VSys Voices:
KPI's Made Simple:
Linking Goals to Actionable Results

Presenters

Dana Litwin, CVA, is a globally recognized strategic advisor, speaker, and advocate for civic service. Since 2002 she has guided organizations nationwide to produce breakthrough volunteer and community engagement programs. Dana is the creator of the YouTube channel "Priceless Advice for Leaders of Volunteers", served as President of the Association of Leaders in Volunteer Engagement (AL!VE), and is a founder and facilitator of the National Alliance for Volunteer Engagement.

Roseanna Galindo, CAVS, CCBA, blends three decades of teaching experience with 16 years in healthcare leadership. Certified in business analysis, she helps nonprofit and healthcare leaders to confidently harness data for meaningful impact. Through her blog on www.PeriscopeBPA.com, she bridges communication and data, championing the human experience in healthcare and the essential role of volunteer leaders. Roseanna is also the developer of the Volunteer Satisfaction Index (VSI).
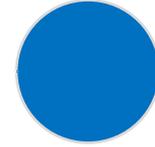
Target audience for today's webinar

SKILL LEVEL
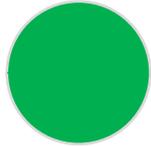
Minimal Knowledge

Looking for some basic information, key principles and "how-to's" on the subject.

Working Knowledge

Integrated practices and moving beyond basic concepts. Looking for breadth and depth on a topic

Authoritative Knowledge

Looking for advanced knowledge, integration and concepts that are innovative and cutting edge.

By the end of todays session, you will:

1. **Know** the difference between metrics, indicators, and objectives

2. **Learn** a straightforward approach to developing Key Performance Indicators (KPIs) that connect strategy to results

3. **Understand** how to track progress efficiently and use data to make informed decisions

Business Objectives

- A guiding light

- A measurable result that tells your stakeholders if you are on the right track to growth

- Align with broader organizational goals

- Short or long term

Anatomy of a Business Objective

- **An active verb** $\textcolor{red}{\textbf{+}}$

  [increase/decrease/achieve/acquire/align/develop/attain]

- **A category label** $\textcolor{red}{\textbf{+}}$

  [volunteer retention/program outreach/sales profit]

- **A statement of impact**

  Quantify the impact that you intent to have

Types of Business Objectives in a Nonprofit

- Mission impact

- Stakeholder engagement

- Operational efficiency

- Financial sustainability

Mission Impact Objectives

- Organizational mission

- Population served

- Community impact

  ✓ *Improve program outcomes by 20% through enhanced service delivery*

  ✓ *Expand the reach of educational initiatives to underserved areas*

  ✓ *Identify and reduce programs that have low strategic power*

Stakeholder Engagement Objectives

- Maintaining relationships

- Engaging key stakeholder groups

  ✓ *Increase community awareness and engagement by 25% through targeted outreach campaigns*

  ✓ *Increase attendance at volunteer recognition events by 10%*

  ✓ *Increase social media engagement of volunteers*

Operational Efficiency Objectives

- Internal operations

- Processes

- Technology

  ✓ *Streamline volunteer onboarding process to increase onboarding retention by 20%*

  ✓ *Implement new technology to reduce manual tasks by 30%*

  ✓ *Develop staff training program to improve service delivery*

Financial Sustainability Objectives

- Financial health

- Sustainability

- Resource management

  ✓ *Improve donor retention by 15%*

  ✓ *Diversify funding sources, aiming for 20% of revenue from new grants*

  ✓ *Reduce gift shop operational costs by 10% through new supplies and vendors*

Key Performance Indicators (KPI)

- Links objectives with performance

- Critical indicator of progress toward achieving an objective

- Tied directly to strategic thinking and planning

- Represents the initiatives most likely to drive success and progress

Rules for Developing KPI

- Base on objective data

- Measure the same KPI over time

- Include different areas of business

- SMART-ER

  - ✓ Specific

  - ✓ Measurable

  - ✓ Attainable

  - ✓ Relevant

  - ✓ Time-Bound

  - ✓ Evaluate & Re-evaluate

5 Steps to a SMART KPI

1. Is the KPI **specific**?

Increase onboarding of in-patient volunteers for the rounding programs from 2 to 5 per monthly live orientation by Q2.

5 Steps to a SMART KPI

2. Is the KPI **measurable**?

Increase onboarding of in-patient volunteers for the rounding programs **from 2 to 5 per monthly live orientation** by Q2.

5 Steps to a SMART KPI

3. Is the KPI **attainable**?

Increase onboarding of in-patient volunteers **for** the rounding programs **from** 2 to 5 per monthly live orientation **by** Q2.

5 Steps to a SMART KPI

4. Is the KPI **relevant**?

   Increase onboarding of in-patient volunteers **for the rounding programs** from 2 to 5 per monthly live orientation by Q2.

5 Steps to a SMART KPI

5.   Is the KPI **time-bound**?

Increase onboarding of in-patient volunteers for the rounding programs from 2 to 5 per monthly live orientation **by Q2.**

Linking KPI to Your Strategic Plan

- Strong KPI drive your Strategic Plan and Data Strategy

- Connect ideas, initiatives, programs, and daily operations to organizational goals

- Data driven decision making reduces uncertainty
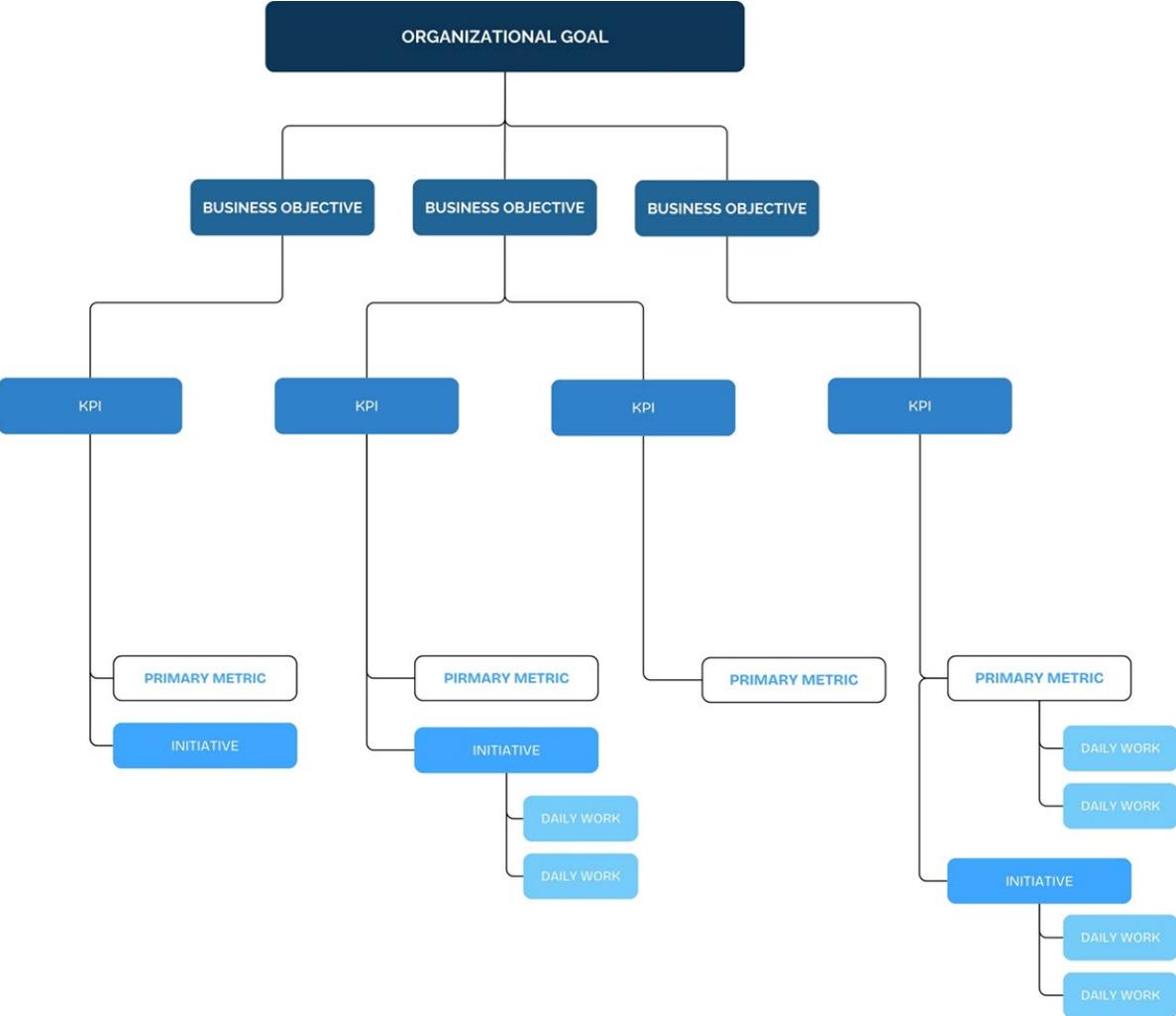
Linking Goals to Actionable Results – Mission Impact Example

Step	Definition	Example Application
Organizational Goal	A broad, far-reaching priority aligned with organization's mission.	Improve Patient Experience
Business Objective	Created from an action verb, category label, and statement of impact.	Expand direct patient-facing volunteer program participation by 35%
Key Performance Indicator (KPI)	A measurable, SMART goal that defines success	**Increase the percentage of Patient Ambassador shifts filled by 50% within the next year.**
Strategic Initiative	The focused strategy to achieve the KPI	Launch a Patient Ambassador recruitment campaign
Key Indicator (Primary Metric)	The quantifiable measure of success	**Percentage of shifts filled (target: 24 of 45 shifts per week)**
Daily Work	The specific tasks, time, and resources required	Developing, promoting, and executing the recruitment campaign

Linking Goals to Actionable Results – Mission Impact Example

Step	Example Application
Organizational Goal	Improve Patient Experience
Business Objective	Increase the percentage of patients and visitors receiving direct wayfinding assistance by 40%
Key Performance Indicator (KPI)	**Achieve a 75% rate of volunteers accompanying patients/visitors to destinations rather than only providing verbal directions, within 6 months**
Strategic Initiative	Wayfinding Volunteer Program Expansion
Key Indicator (Primary Metric)	**% of wayfinding interactions where volunteers walk patients/ visitors to their destinations, patient/visitor satisfaction scores on wayfinding**
Daily Work	Develop volunteer training, adjust station assignments, track interactions through simple logging system, implement patient/visitor feedback collection

Linking Goals to Actionable Results – Financial Stewardship Example

Step	Example Application
Organizational Goal	Enhance Financial Stewardship
Business Objective	Increase net revenue from the volunteer-run gift shop by 20%
Key Performance Indicator (KPI)	**Increase revenue-generating volunteer shifts by 25% within six months**
Strategic Initiative	Gift Shop Volunteer Engagement and Scheduling Optimization Plan
Key Indicator (Primary Metric)	**Total revenue increase, % of volunteer shift coverage**
Daily Work	Recruit for more volunteers, optimize scheduling for high-traffic hours, implement upselling training for volunteers

Linking Goals to Actionable Results – Financial Stewardship Example

Step	Example Application
Organizational Goal	Enhance Financial Stewardship
Business Objective	Reduce costs associated with low-impact volunteer programs by 10%
Key Performance Indicator (KPI)	**Reallocate 20% of volunteer hours from underperforming programs to high-value initiatives within nine months**
Strategic Initiative	Volunteer Program Impact Assessment and Realignment Plan
Key Indicator (Primary Metric)	**% of volunteer hours redirected, total costs savings from program adjustments**
Daily Work	Conduct impact assessments and value analysis, gather stakeholder feedback, adjust program offerings, transition volunteers to higher-value roles

Linking Goals to Actionable Results – Employee Engagement Example

Step	Example Application
Organizational Goal	Improve Employee Engagement
Business Objective	Increase volunteer participation in hospital digital and social media engagement by 20%
Key Performance Indicator (KPI)	**Increase volunteer social medial interactions (likes, shares, comments) by 30% in the next year**
Strategic Initiative	Volunteer Digital Engagement Campaign
Key Indicator (Primary Metric)	**Number of volunteer-driven social media engagements (likes, shares, comments), number of volunteers participating in online engagement efforts**
Daily Work	Create volunteer-centric social media content, develop a digital volunteer ambassador program, implement monthly engagement challenges, track social media analytics

Metrics that Matter

- All KPI are driven by metrics, but not all metrics drive KPI

- Map each KPI to its data source in a spreadsheet or diagram

  The data you need may reside in several different platforms

- Create metrics – aggregate and perform calculations

  For example, your output may have the total number of volunteer shifts and the total number of patient encounters, but the KPI is encounters per shift.

Communicating KPI

- Align stakeholders around your business objectives

- Have recurring personal interaction

- Communicate frequently

- Tailor communication to meet stakeholder needs

- Use visualization techniques

Evaluate and Re-Evaluate

- KPI need periodic assessment

- Teams change, conditions change, and the environment changes

- Review, revise, and repeat

Ideas to Action

1. Keep it simple
2. Tell your story
3. Review, revise, and repeat
4. Measuring something is better than nothing at all

More Resources

- Dana Litwin's Tuesday Tips: [KPIs for Volunteers](#)

- Roseanna Galindo's PeriscopeBPA.com

    Blog: [KPIs that Align Your Nonprofit's Mission and Strategy](#)

    Toolbox: [102 KPI for Healthcare Volunteer Leadership](#)

- VSysVoices webinar recordings

Open Discussion & Questions

Thank you for joining us!