashboard

Essential Elements

- Grant reference, funder name, period, and amount
- Contracted outputs: target vs delivered vs % achieved
- Contracted outcomes: target vs achieved with evidence source
- Expenditure breakdown: approved vs spent vs variance
- Participant demographics and de-identified case study

Visual Design Best Practices

Selection, colour, layout, and typography for effective dashboards

Chart Selection Guide

| QUESTION TYPE | BEST CHART | AVOID |
|----------------------------|---------------------------------------|-------------------------------------|
| How do things compare? | Bar chart, grouped bar | Pie charts with 4+ segments |
| How have things changed? | Line chart, area chart | Bar charts for many time periods |
| What's the breakdown? | Stacked bar, donut (2-4 categories) | 3D pie charts (always) |
| What's the current status? | Big number card, gauge, traffic light | Complex charts for simple questions |

Colour Best Practices

Colour Principles

- Consistent meaning: green = good, red = attention, amber = caution
- Limit palette to 3-5 colours maximum
- Ensure WCAG AA contrast (4.5:1)
- Don't rely on colour alone -- add patterns or labels

Colourblind-Safe Combinations

- Good: Blue + Orange
- Good: Blue + Yellow
- Good: Purple + Yellow
- Avoid: Red + Green (most common issue)

Layout Principles

Visual Hierarchy

Place the most important information at the top-left (largest). Users scan in a "Z" pattern. Use generous white space and group related items together. Sans-serif fonts (Arial, Calibri, Roboto) at 14-18pt body, 24-32pt headlines, 12pt minimum for labels.

Tool Selection

ing between Power BI, Google Looker Studio, Tableau, and spreadsheets

Tool Comparison

| FEATURE | POWER BI | GOOGLE LOOKER STUDIO | TABLEAU | EXCEL/SHEETS |
|-------------------------|---------------------------------|----------------------|------------------|--------------|
| Cost | Free (desktop), \$10-20/user/mo | Free | \$70/user/mo | Low/Free |
| Ease of Use | Medium | Easy | Medium-Hard | Easy |
| Data Connections | Extensive | Good (Google focus) | Extensive | Limited |
| NGO Discounts | Yes | Free | Yes | Yes |
| Best For | Microsoft shops | Google shops | Complex analysis | Small orgs |

Getting Started with Power BI

1 Get Power BI Desktop

Download free from microsoft.com/powerbi. No account needed for desktop.

2 Connect Your Data

Get Data from Excel/CSV/Database. Load participant and outcomes data.

3 Build Visualisations

Select chart types, drag fields, format colours and labels.

4 Design Your Dashboard

Arrange visualisations, add text boxes, create multiple pages for drill-down.

5 Share Your Dashboard

Publish to Power BI Service (Pro), export to PDF, embed in SharePoint.

Getting Started with Looker Studio

Benefits for NGOs

- Completely free with no cost for any features
- Web-based -- no software to install, works anywhere
- Easy sharing with a link, no accounts needed to view
- Real-time updates, always shows latest data
- Native connection to Google Sheets, Forms, and Analytics

Decision Framework

Choose Power BI If...

- Your organisation uses Microsoft 365
- You need complex data modelling
- You want automatic data refresh
- You have a Windows environment

Choose Looker Studio If...

- Your organisation uses Google Workspace
- Budget is a primary concern
- You need easy web-based sharing
- Your data is in Google Sheets

Building Your First Dashboard

Practical step-by-step implementation guide

Planning Phase

1 Define Your Purpose

Who is the audience? What decisions will it support? What story should it tell?

2 Select Key Metrics

Choose 3-5 metrics that matter most. Ensure you can measure them with available data.

3 Prepare Your Data

Clean, consistent column headers. Dates in standard format. Avoid merged cells.

4 Sketch the Layout

Paper sketch before digital. Place headline metrics at top, supporting detail below.

5 Build, Test, Refine

Start with minimum viable dashboard. Gather feedback. Iterate quarterly.

Power BI Template for NGO Outcomes

Page 1: Executive Summary

- Card: Total served (YoY comparison)
- Card: Key outcome % (target indicator)
- Line chart: Monthly participants trend
- Donut: Programme breakdown

Page 2: Programme Detail

- Slicer: Programme filter
- Bar chart: Output delivery vs target
- Gauge: Outcome achievement
- Table: Participant details

Page 3: Participant Insights

- Bar chart: Demographics breakdown
- Map: Geographic distribution
- Bar chart: Referral sources

Page 4: Trends

- Line chart: 12-month trend
- Table: Month-over-month comparison
- Area chart: Cumulative reach

This guide is provided as a general resource to support not-for-profit organisations in Aotearoa New Zealand and Australia.