

Guide to Designing a KPI Dashboard

A well-designed KPI dashboard enables a governing body to monitor performance efficiently and maintain clear strategic oversight. The following guidance offers a structured approach suitable for a UK or international independent school but is not exhaustive in its scope.

1. Clarify the Purpose

Begin by identifying what the Board needs to know to discharge its fiduciary, strategic and compliance responsibilities. The dashboard should distil complex information into a concise, high-level view, enabling governors to assess progress and risk quickly, scrutinise performance and identify areas for further questioning.

2. Select a Balanced Set of KPIs

Choose indicators aligned to the school's strategic plan. Aim for breadth without overload. Around 12 to 18 core indicators is typical. Common areas might include:




- **Pupil numbers and admissions:** enquiries, conversion rates, withdrawals.
- **Finance:** cash flow, cost control measured against relevant benchmarks, operating surplus, debt levels, fee arrears.
- **Educational outcomes:** attainment trends, value-added measures, destination data.
- **Pastoral and safeguarding:** attendance, exclusions, safeguarding referrals, trends.
- **Staffing:** turnover trends, recruitment timelines, appraisal completion, performance against staffing budget.
- **Compliance:** policy review cycle, training completion, audit outcomes.
- **Health & Safety:** checks, tracking and monitoring, reviews, accident reporting, trends, external consultants.

3. Define Each KPI Clearly

Set out the measure, data source, reporting frequency, owner and thresholds (e.g., red/amber/green - RAG). This ensures consistency and prevents misinterpretation.

4. Present Information Visually

- Use simple charts, traffic-light ratings (RAG) and short narrative notes.

- Consider the use of trend arrows to show whether a KPI has retained its RAG position,  has improved  or has gone down. 
- Governors should be able to grasp key messages at a glance.

5. Update Regularly and Review Annually

Refresh the dashboard each meeting or term, and review its relevance annually to ensure it continues to serve strategic needs.