FUNDRAISER PORTFOLIO SCORECARD REPORT

PROBLEM STATEMENT

Fundraisers currently lack a centralized, visual tool to monitor portfolios, leading to several challenges:

- **Difficult to track engagement with prospects**, making it hard to understand where each prospect stands in the prospect lifecycle
- **Hard to prioritize outreach efforts**, leading to inefficient use of time and resources on lower-priority prospects
- **Challenges in meeting performance goals** due to a lack of clear visibility into portfolio progress and prospect potential
- Information is spread across multiple **systems** or **reports**, causing delays and confusion in accessing critical data
- **Limited ability to analyze trends** and **identify high-potential donors**, impacting fundraising strategies

These limitations prevent fundraisers from maximizing their impact, slowing down decision-making, and ultimately affecting fundraising outcomes.

BENEFITS

This project delivers a **centralized**, **easy to use dashboard** that **empowers fundraisers** with actionable insights. By eliminating manual portfolio checks and surfacing priority prospects, it **saves time** and **streamlines decision-making**. The tool consolidates siloed reports into **one visual hub** and provides **guided next steps**.

- Combines engagement, gift capacity, and strategy in **one view**
- Helps Advancement **grow future giving** with greater focus

OUR SOLUTION

- **Centralizes key portfolio insights** in one place
- Provides **clear, actionable data** for **decision-making**
- Supports strategic **prospect management**
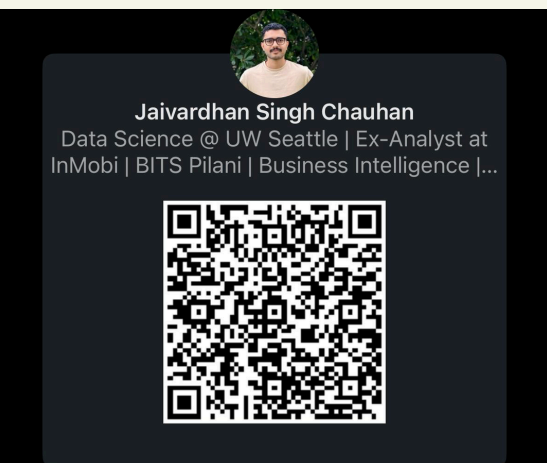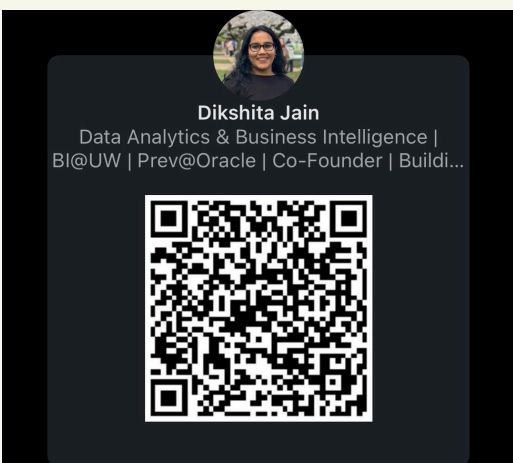- **Empowers fundraisers** and leadership with real-time visibility

The dashboard offers a unified view that enables fundraisers to track, prioritize, and engage with prospects efficiently. This tool boosts **fundraising efforts, optimizes outreach**, and builds **sustained donor engagement** by leveraging actionable insights.

Save **500+** staff hours per week for **197** fundraisers.

Highlights priority prospects (**7,072** tracked in FY 23/24).

Supports oversight of **$668.7M** raised in FY 23/24.

ABOUT US

THE METRIC MASTERS

Dikshita Jain
Data Analytics & Business Intelligence | BI@UW | Prev@Oracle | Co-Founder | Buildi...

Gracy Ahuja
Data Scientist @ Costco IT | MSIM @ UW | Director of DEI @ UW AIMS | GHC '24 Atte...

Jaivardhan Singh Chauhan
Data Science @ UW Seattle | Ex-Analyst at InMobi | BITS Pilani | Business Intelligence |...

PROCESS FLOWCHART

Understanding the fundraising process
Three main phases: Qualification, Cultivation & Negotiation based on prospect data

Understanding problem statement
Prospect data spread across multiple systems; made it difficult for fundraisers to plan next steps

Design Wireframe
With the help of stakeholders, initial wireframe was designed - it contained elements such as Prospect segmentation by stage and centralized prospect repository

Fundraiser interviews and wireframe iteration
Conducted 8 user interviews understanding their needs by asking these questions:
"What do you do to move prospects closer to a donation?"
"What are your biggest pain points?"
"What tools or reports do you currently rely on?"

Explore existing data warehouse
We explored the University Advancement data warehouse to identify core tables like Prospects, Fundraisers, Proposals, Contact Reports

Create views to extract data
Using SQL to select relevant fields for each dashboard component to create a view that would extract data every 24 hours

Build Tableau Dashboard
Create tableau dashboard using the extracted data

OUR SPONSOR

University Advancement at the **University of Washington** is dedicated to building meaningful relationships with **alumni**, **donors**, and **supporters**. Their goal is to secure **financial support** for the university's mission through strategic fundraising efforts. By fostering **long term connections** with key **stakeholders**, they help ensure UW's continued success in **research**, **education**, and **community engagement**.

OFFICE OF DEVELOPMENT
UNIVERSITY of WASHINGTON
University Advancement

CHALLENGES

Building this solution involved navigating **structural** and **adoption challenges**. **Data was scattered** across many tables, and the **evolving project scope** kept progress in check. **Fundraiser adoption** across various unique workflows also demands **ongoing training** and a thoughtful **change management approach**.

- Data delays and **shifting requirements** increased **development time**
- Multiple tables and **changing dimensions** added **technical complexity**

NEXT STEPS

- Convert the prototype into a **production-ready version** through iterative testing.
- Add **GUIDs that link** directly to **Tandem**, **contact reports**, and **prospect dashboards**.
- Implement a **structured training** and **change-management plan**.

STAKEHOLDERS

Fundraisers: Staff who manage donor relationships and drive fundraising efforts (End User)
**Prospects:** Potential donors identified for future contributions.

IMPACT

The scorecard can potentially support the stewardship of UW's **$669M** annual pipeline. It lays the groundwork for scalable AI recommendations and gives leadership real-time metrics to track fundraiser progress and portfolio health.

- Saves **500+ staff hours per week** through automation
- Encourages strategic outreach and smarter time use
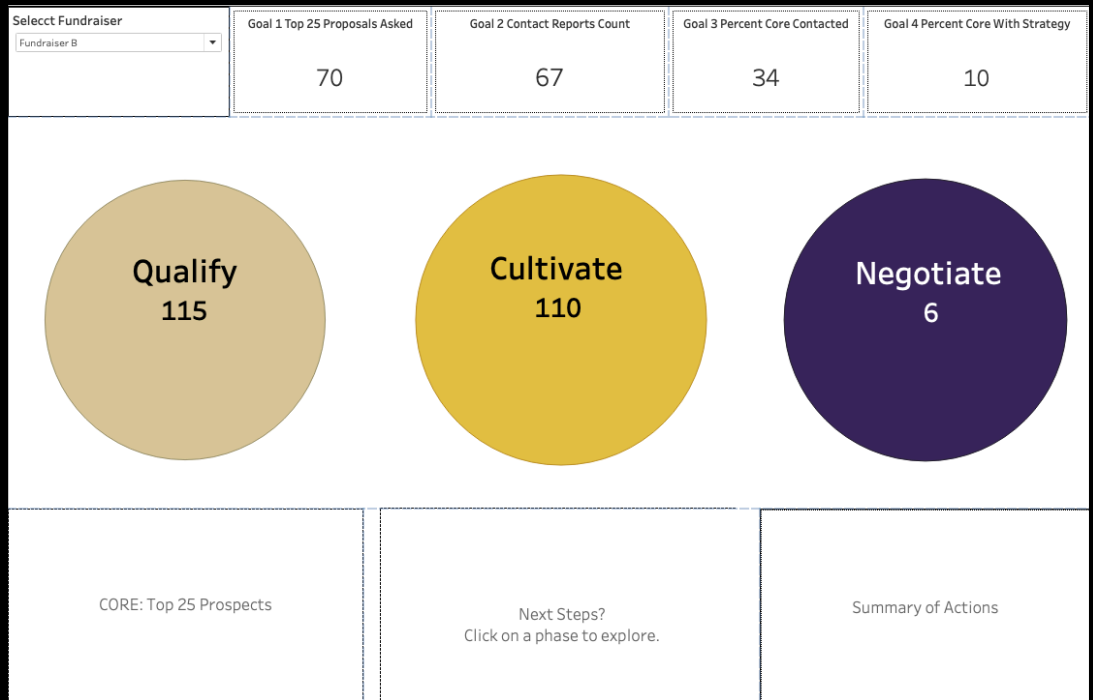- Establishes a foundation for AI-driven insights

EVOLUTION OF OUR DASHBOARD DESIGN
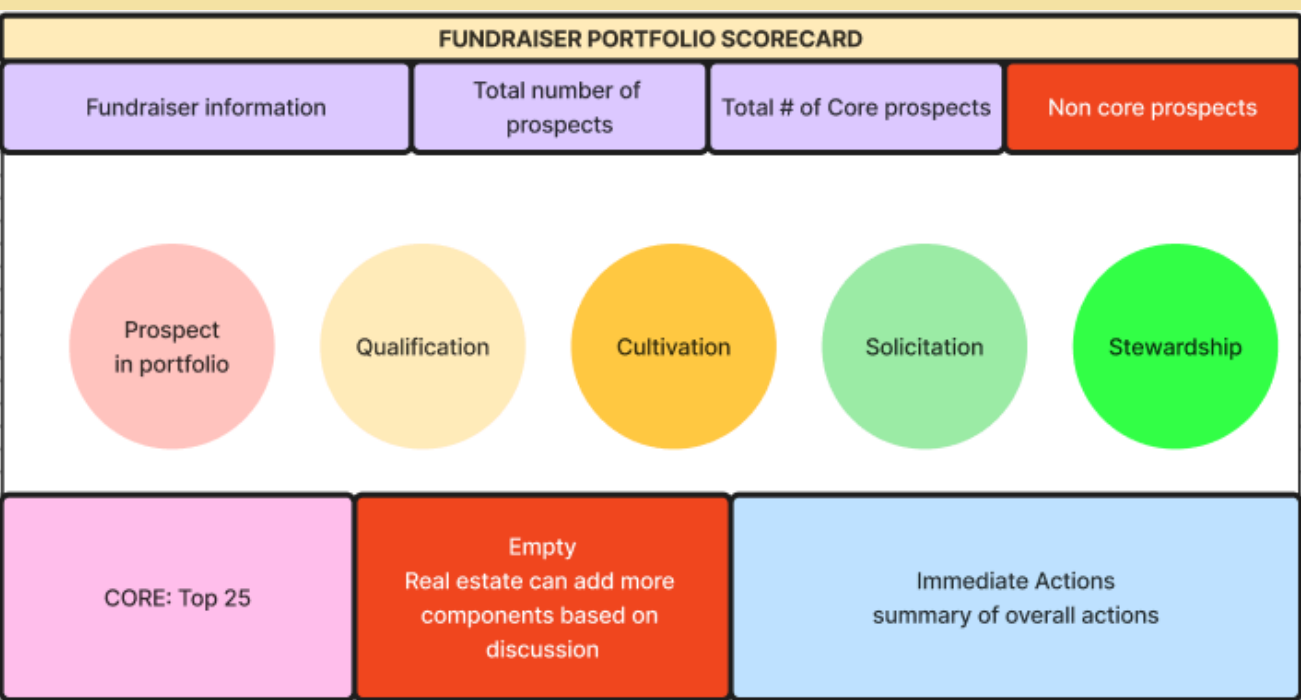
Initial Iteration of Wireframe after talking to Stakeholders
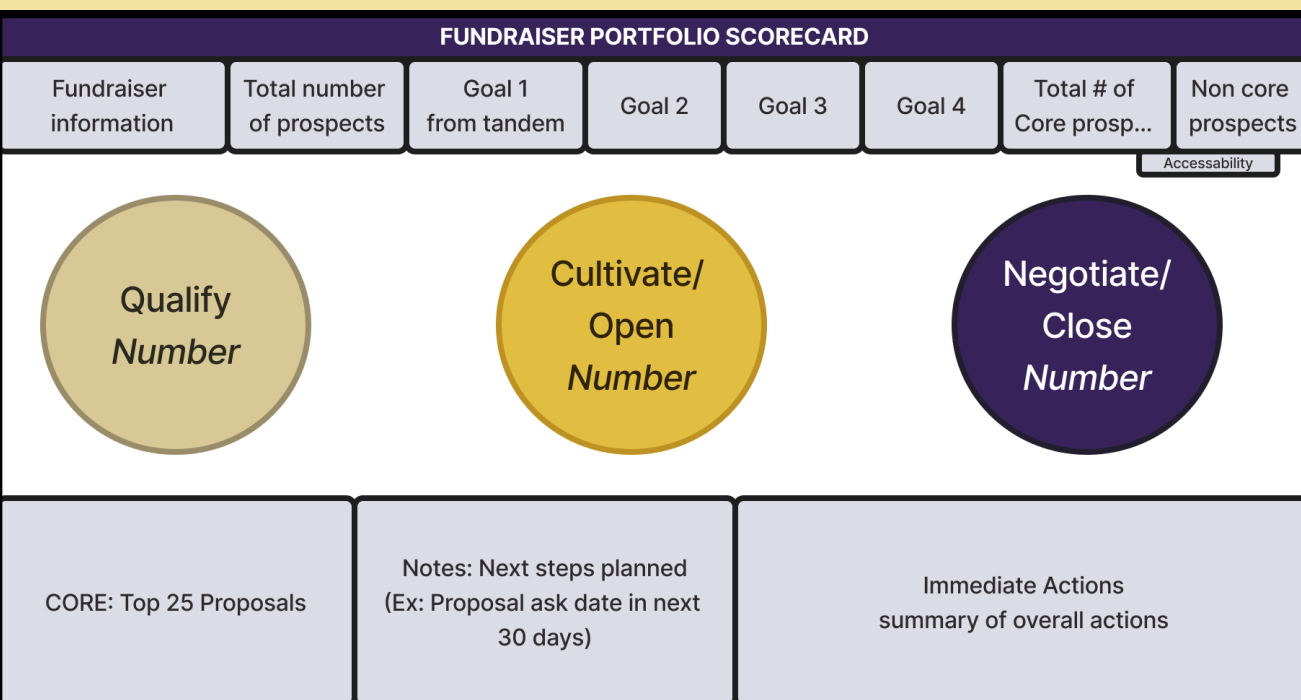
Final iteration after feedback from various stakeholders and incorporating data from user interviews

Dashboard delivered to our sponsor