



# Presenting and Promoting Success

Creating Actionable Advancement Dashboards for  
Strategic and Managerial Reporting

# Advancement Forum

## Project Director

A.J. Nagaraj  
Diana Barnes

## Practice Manager

Katie Stratton Turcotte

## Managing Director

Elizabeth Rothenberg

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# Distinguishing Strategic and Managerial Dashboards

## High-level Versus Day-to-Day

The strategic dashboard and managerial dashboard are familiar concepts to many advancement leaders and yet the lines between them are often blurred. Traditionally, the strategic dashboard is used to report high-level, advancement office progress to external audiences like the board, president, or other campus leadership. Managerial dashboards are internal documents used to oversee and guide performance of staff (e.g., activity levels, fundraiser totals). With such different aims, they contain different data points and use different formats.

### Key Differences Between Strategic and Managerial Dashboards

	Strategic Dashboards	Managerial Dashboards
<b>Intended Audience</b>	University Board, President	Director of Major Giving, Major Gift Officers, Vice President of Advancement, Associate Vice President
<b>Timeline</b>	Quarterly (at minimum)	Monthly, weekly, or daily
<b>Medium</b>	Emailed report	Emailed report or independently accessible dynamic system
<b>Purpose</b>	<ul style="list-style-type: none"> <li>• To demonstrate progress towards annual or campaign goal</li> <li>• Possibly highlight areas for alterations in resource allocation</li> </ul>	<ul style="list-style-type: none"> <li>• To demonstrate progress towards intra-office goals</li> <li>• To update managers on staff performance</li> <li>• To keep staff abreast of their own progress towards individual goals</li> </ul>

#### For More on Metrics

EAB's publication, Making Meaning of Metrics: Leveraging Accountability and Analytics to Enhance Fundraiser Productivity, further explores metric selection, metric system implementation, and best-practice dashboard case studies.

Source: EAB interviews and analysis.

# Strategic Dashboard Compendium

## Providing High-Level, Advancement-Wide Information

Through our research we have compiled a number of common strategic dashboard metrics in three categories: fundraising totals, investment, and participation. Due to these dashboards' external audiences, the metrics focus on production and shop efficiency. To help advancement offices make their strategic dashboards clear and persuasive, we have also included best practices in dashboard design. See the dashboard samples we have included on the following pages for examples of these design tips in action.

### Sampling of Strategic Dashboard Metrics



#### Fundraising Totals

- Total campaign donations
- Donations by monetary level
- Donations by campaign pillar
- Donations by school/unit
- Donations by donor type (e.g., alumni, faculty, foundation)
- Donations by monetary level
- Percent of donations restricted/unrestricted
- Donations by region
- Gift pipeline
- Type of donations (e.g., cash, pledge, endowment)
- Donations to the annual fund



#### Investment

- Cost to raise a dollar
- Return on investment
- Advancement expenditure
- Development expenditure



#### Participation

- Number of donors
- Number of alumni donors
- Donations from board

### Best Practice Design Checklist

- Organize your dashboard into categories to guide the eye of the reader through the larger themes (e.g., Total Dollars, Investment, Donors)
- Begin with the highest-level information as a summary, then allow for deeper exploration of the data by providing filters for different categories (e.g., department, campaign pillar) or using the additional pages for more specific, unit-level information.
- Use bar charts and line graphs where you can; visualizations are more compelling and easier to understand than text.
- Include data on past years to contextualize current performance and allow for tracking of long term trends.
- When slicing one number (e.g., production) by multiple variables (e.g., type of donor, gift size), locate the displays near each other so that trends and outliers can be compared with one another.
- Display progress on metrics with a goal marker to communicate how far is left to go.
- Color-code your graphs and charts. Remain as consistent as possible with regards to which color represents which category.

Source: EAB interviews and analysis.

# Strategic Dashboard Exemplars

We have provided examples of strategic dashboards from George Washington University, California Institute of Technology, and the California State University System. We've chosen these for their extensive use of data visualization, as opposed to just a spreadsheet of numbers, because they give a quick yet rich view of multiple data points. Note how they contain little fundraiser activity data, information that is not typically of concern to a board of trustees. Instead the focus is on comparison of performance year-over-year broken out across strategically important categories (e.g., level of gift, designated unit, campaign use).

## Exemplar One

George Washington University's Strategic Dashboard



Portray production over long time periods to explore long term trends

Marks progress (blue) against goal (red)

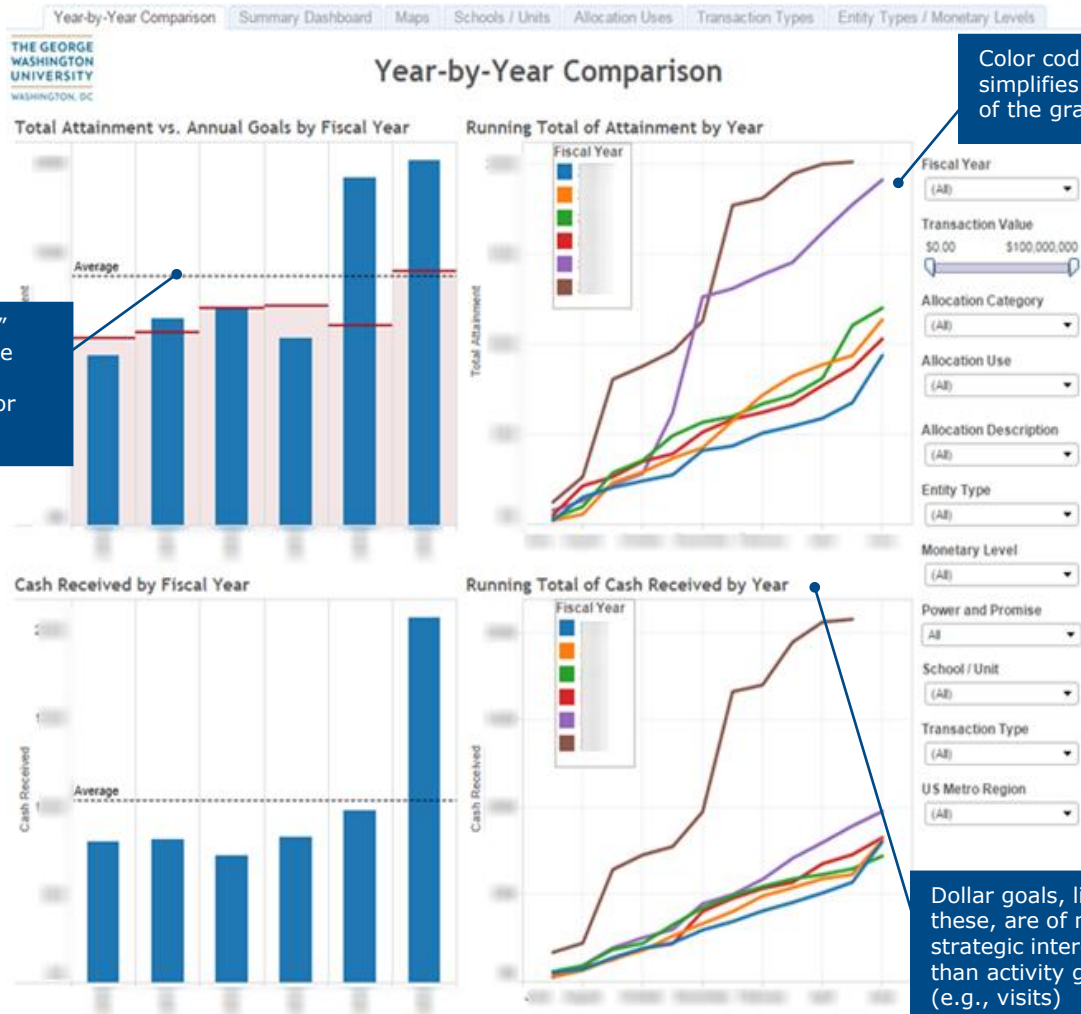
Can be filtered by fiscal year, transaction value, campaign pillar, unit, etc.

Reveals trends in data according to type of donor and campaign pillar and use allocation

The same metrics sliced by different variable are located next to one another for easy comparison

Source: EAB interviews and analysis.

George Washington University's Strategic Dashboard (cont.)



Color coding simplifies reading of the graphs

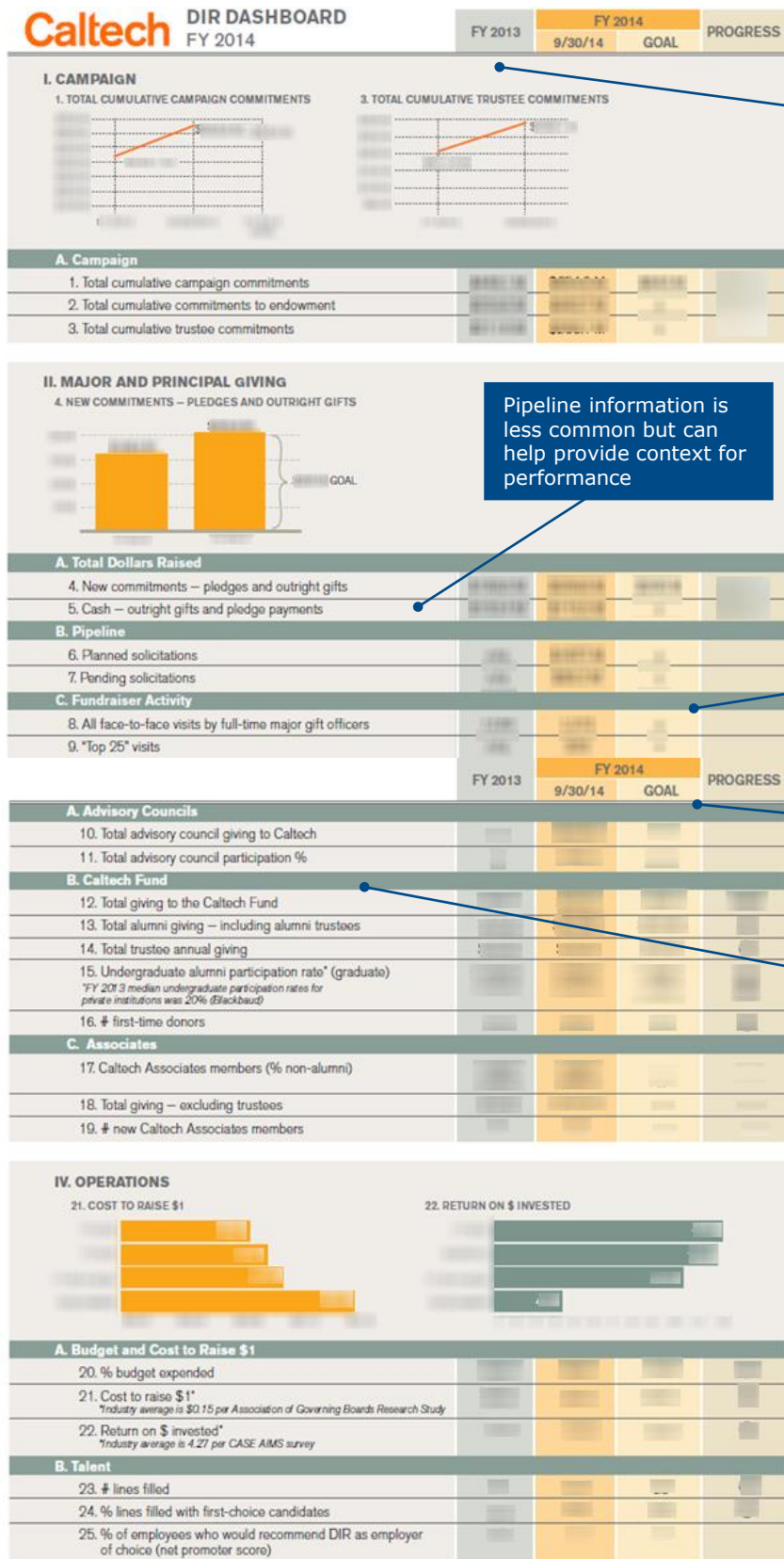
"Average" dotted line provides context for results

Dollar goals, like these, are of more strategic interest than activity goals (e.g., visits)

Source: EAB interviews and analysis.

## Exemplar Two

### California Institute of Technology's Campaign Dashboard



Comparison against the previous year

Pipeline information is less common but can help provide context for performance

Strategic dashboards typically do not include activity metrics

Provide context for performance by including goal

Metrics broken out by category help guide the reader

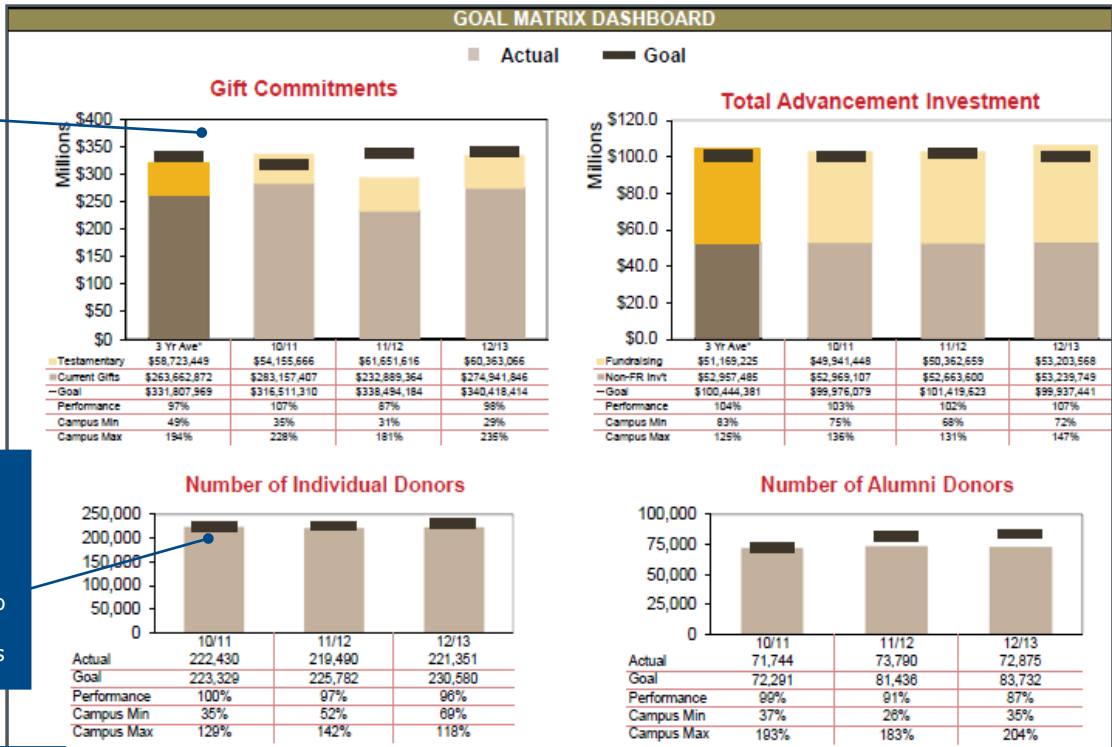
Source: EAB interviews and analysis.



# Exemplar Three

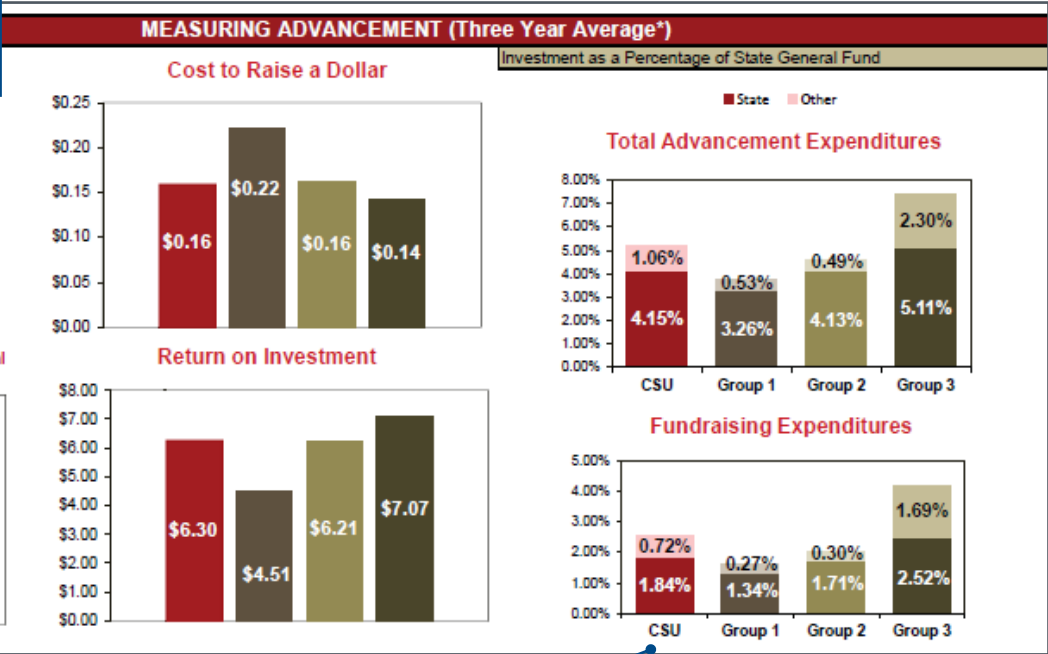
California State University System Dashboard

Compares average to goal



Provides a three year average to smooth out anomalous years, but also provides year by year details

Strategic dashboards may compare against peer groups, managerial typically do not



Gift Commitments per FTE Fundraising Professional

Category	Value
CSU Average	\$1,273,476
Peer Group 1	\$829,672
Peer Group 2	\$1,119,776
Peer Group 3	\$1,603,125

Highlights state contributions within overall advancement funding

Source: EAB interviews and analysis.

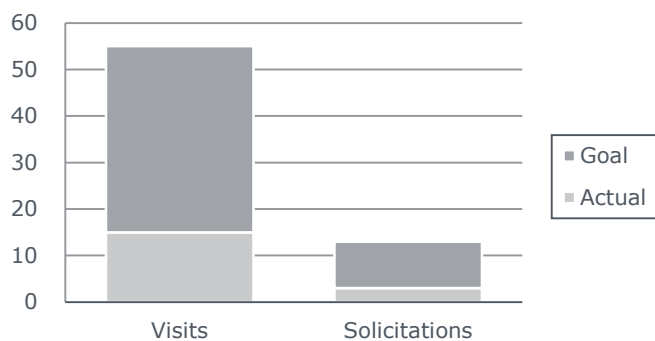
# Choosing the Metrics for Your Managerial Dashboard

## Focus on Metrics Tailored to Your Institutional Needs

### Activity Metrics Train Officers to Get Out on the Road

Advancement shops that are new, in a very early campaign stage, or focusing on building fundraising skills in their employees typically focus their dashboards on activity metrics. A dashboard that displays progress towards a monthly visit goal, for example, is a great way to encourage fundraisers to “hit the pavement,” and conduct face-to-face meetings with their prospects.

### Sample MGO Activity Chart



Activity metrics demonstrate the behavior and time allocation of staff. Some advancement leaders prefer activity metrics to results because they represent only what is within the fundraiser’s control, because of which they more accurately measure productivity of a shop during times of economic downturn. Still, as activities tend to emphasize quantity over quality they can lead to lower quality activities (e.g., “chasing the numbers”). Through our research we uncovered a wealth of activity metrics in use. A sample of the most frequently used metrics can be found below. Typically only three to four are chosen depending on the needs of the office.

### Sample Activity Metrics

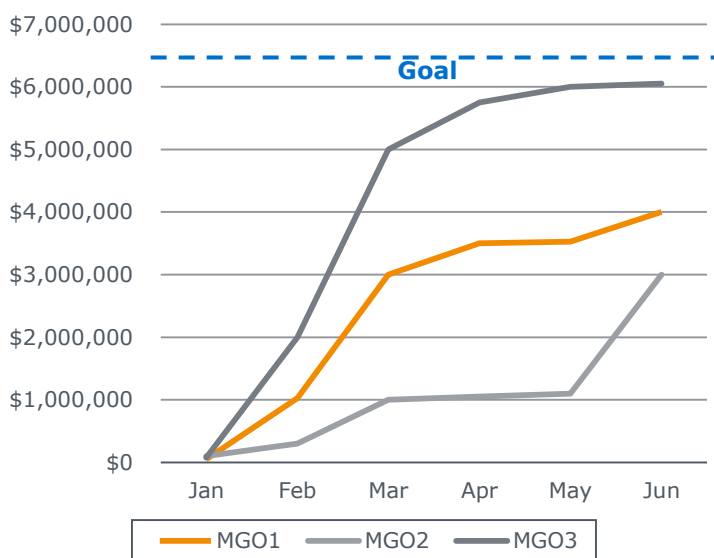
- Visits
- Solicitations
- Size of solicitations
- Contacts
- Unique visits/Prospect pool penetration
- Prospects identified
- Assists
- Contacts in each stage of the pipeline
- Written strategies
- Stewardship contacts
- Trustee interactions

Source: EAB interviews and analysis.

## Outcome Metrics Drive Competition and Focus Officers on Delivering Results

More mature advancement operations or those in the final stages of a campaign may prefer to focus their fundraisers on results or outcome measures (e.g., gifts closed, dollars raised, average gift closed). These displays can reveal plateaus in fundraising and stimulate positive competition amongst frontline fundraisers to close the gap between current production and a year end goal.

### Sample MGO Production Chart



Results metrics focus fundraisers on the ultimate goal of the advancement shop: raising money for the institution. They also help demonstrate the return on investment of the fundraisers and focus staff on high quality interactions that lead to proposals submitted and closed gifts. From our research we collected the following common outcome metrics. Only two to three are typically used at a time.

### Sample Outcome Metrics

- Gifts closed
- Dollars raised
- Average gift size
- Conversion rate
- Donor satisfaction
- Annual fund upgrades

Source: EAB interviews and analysis.

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## Focus on Metrics Tailored to Your Institutional Needs

The metrics appropriate for your institution depend on a number of factors including the institution's history in advancement, staff maturity, and office culture. Many administrators also differ in opinion regarding the appropriate emphasis of metrics. Should we prioritize results or should we prioritize the intermediate actions? Should we stress dollars raised or good fundraising behaviors? Regardless of the framework a CAO selects, what is most important is an understanding that the strategic use of metrics by management with staff will inflect behavioral change and influence the production of the office.

### Activity vs. Outcome Metrics

#### If...

- Advancement shop is new
- MGOs are not as skilled
- MGO results are not improving
- Advancement shop is far from goal
- Focus is long-term



#### Then...



#### Focus on Activities

#### If...

- Advancement shop is mature
- MGOs are highly skilled
- MGO results are improving
- Advancement shop is near goal
- Focus is short-term



#### Then...



#### Focus on Outcomes

In our research we found that most institutions balance their metrics system by including a few of each: activities and outcomes. For example:

- Number of visits
- Number of solicitations
- Dollars raised
- Percent of portfolio visited

This should ensure that any negative behaviors created by focus on one type of metric or the other is counterbalanced.

Source: EAB interviews and analysis.

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## Create Metric Ratios to Reveal Training Opportunities

Although many of the most common metrics are listed above, often the most powerful insights can be found when these metrics are put in conversation with one another. Creating ratios out of already collected key performance indicators can reveal trends and highlight areas for improvement.



### Pool Coverage



$$\frac{\# \text{ of Unique Visits}}{\# \text{ Total Prospects}}$$



### Effective Use of Visits



$$\frac{\# \text{ Total Visits}}{\# \text{ Asks}}$$



### Yield Rate



$$\frac{\# \text{ Asks}}{\# \text{ Major Gifts}}$$



### Accurate Ask Estimates



$$\frac{\text{Ask Amount}}{\text{Gift Amount}}$$

If the total number of visits over the number of asks is too high, this may prompt managers to initiate training sessions on guiding the conversation towards an ask. If the number of asks over the number of major gifts is too high this may indicate that fundraisers are asking too soon or overestimating prospect capacity. When compared against each other these metrics often create more actionable insights.

# How Transparent is Too Transparent?

## Selecting the Audience for Your Dashboard

Performance transparency, or the amount of staff that can see performance reports, varies greatly among institutions. Some advancement leaders feel that achievement of performance targets is information too sensitive to be widely shared. These decisions depend largely on what data and personal information is included in the dashboards.

### Advantages and Disadvantages of Dashboard Transparency

Pros	Cons
<ul style="list-style-type: none"><li>• Clear Understanding of performance expectations</li><li>• No secrets</li><li>• Best MGOs are often competitive</li><li>• Clarity of purpose</li></ul>	<ul style="list-style-type: none"><li>• Difficult to include context (e.g., variability in prospect quality)</li><li>• May breed jealousy among staff</li></ul>

### Transparency Increases Understanding of Performance and Drive to Reach Goal

Advocates for increased transparency publish weekly reports, emailing them to the entire staff or displaying them on screens during development meetings. They argue this visibility in peer performance can create positive competition and pressure to perform. It creates opportunity for fundraisers to share their successes and ask for advice. Finally it, allows fundraisers to understand how their performance fits into the context of the office.

### Less Transparent Offices Use Dashboards for One-on-One Discussions With Staff

Other advancement shops prefer to use managerial dashboards only as tools for managers to oversee their staff and do not share the dashboards with fundraisers themselves. Managers can see the performance of those who work for them, notifications, warnings, and trends and use these to inform their conversations with staff. This ensures fundraisers benefit from dashboards' insight, but don't feel that their performance is being displayed to peers without an opportunity for them to explain their behavior.

Source: EAB interviews and analysis.

# Designing Your Managerial Dashboard

## Top Tips for Making Your Dashboard Interesting and Useful

The most important rule for dashboard design is that it be both compelling and concise. This means that only the most salient elements should be selected and visualizations should be used whenever possible to interest the viewer.

The dashboards below demonstrate some of EAB's 'top tips' for design. Although some of those displayed are part of analytics platforms (e.g., ADVIZOR) or use other visualization tools (e.g., Tableau) they demonstrate best practices that are easily replicable.

### ADVIZOR's MGO Management Dashboard



#### 1 Summary Numbers

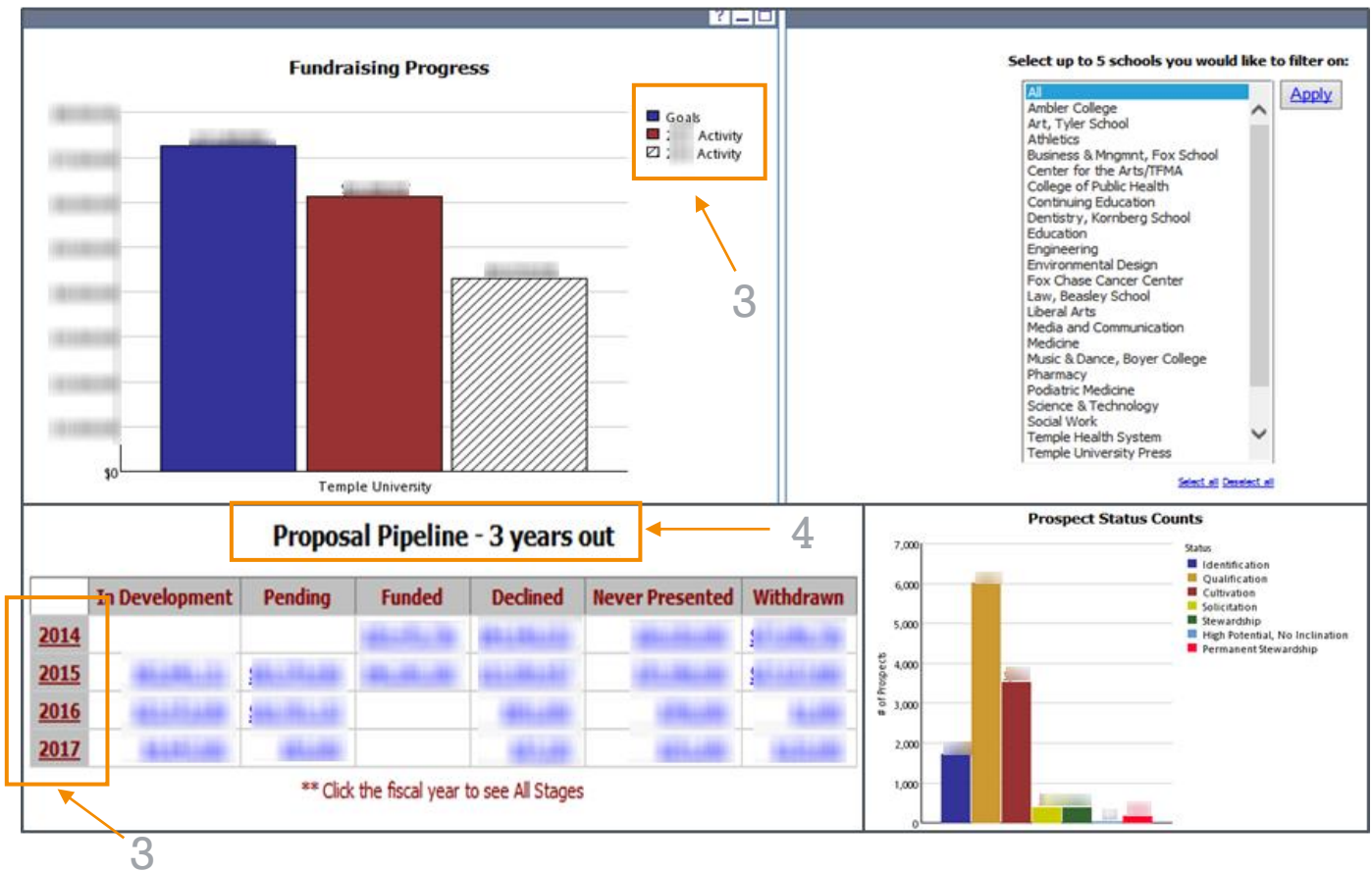
The most important figures should be highlighted and easily visible. These provide a summary for the audience and context to understand the following more specific metrics that follow. These numbers are usually totals such as total dollars solicited, dollars closed, number of proposals, and number of prospects. They provide a very high-level perspective on the shop.

#### 2 Goal Markers

One of the most frequently overlooked but easy to implement elements of a good dashboard is the context provided by goal markers. These lines allow a fundraiser and their manager to easily understand how far they are from goal and identify any possible obstacles. For example, knowing that an fundraiser has conducted 10 visits this month is much less helpful than knowing that a fundraiser is 10 visits behind where they should be at this point in the month. Of course this makes goal setting at the beginning of the year all the more important.

Source: EAB interviews and analysis.

## Temple University's Management Dashboard



### 3 Year-Over-Year Performance

Although not necessary for every metric displayed on the dashboard, year-over-year performance can be helpful information to guide activity and monitor growth of the advancement shop. Performance over the last few years can help MGOs and managers better understand current performance and identify areas where MGOs are falling behind.

### 4 Proposal Pipeline

The proposal pipeline is one of the most difficult to visualize as it requires capturing movement of a prospect and proposal through the stages of fundraising. Typically institutions turn to an Excel chart such as the one seen above at Temple University. Each cell contains the dollar amount in each category (e.g., In Development, Pending, Funded, Declined, Never Presented, Withdrawn). While this can help managers foresee fundraising totals, it still struggles to capture the number of proposals in each stage and the status of each proposal.

#### For More on Metrics

EAB's publication, *Making Meaning of Metrics: Leveraging Accountability and Analytics to Enhance Fundraiser Productivity*, profiles a number of innovative proposal pipeline displays.

Source: EAB interviews and analysis.



# Quick Starter Guide for Managerial Dashboards

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## Step 1: Select Your Metrics

### **Activities or Results** *(review pages 10-12)*

Select approximately five metrics: activities, results, or a mixture of both. Pay close attention to the resultant behaviors associated with each.

### **Ratio Metrics** *(review page 13)*

Consider metric ratios (e.g., yield, pool coverage) to inform fundraiser training.

## Step 2: Select Your Audience

### **Transparency** *(review page 14)*

Consider how dashboard transparency will affect your particular staff's culture and its effect on productivity, competition, and collaboration.

## Step 3: Design Your Dashboard

### **Summary Numbers** *(review page 15)*

Highlight the most important and high-level numbers at the beginning of the dashboard.

### **Goal Markers** *(review page 15)*

Make sure to display progress towards the goal set for each metric so fundraisers understand how far they have left to go.

### **Year-Over-Year Performance** *(review page 16)*

Provide previous year performance data to contextualize current performance.

### **Proposal Pipeline** *(review page 16)*

Consider a visualization of each fundraiser's pipeline so that they can identify next steps, stagnant solicitations, and overdue actions.

### **Align With Best Practice Design Tips** *(review page 9)*

Organize your dashboard so that it is both attractive and simple to navigate.



EAB

Education Advisory Board

2445 M Street NW, Washington DC 20037  
P 202.266.6400 | F 202.266.5700 [eab.com](http://eab.com)