

Template Training Tuesday: Quarterly Dashboard



30 March 2021



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Overview

- 1. Welcome**
- 2. What is a Quarterly Dashboard?**
- 3. Why should God's workers use it?**
- 4. How can you adapt it to your organization?**
- 5. What if you used it? (Testimony)**
- 6. Q & A**
- 7. Wrap-up**



What is a Quarterly Dashboard?

It's a one-page document with five sections.

- 1. Checklist of compliance items since the last meeting**
- 2. Provision**
- 3. Partnership**
- 4. Program**
- 5. Prayer**



*"Yet I am always with you;
you hold me by my right hand."
Psalm 73:23*



Progress in Q2

October to December 2019

- ✓ Hosted inaugural GTP Global Gathering in Dubai
- ✓ Collaborated with The Provisum Group to file 990 by 15 November 2020
- ✓ Appointed legal counsel and initiated comprehensive review and risk assessment in 2020
- ✓ Completed drafts of Updated Board Policies Manual, Privacy Policy, Giver Privacy Policy, Whistleblower Policy, Board Selection Process and Interview Template, Board Zoom Meeting Evaluation Form, Resource Development Plan for 2020, and External Review / Program Strategy Timeline
- ✓ Applied for directors and officers, kidnap and ransom, general liability, and medical travel insurance and it's still in underwriting



Provision

- ▶ Learned that God has supplied a \$000,000 capacity building grant from a private foundation that will come to GTP in January 2020
- ▶ Received \$000,000 private charitable trust grant for 2020 efforts among other Q2 (year-end) gifts
- ▶ Initiated due diligence on a property gift offered to GTP and, if accepted, the gift will pay out over \$0,000 annually to GTP
- ▶ Finished 2019 with \$00,000 on the balance sheet



Partnership

- ▶ Met with executive from two major foundation to discuss proposals
- ▶ Wrote \$000,000 foundation proposal to fund IAS 2020 in location TBD in October 2020
- ▶ Launched GTP website on 11 December 2019 and sent Journal Entry #1 and #2 emails to 0,000+ people in 00 countries in our Global Network with open rates of 00.0% and 00.0% respectively
- ▶ Locked down plan for fourth ECFA Press book, *The Seal: Preserving God's Honor with Standards and Peer Accountability* by Gary Hoag, Dan Busby, and Steve Kerr



Programs

- ▶ Visited CCCC in Canada in November 2019 to build relationships and learn about their programs as a model for other countries
- ▶ Celebrated the accreditation of the 6 founding NABLA members for Egypt, trained 40 workers with Generous Church *Overflow* resources (translated into Arabic), and trained another 20 workers to grow local giving
- ▶ Finished Journey of Empowerment (JOE) participants book 2.0 for piloting in India, El Salvador, and Guatemala in Q3
- ▶ Delivered teaching programs to 704 people from 35 countries in 7 countries in Q1-Q2
- ▶ Scheduled Q3 webinars with Lausanne YL Gen (Young Leaders Generation) Group and Lausanne YL Gen Board and Strategic Leadership group



Prayer

- ▶ Safety, spiritual growth, favor for GTP staff, regional facilitators, and board
- ▶ God's provision from individuals and foundations to fund ongoing GTP efforts and IAS 2020
- ▶ Next GTP hire: the right person to serve in an administrative role for GTP
- ▶ Fruitful service in El Salvador, Guatemala, Indonesia, South Korea, and Egypt in Q3

What is a Quarterly Dashboard?

PROGRESS: COMPLIANCE ITEMS

- Often the board secretary who keeps the minutes reminds the CEO of these items one month before the next meeting.
- They are past tense statements to show completed items or progressive tense statements if staff is working on it.



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What is a Quarterly Dashboard?

PROVISION

- **Summary of God's supply for ministry in the quarter.**
- **Mentions work by key staff members.**
- **Gives high-level financial overview.**
- **Links to Financial Snapshot (TTT on 4 May).**



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What is a Quarterly Dashboard?

PARTNERSHIP

- Review of faithful activities done to engage others.
- Mentions communication efforts, and honors staff work.
- Links to the Partnership Calendar and Website & Social Media Analytics Report (TTT on 18 May & 1 June).



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What is a Quarterly Dashboard?

PROGRAMS

- Features CEO and/or key program staff.
- Looks back on programs with qualitative and quantitative analysis as well as feedback.
- Looks ahead with areas to work on in next quarter.
- Links to Program Report (TTT on 27 April).



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What is a Quarterly Dashboard?

PRAYER

- **List of items for the board to lift up in prayer between meetings.**
- **Lists items for the board to give ongoing thanks for.**



Prayer

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Why should God's workers use it?

- **Boards generally prefer short and concise reports. A one-page Quarterly Dashboard and one-page committee reports increase the likelihood board members will read it.**
- **It positions committees and full board to actively discuss strategic and generative items rather than to passively sit and listen to reports (e.g., Philippines).**



Why should God's workers use it?

- It is easy to create using a template.
- It helps the board understand the time and effort the staff exerts between meetings, and the staff understand board processes.
- For boards to perform their governance role, the staff must provide reports of faithful activities, as well as fruits or outcomes. This links to the plan of faithful activities for the year, the 3D (TTT on 13 April).



Why should God's workers use it?

- It helps the board stay focused and engaged with staff in the work. (e.g., India)
- It makes meetings shorter.
- It focuses the board on strategic issues rather than reporting.
- It keeps the board focused on governance and not administration (e.g., Egypt).
- It shows us how to PRAY.



How can you adapt it to your organization?

1. Read through the template

- Brainstorm how it would look for your organization.
- Mark what you like and what you want to change.

GLOBALTRUST PARTNERS **DASHBOARD** Q3 2020
JANUARY 2020 BOARD MEETING

"Yet I am always with you; you hold me by my right hand."
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How can you adapt it to your organization?

2. Adapt the template as needed

- Change it to fit your organization.
- Match sections to your committees.



GLOBALTRUST PARTNERS

DASHBOARD

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How can you adapt it to your organization?

3. Adopt the template

- Start using it.
- Get feedback from your chair, full board, and staff.



GLOBALTRUST PARTNERS



DASHBOARD

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What if you used it?

Why should your organization invest in strong Quarterly Dashboards?



RANDY KUNG
GTP Board Member



Questions & Answers



MATTHEW GADSDEN
GTP CFO & Strategy
Catalyst



RUTHIE CRISTOBAL
GTP VP of Partnership
& Communications



RANDY KUNG
GTP Board Member

Next Template Training Tuesday...

6 April 2021
12 noon GMT

**BOARD MEETING AGENDA
& EVALUATION**



GARY HOAG



PAULA MENDOZA



BARBARA SHANTZ



Email inquiries and send impact stories to mail@gtp.org.



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