



RAISE TECH

Dashboard Funder Toolkit

How to Talk About Your Dashboard With Your Funders

A guide for nonprofit leaders making the case for dashboard infrastructure.

Start with the Cheat Sheet. It is the next page.

One page tells you most of what you need. Keep going when you want the scripts, the objections, and the worksheet.

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Cheat Sheet

The one page that tells you everything you need to know

Most of what nonprofit leaders know about indirect costs they learned from whoever came before them. That is not a failing, it is how the sector works. This page gives you what most people in your seat were never shown.

What indirect costs actually are

Funds that support more than one program. Accounting software. Your database. IT. Office rent. Leadership salaries. Infrastructure. A dashboard belongs in the same category.

The three places a dashboard can live in your budget

Bucket	What it is and what it means for you
Bucket 1	Grant indirect allowance. The cap on your program grant. What most people know, and the hardest conversation. Usually not the right starting point.
Bucket 2	General operating support. Unrestricted funds you can spend on anything that supports operations. A dashboard can live here. No special conversation required. YOU decide.
Bucket 3	Infrastructure or capacity funders. Some foundations fund technology and organizational effectiveness. Often different people from your program funders. Have you asked?

Figure out your bucket before you walk into any room

- Any general operating support funders? If yes: **Bucket 2**. You decide, no special conversation needed.
- Any funder with a capacity or technology track? If yes: **Bucket 3**. Ask your program officer.
- All restricted program grants with indirect caps? You are in **Bucket 1**. Use the scripts in Part B.

The five questions to answer before your funder meeting

1. Which programs in our organization would this dashboard support?
2. What would this dashboard show us about our work that we cannot see right now?
3. What decision last month would have been better with that information?
4. Why would that visibility matter to my funder?
5. Which of my current funders is most likely to be open to this, and what bucket are they in?

Keep going for the rest. Part A explains where each of these comes from. Part B has the scripts. Part C has the objections and the worksheet.

RAISE Tech · raisetech.org · shellie@raisetech.org



PART A

What You Need to Know Before the Conversation

Most of what nonprofit leaders know about indirect costs they learned from whoever came before them. That is not a failing. That is how the sector works. The person who trained the current director learned from someone who learned from someone else, all the way back to whoever set up the budget structure decades ago. Nobody questions it, because questioning it means admitting you do not know something. In a resource-scarce environment, that feels like a risk. So the mythology solidifies. What started as a rule that applied to specific grant contexts becomes organizational truth. And nobody checks it, because checking it would mean admitting they did not already know. This guide is not correcting you. It is giving you something most people in your seat were never shown.

The Whole Picture on Indirect Costs

Most nonprofit leaders know one piece of this. Here is the rest.

What indirect costs actually are

Indirect costs are funds that support more than one program. Not overhead in the pejorative sense. Not waste. Infrastructure. The things that make every program possible but cannot be traced to a single program.

Think of your organization like a house. The programs are the rooms: the kitchen, the bedrooms, the living spaces that people see and use. Indirect costs are the foundation. Nobody thinks much about the foundation until there is a crack in it. But without it, nothing else stands.

Some examples every leader will recognize:

- Your accounting software
- Your database
- Your IT system
- Your HR function
- Rent on your main office
- Leadership salaries that keep the whole organization running

A dashboard belongs in that same category. It pulls data from across the organization, serves leadership decisions for the whole organization, and helps every program by making the whole system visible.

Source: National Council of Nonprofits

Where a dashboard actually lives in your budget

This is the part most people were never shown. There are three places a dashboard can be funded. Most leaders only know about one of them, and it is the hardest one.

Bucket	What it is	The conversation
Bucket 1	Grant indirect cost allowance	The percentage cap your program funder allows for overhead. This is what most leaders know. It is the hardest conversation and usually not the right starting point.
Bucket 2	General operating support	Unrestricted or general operating funds the organization can spend on anything that supports operations. A dashboard lives here without any special funder conversation. This is where most successful infrastructure purchases happen.
Bucket 3	Infrastructure or capacity funders	Some foundations specifically fund technology, capacity building, and organizational effectiveness. These are often different people from your program funders. If you have never asked whether your funder has a capacity track, that question is worth asking.

Most leaders who have successfully funded infrastructure did it through Bucket 2 or Bucket 3, not by fighting over the indirect cap. Before you talk to any funder, figure out which bucket they are in. That changes everything about what you say.

How to figure out which bucket your funder is in

Answer these before any conversation. Your answers tell you which conversation you are actually having.

Question 1: Bucket 2 check

Does this funder give us unrestricted or general operating support? If yes, you are in Bucket 2. The organization decides how to spend those funds. No special funder conversation is required. A dashboard is a legitimate use of general operating support. Move straight to the worksheet.

Question 2: Bucket 3 check

Does this funder have a capacity building, technology, or organizational effectiveness track, separate from their program grants? If you do not know, ask your program officer. The question is not a risk. It is a reasonable inquiry that shows you are thinking about organizational health. If they say yes, you are in Bucket 3.

Question 3: Bucket 1 reality check

Is this funder giving us only restricted program grants with a fixed indirect cap? If yes, you are in Bucket 1. This is the harder conversation, and the scripts in Part B are worth reading first. But ask yourself whether there is a Bucket 2 or Bucket 3 funder you have not yet approached. That conversation is almost always easier.

Why a dashboard belongs in infrastructure

A dashboard is not a deliverable for one program. It is infrastructure that supports every program, every grant report, every board conversation, every funder relationship. It does not produce a single outcome. It makes every outcome more legible, more defensible, and more connected to the whole.

Funders who commission ecosystem dashboards on behalf of grantee portfolios can often fund this as a program-related expense. The investment serves the whole portfolio, not a single grantee.

MacArthur Foundation has increased indirect cost rates and expanded general operating support specifically because of research showing that infrastructure investment is what allows programs to actually deliver. The conversation in philanthropy is shifting, slowly, but it is shifting.

On the risk of asking

Asking your funder for something outside the normal pattern feels like a risk. Especially right now, when the funding environment is genuinely difficult. That is a reasonable thing to feel.

Here is what makes the conversation lower risk than it seems.

- If you are in Bucket 2, there is no ask. You decide.
- If you are in Bucket 3, you are finding the right funder for the right ask, not pushing the wrong funder.
- If you are in Bucket 1, the scripts in Part B give you the language to make the case without triggering the indirect cap fight.

The first question to answer is not how to have the conversation. It is which bucket your funder is in.

The story your programs cannot tell on their own

Without a dashboard, you can tell a funder how each program performed. You cannot tell them:

- Whether your organization, as a whole, is moving people toward better outcomes
- Which combinations of programs actually work together
- Where one program is carrying weight the others could share
- Where people fall through the gaps because nobody is looking at the whole picture at once

A dashboard gives you that system view. It gives you the story your programs cannot tell on their own.



PART B

Funder Scripts

Three conversations. Take the one that fits. Each script below is written to use in a funder meeting. Read it. Adapt it to your voice. Each script also notes which bucket conversation it fits best.

If you run a multi-program nonprofit

Use this when talking to a program officer who funds one or more of your programs. Works for Bucket 1 or Bucket 2 conversations.

SCRIPT FOR INTERNAL ORGANIZATIONAL DASHBOARD

Our program reports tell you how each program performed. This dashboard tells you something we have not been able to show you before: how our programs work together as a system. It lets us see where one program is supporting another, where someone needs three of our services to move forward, and where we have gaps that no single program can close. It is infrastructure that supports every program, which is why it lives in our operating budget, and it gives us a story about our whole organization that no single program report can tell.

If you are a funder or advisor making sector investment decisions

Use this when talking to a foundation program officer, a philanthropic advisor, or a coalition funder. Works for Bucket 2 or Bucket 3 conversations.

SCRIPT FOR ECOSYSTEM INTELLIGENCE DASHBOARD

We are making consequential decisions about this sector with information that is incomplete and scattered. This dashboard gives us a sector view we have not had before: which organizations are stable, which are under stress, where service coverage is thin, and where our funding is concentrated relative to need. It is infrastructure for our decision-making, not a one-time research project, which is why it lives in operating, and it tells a story about the whole field that no single grantee report can tell.

If you are a city planner, county leader, or coalition coordinator

Use this when talking to a government funder, a city department, or a regional planning body. Works for Bucket 2 or Bucket 3 conversations.

SCRIPT FOR GEOGRAPHIC GAP MAPPING DASHBOARD

We have been making geographic investment decisions based on anecdote and gut. This dashboard shows us where services are, where they are not, and where the families who need them are living right now. It is infrastructure for regional planning, not a one-time study, which is why it belongs in operating, and it tells a story about access that no single provider report can tell. Once we can see the gaps, we can make decisions about where to invest next.



PART C

Common Objections and the Worksheet

These are the five objections nonprofit leaders hear most often. Read them before your meeting. The responses are yours to adapt. Note that the first objection includes the bucket reframe, because the cap conversation is often the wrong conversation to be having.

What your funder might say	What you say back
"We cap indirect at 10%."	The dashboard supports every program in the budget you already fund. Counting it inside the 10% cap means the cap is doing its job. But the conversation worth having is whether this belongs in your general operating budget rather than inside a program grant at all. That is a different question from the cap.
"Can you tie this to a specific program?"	We can show you how it strengthens each program, but the value is precisely that it works across all of them. Tying it to one program would lose the system view that makes it worth funding.
"Is there an outcome you can promise?"	Better decisions, made faster, with fewer gaps. We can show you specifically which decisions become possible with this dashboard that are not possible without it. The outcomes flow through every program it supports.
"Do other funders pay for this kind of thing?"	Yes, and the trend is growing. MacArthur Foundation has increased indirect cost rates and expanded general operating support specifically because of what the research shows about infrastructure. The conversation in the field is shifting.
"Why not just use spreadsheets?"	We have. They cannot show us how programs connect, they go out of date the moment we close them, and they cost staff time we do not have. The dashboard pays for itself in hours recovered and decisions made on time.

Five Questions to Answer Before Your Funder Meeting

Fill this out before you walk into the conversation. Your answers are the foundation of your case. By the time you reach question five, you should have everything you need to walk in with confidence.

1. Which programs in our organization would this dashboard support? List them.

2. What would this dashboard show us about our work that we cannot see right now?

3. What decision did I have to make last month that would have been better with that information?

4. Why would that visibility matter to my funder? What does my funder care about that this connects to?

5. Which of my current funders is most likely to be open to this conversation, and what bucket are they in?

Ready to talk about your dashboard? Schedule a scoping conversation at raisetech.org/dashboards, or reach out directly: shellie@raisetech.org