

Descriptive Analytics in Story Telling in Tableau

MSBA 203 Final
Project

Current Situation



Junior Achievement is a large international educational non-profit organization that is focused on student success and giving young people the knowledge and skills, they need to plan for the future and make smart academic, economic and career choices.



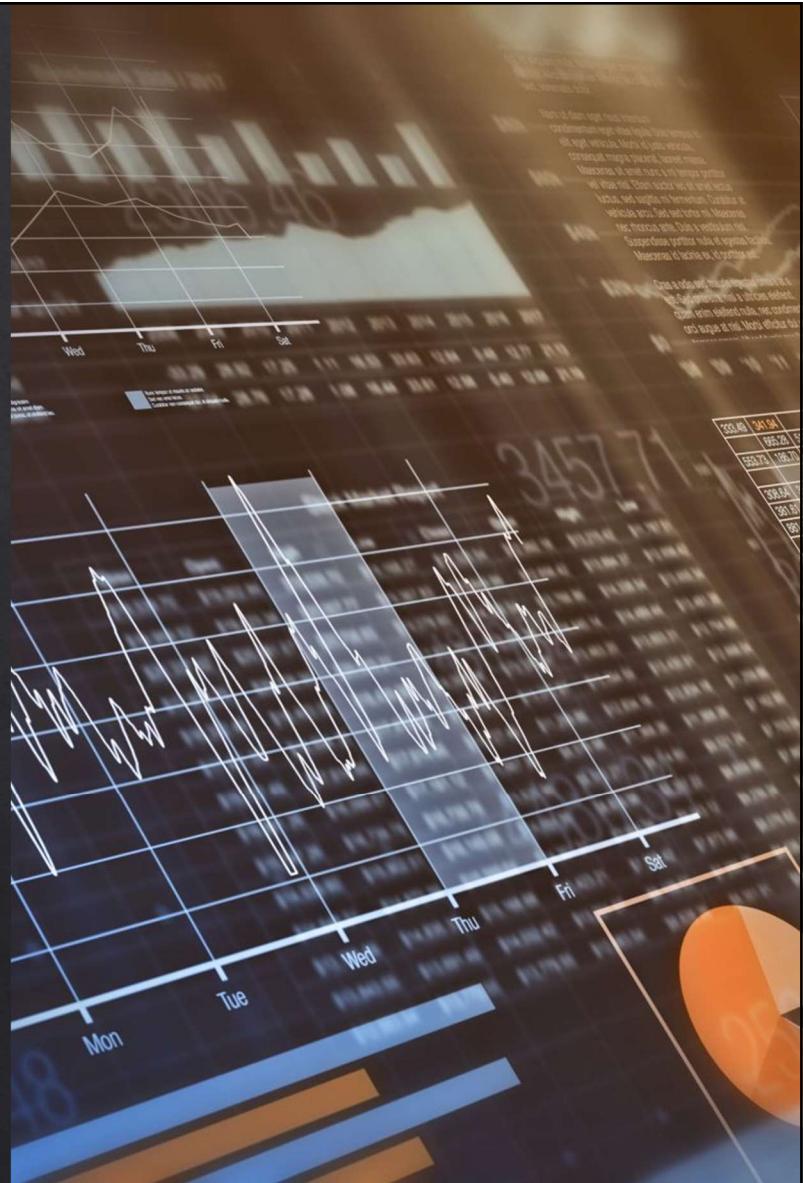
The 2008 Global Financial Crisis put extra strain on non-profits nationwide. This is because donors (typically companies and consumers) were on tighter budgets and had less funds available.



The organization still has to report on key non-profit activities.

Business Requirements and Solutions Overview

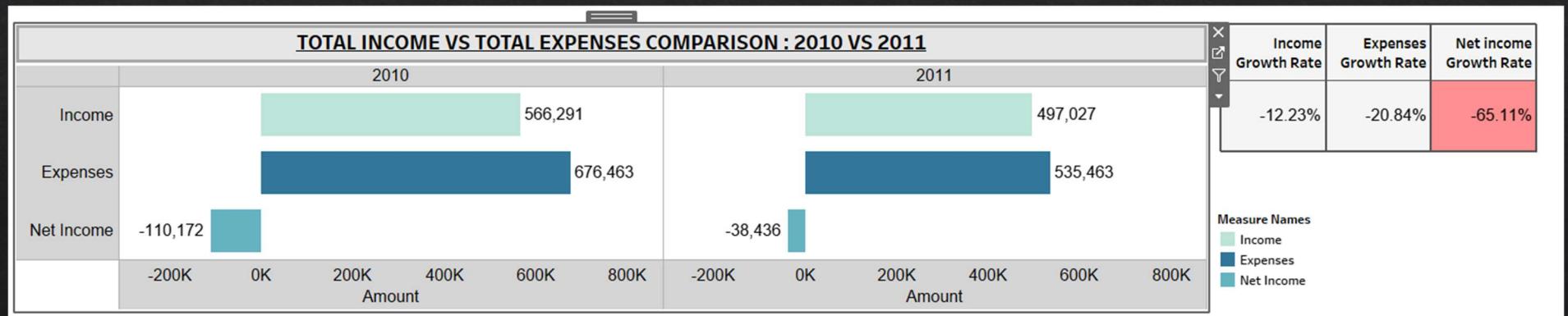
- ❖ The purpose of this project is to provide the President of JA Philadelphia with a proof-of-concept dashboard solution that will allow real time access to summarized and detailed non-profit financial information. This information will provide greater insight into the financial health of JA and allow for more effective decision making to help JA deliver on its mission.
- ❖ 7 KPIs have been identified for use in the dashboard.



Key Insights and Recommendations

KPI 1 – Income vs Expenses

- Allows stakeholders to analyze trends and determine performance.
- Observation: In this comparison, JA 2011's Income and Expense has decreased significantly resulting in increase in negative growth rate.
- Recommendation: To reduce expenses and increase revenue, continue to conduct a thorough review of operations to generate more revenue to achieve improved performance.



Key Insights and Recommendations

KPI 2 – Performance to Budget



This allows us to evaluate business performance against our plan, further analyze the cause of financial deviations, and support informed decisions by the management

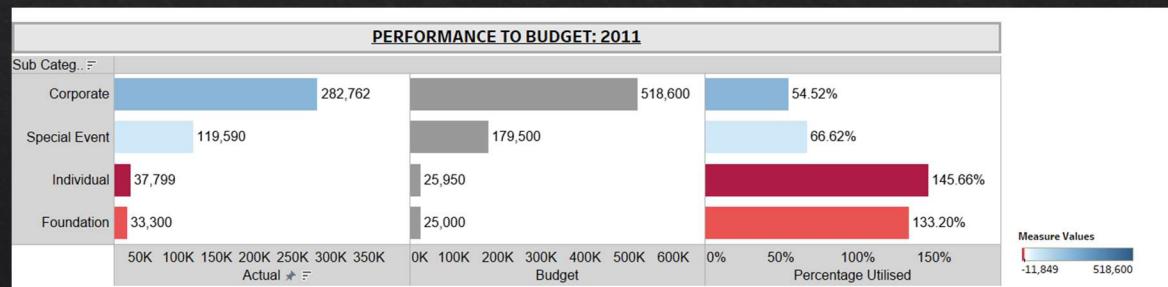


Observation: The foundation and individual actual utilization is more than the allocated budget. This could be due to poor management of budgets.



Recommendation: By timely tracking actual performance against budget can help JA take proactive measures and keep expenses in control.

It is crucial that JA re-evaluates and their budgets.



Key Insights and Recommendations

KPI 3 – No. Of Contributors and average donation per year

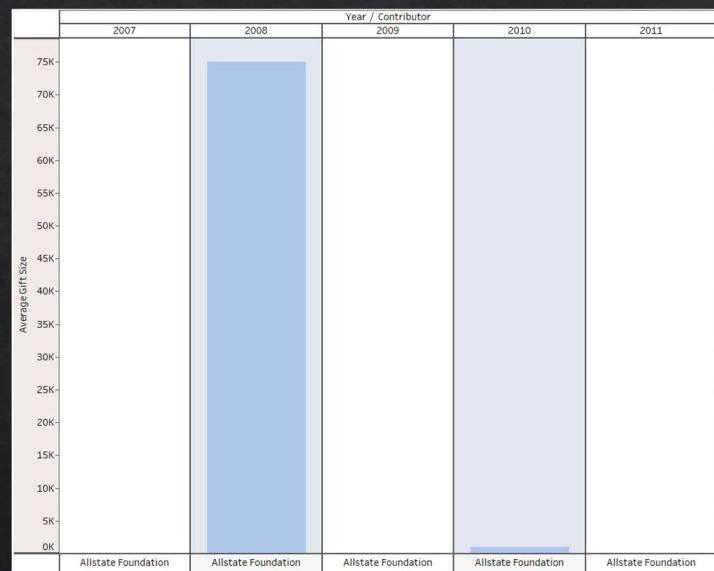
- ◆ Observation: Number of Donors are rebounding after dropping to a low in the middle year. Average donations, though, are continuing to fall.
- ◆ Recommendation: Increase fundraising, focusing on higher donations from each donor.

<u>Average Donation</u>		
Ye..	Number o...	Average ..
2007	286	2,826
2008	247	2,591
2009	195	2,963
2010	220	2,490
2011	256	2,196

Key Insights and Recommendations

KPI 4 – Average size gift

- ❖ Observation: Among the top 20 donors, the average gift sizes are around \$15,000, with a few donors standing out Herr Foods Inc in 2007 and Allstate Foundation in 2008.
- ❖ Recommendation: Similar to previously, focus fundraising on higher donations from each donor.



Key Insights and Recommendations

KPI 5 – Number, % Repeat contributors, Number of new contributors

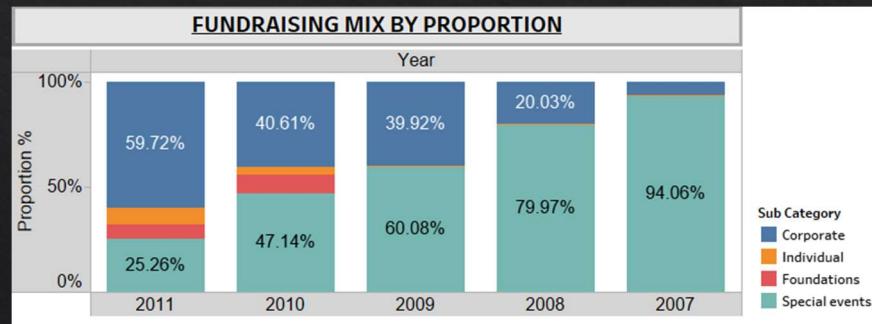
- ❖ Observation: A majority (55%) of contributors for 2011 were contributing for the first time.
- ❖ Recommendation: Similar to previously, JA can focus fundraising on previous contributors, but they should not ignore continuing to find new contributors.

Repeat Contributor	% of Contributor	Number of Contributors
New	54.88%	90.00
Repeat	45.12%	74.00

Key Insights and Recommendations

KPI 6 – Fundraising Mix

- ❖ This allows us to identify the proportion of fundraised by each category. and further help manage budgets for next year
- ❖ Observation: Corporate fundraising has increased, while special event fundraising is decreasing. Meanwhile, fundraising through foundations and individuals is improving and hence budgeting for foundational and individual needs to be improved as well.
- ❖ Recommendation: Budget towards special event and corporate can be adjusted a bit to accommodate Foundation and Individual which is showing good potential recently.



Key Insights and Recommendations KPI 7– Operating Reserve Ratio

- ❖ Very important metric used to manage risks and maintain financial stability
- ❖ Observation: An operating reserve ratio of -9.03% implies that JA's unrestricted net assets are not sufficient to cover its annual operating expenses. In simple words its liabilities are more than assets.
- ❖ Recommendation: JA should take immediate action to address all underlying issues for negative operating reserves through cost cutting, better manage budgets, increasing revenue generation efforts, or seeking additional funding sources.

OPERATING RESERVE RATIO	
Unrestricted net assets	-46,706
Annual Operating Expense	535,463
Operating Reserve Ratio (%)	-8.72%

Summary of Assumptions

- ◊ For contributions, one assumption was that only positive values were used, negative and zero amounts were excluded.