



UNIVERSITY
ADVANCEMENT

FUNDRAISER DASHBOARD



METRIC
MASTERS

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INFORMATION SCHOOL
MSIM
UNIVERSITY *of* WASHINGTON



About Us

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Our Sponsor: University Advancement at UW

Who They Are:

University Advancement is a strategic fundraising and engagement team of the University of Washington.



\$668.7 M
Fundraising
in FY 23/24



🎯 Their goal is to empower fundraisers with actionable insights—our project helps make that happen.

The Problem

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

- Difficult to **track engagement** with prospects
- Hard to **prioritize outreach efforts**
- Challenges in **meeting performance goals**
- Information spread across multiple systems or reports

The Opportunity

We are building an interactive Tableau dashboard to:

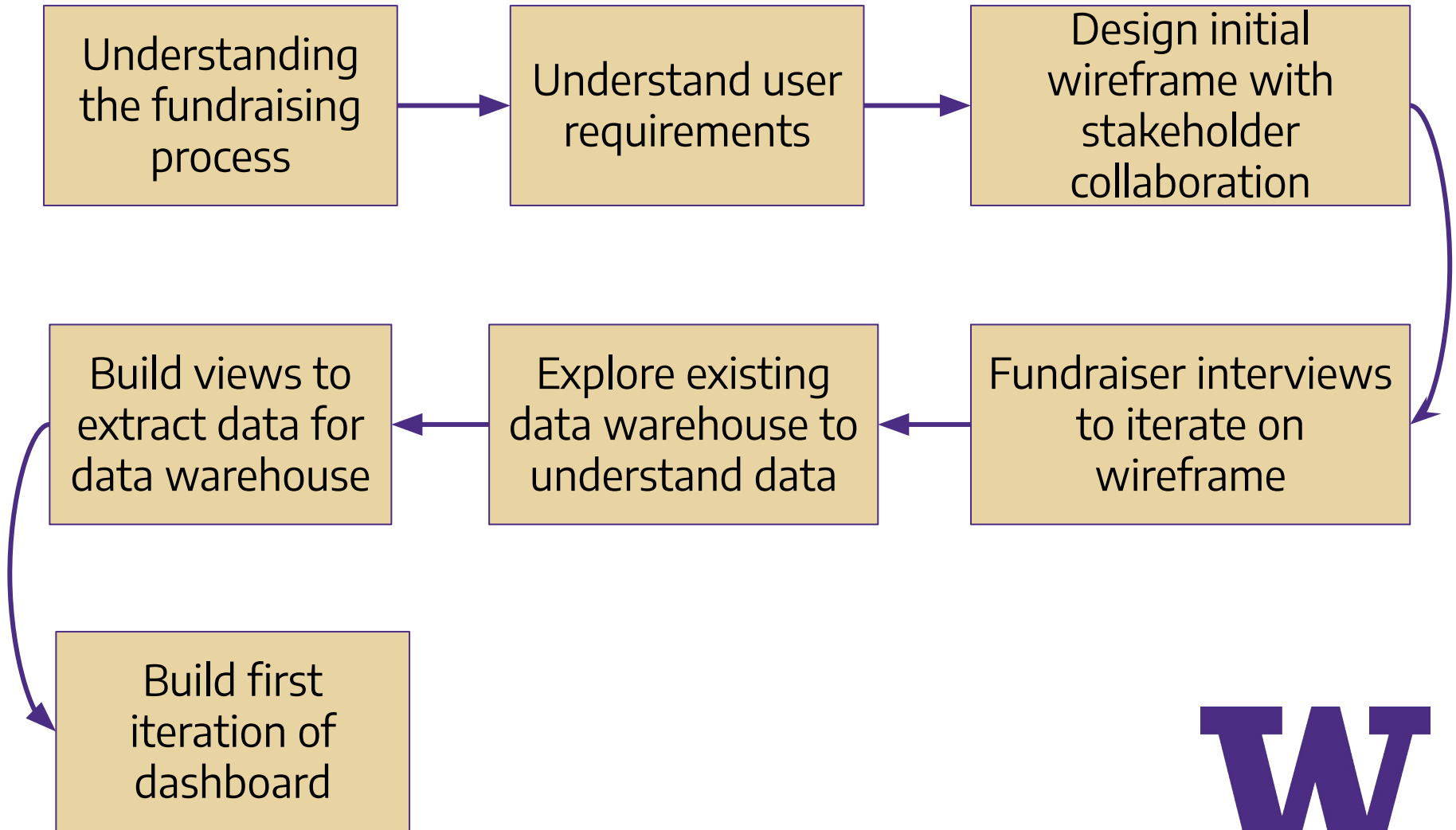
- **Centralize key portfolio** insights in one place
- Provide **clear, actionable data for decision-making**
- Support **strategic pipeline management**
- Empower fundraisers and leadership with real-time visibility

The Stakeholders



Fundraisers: Staff who manage donor relationships and drive fundraising efforts.
Prospects: Potential donors identified for future contributions.

OUR PROCESS



Understanding the Fundraising Process?

QUALIFICATION

Prospect is added by Fundraiser in their Portfolio.

Their capacity and affinity of donation is considered by the fundraiser to possibly make an ask for donation.

CULTIVATE

A relationship with the prospect is cultivated through mails, in-person or virtual meetings, and other forms.

A proposal is developed to share with the prospect.

NEGOTIATE/ CLOSE

Negotiation between prospect and fundraiser could happen based on their capacity.

Donation is made or not and proposal is closed.



Understand User Requirements



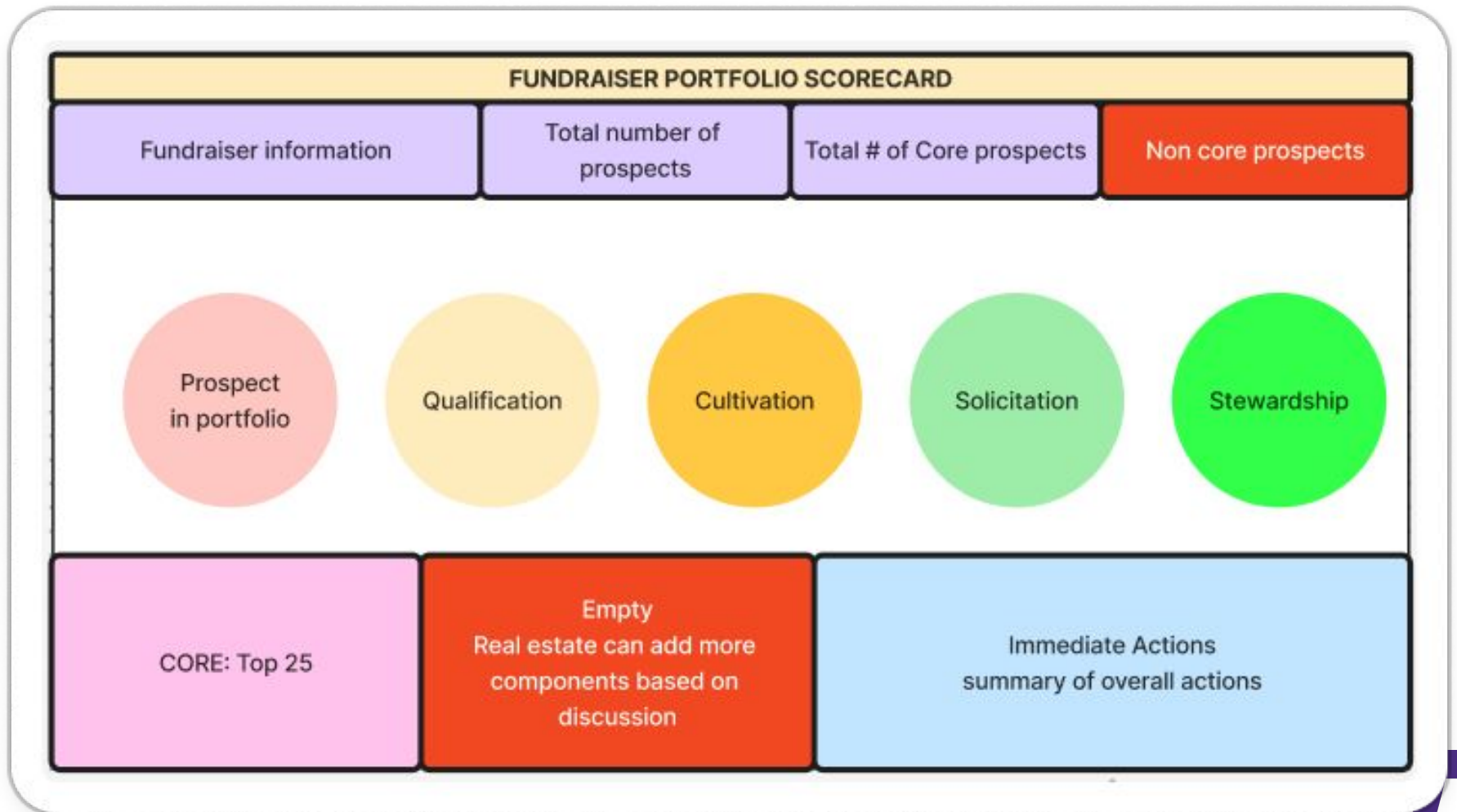
Prevent overloading of portfolios/ reduce portfolio bloating



Recommend next steps to move prospect closer to donation



Design Initial Wireframe



Design Initial Wireframe

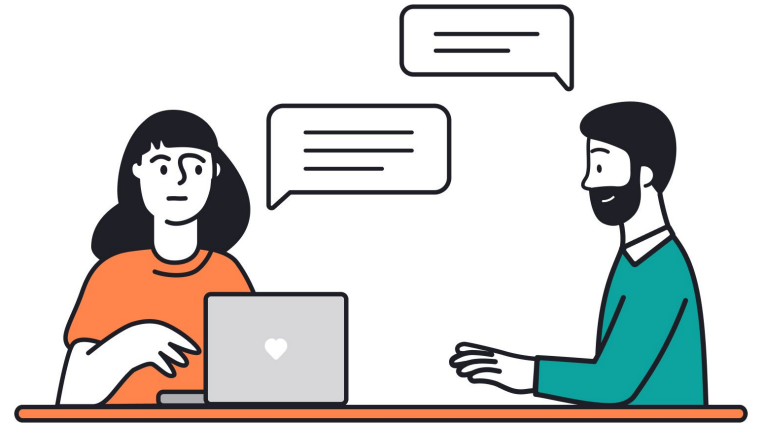
Fundraiser Portfolio Scorecard											
Fundraiser information				Qualify							
Historical Proposal ID	Prospect ID	Prospect Info	capacity	Affinity (highest affinity)	Funding Area	Contact Report	Proposal title (link)	Historical Proposal end date	Result amount	Suggestion/ Next steps	Notes type thing
102	6 (this will have a link to all the data related to the prospect)	Microsoft	\$1M	\$250k	Mary Gates Foundation	1st Feb 2025 (link to contact report)	N	NA			
205	8										
309											



Fundraiser Interviews

Questions understanding the process that fundraiser go through to move prospect along like below were asked to help improve the wireframe.

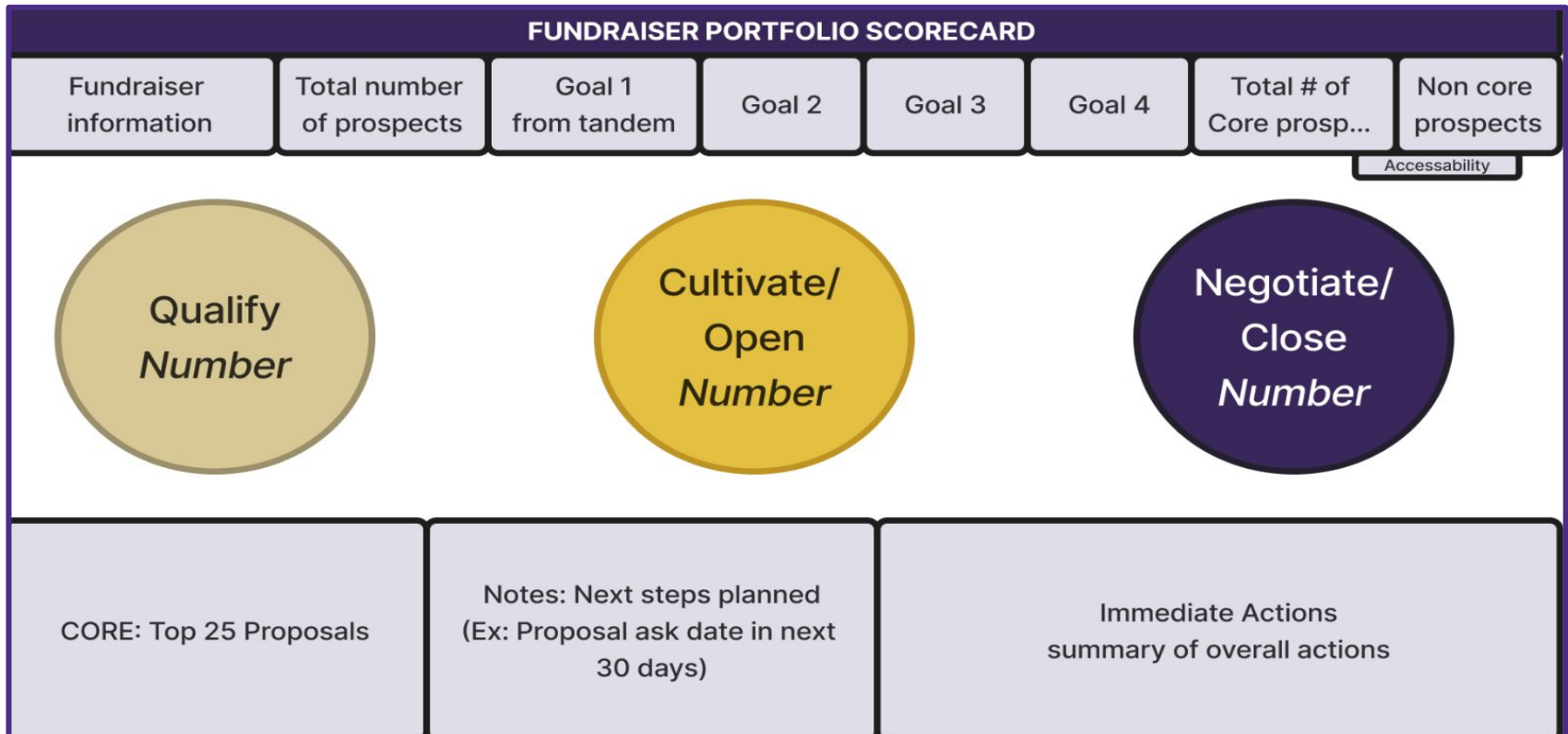
- What data points could be helpful?
- What are your pain points?
- What current reports and tools do you use?
- What do you do to move prospect closer to donation?



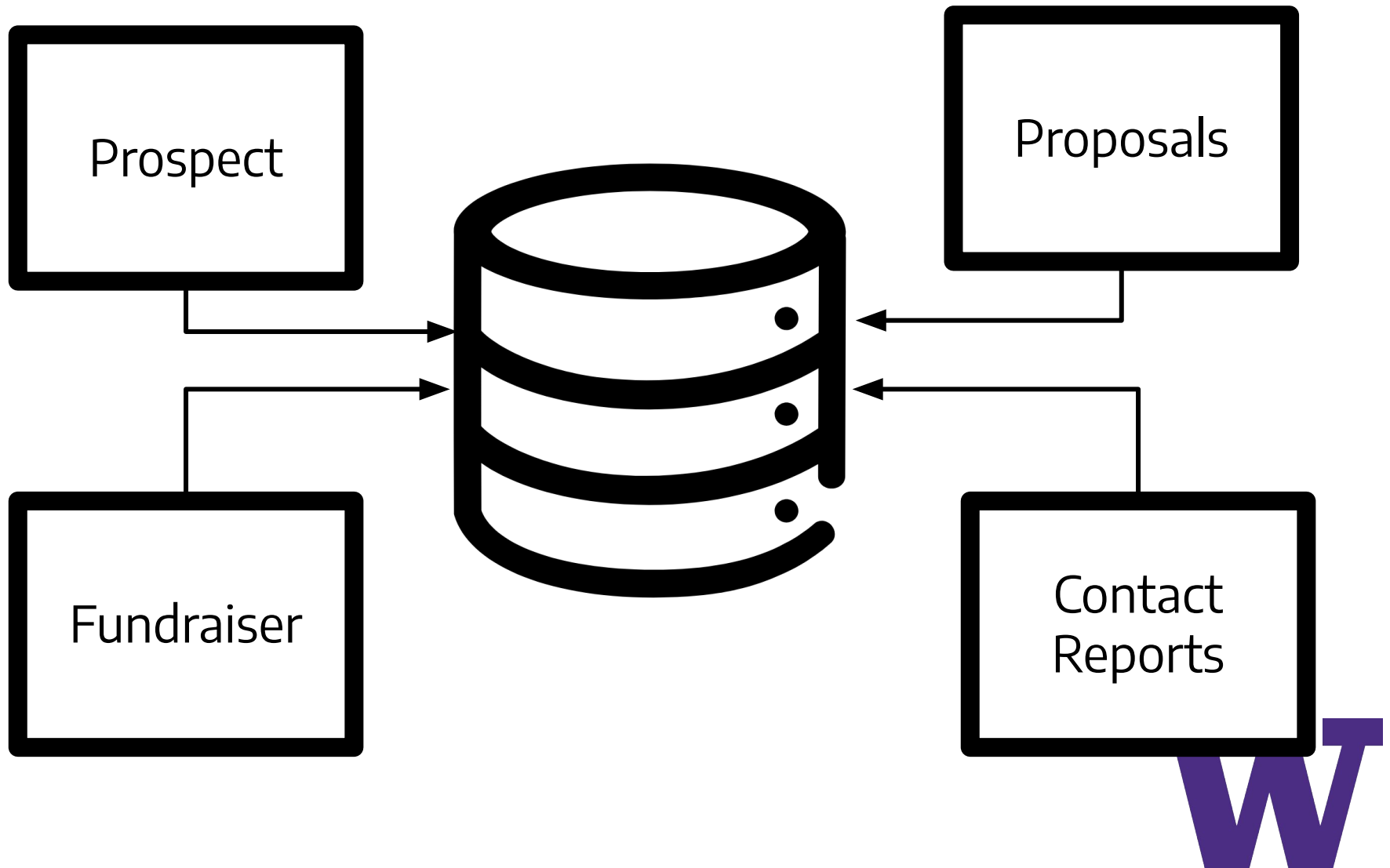
After Interviews: Iterate on Wireframe

Gained clarity on:

- Three main phases instead of five
- Fundraiser pain points
- Data points for each phases used by fundraisers



Explore existing Data Warehouse



Build Views for Each Phase

ENTITY

Prospect

Fundraiser

Proposals

Contact
Reports

VIEWS

```
SELECT  
  Prospect_ID,  
  Fundriaser_ID,  
  Proposal_ID,  
  Contact_Report  
FROM Proposals  
JOIN Fundraisers  
JOIN Prospect  
JOIN Contact Report;
```

DATA EXTRACT

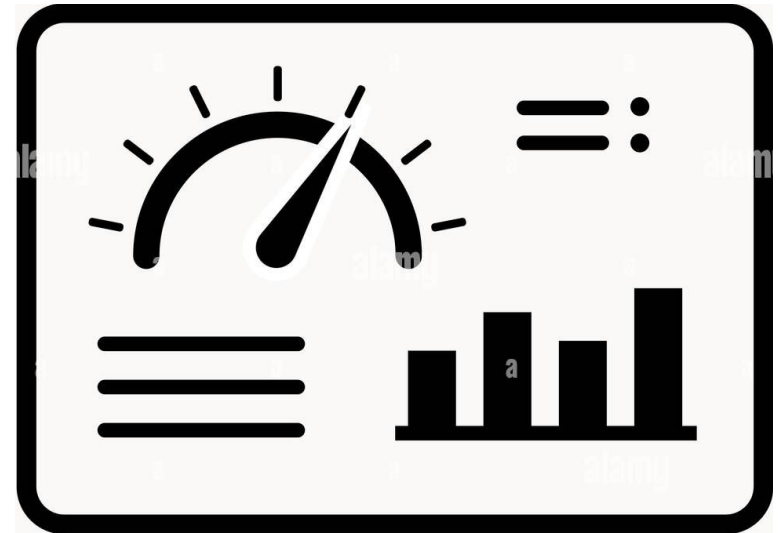


Build Dashboard using dummy data



Data Extract/
Dummy Data

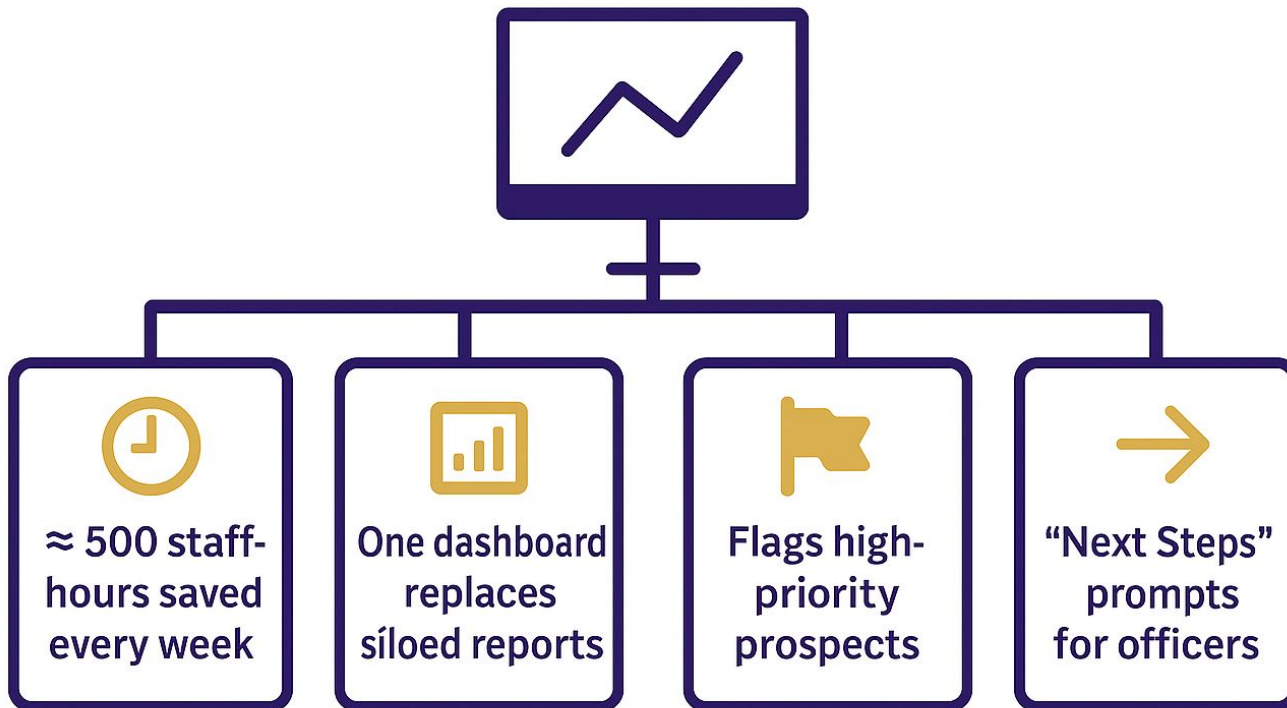
Data Visualization



Dashboard



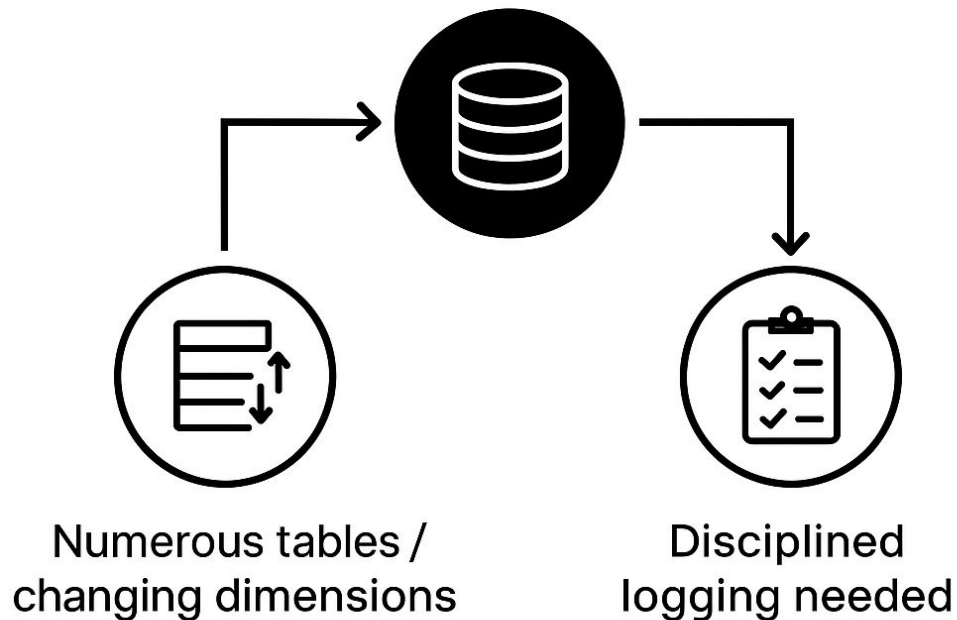
Benefits



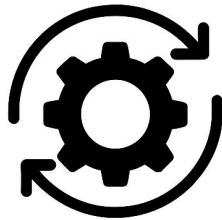
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Challenges

Data Challenges



Challenges



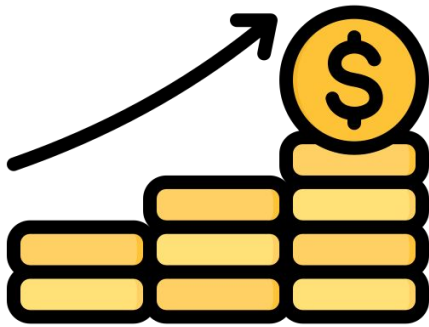
**Access delays &
evolving scope**



**Adoption across
197 workflows**

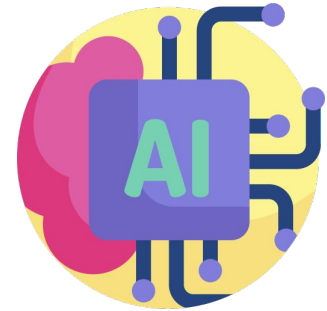


Impact



Efficient stewardship of
\$669M annual pipeline

Foundation for
future AI insights

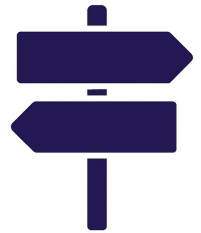


Leadership gets
real-time health
metrics

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Next Steps

- Convert prototype to production version through testing iterations
- Add GUIDs which link to tandem, contact reports, and prospect dashboards
- Increase data driven decision making through the next steps attribute by adding more rules and recommendations
- Pilot and Iterate the product
- Training & change-management plan implementation



Thank You!



ADVANCEMENT LEADERSHIP TEAM

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