



INSIGHT  
PHILANTHROPY  
RESULTS

# EXPLORE

PD25

*New Depths*

August 19-22, 2025

Hilton Baltimore Inner Harbor Hotel, Baltimore, Maryland



# FROM 0 TO 100 IN POWER BI

A Newbie's Journey to Create a Dashboard for Fundraisers and Leadership

**EXPLORE**  
PD25  
*New Depths*

While you're waiting, complete your session evaluations in the mobile app!



# FROM 0 TO 100 IN POWER BI

A Newbie's Journey to Create a Dashboard for Fundraisers and Leadership

**EXPLORE**  
PD25  
*New Depths*





# ABOUT ME

- James Madison University, 2008, BS in Anthropology/Archaeology
- Virginia Commonwealth University, 2010, MA in Art History and Museum Studies
- Analyst, Prospect Development at the Colonial Williamsburg Foundation
- Started at CWF in 2013 in Gift Processing
- Moved to Prospect Development in 2023
- NO prior experience with Power BI and only basic Excel knowledge



# ABOUT CWF



- Private, 501(c)3 educational institution
- World's largest living history museum
- 4 prospect development staff, 16 frontline fundraisers, including 3 principal gift officers
  - Major Gift - \$100K+
  - Principal Gift - \$500K+
- Nov. 2023 database conversion from Millennium to Tessitura
- The Power of Place
  - In the 5th of our 6-year comprehensive campaign, ~77% to \$600M goal



# AGENDA



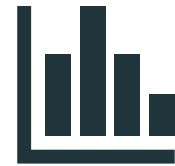
Assignment



Resources



Process



Results





# ASSIGNMENT





# The Assignment

Create a Proposal  
Pipeline Dashboard in  
Power BI for use by  
Leadership and the  
Frontline Fundraisers

# My Response







# What dashboards did we already have?



# FUNDRAISER METRICS DASHBOARD

Select a Fundraiser

Press and hold Ctrl key to multi-select

All

The Colonial Williamsburg Foundation

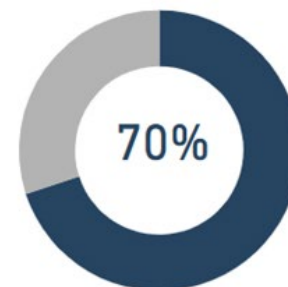
Fundraiser Metrics

Right click on Dollars Raised Actual value and select "Drill Through > Dollars Raised Details" to see breakout of Primary Solicitor and Secondary Solicitor dollars.

Fundraiser	Dollars Raised % to Goal	Dollars Raised Goal	Dollars Raised Actual	Dollars Raised Linked % to Goal	Linked Revenue Actual	Solicitations % to Goal	Solicitations Goal	Solicitations Actual	Clos % to
	257%	\$2,000,000	\$5,134,807	4%	\$87,807	50%	10	5	
	171%	\$5,000,000	\$8,525,200	44%	\$2,203,200	70%	10	7	
	129%	\$2,000,000	\$2,575,000	103%	\$2,050,000	10%	10	1	
	84%	\$2,000,000	\$1,688,200	82%	\$1,635,000	100%	10	10	
	52%	\$4,500,000	\$2,347,000	47%	\$2,098,500	120%	10	12	
	18%	\$7,500,000	\$1,345,600	18%	\$1,317,368	70%	10	7	
	14%	\$5,000,000	\$700,000	14%	\$700,000	7%	15	1	
	13%	\$1,000,000	\$128,000	13%	\$128,000	40%	10	4	
	8%	\$5,000,000	\$400,000	7%	\$356,930	40%	5	2	
	6%	\$1,000,000	\$62,500	4%	\$37,500	60%	10	6	
	2%	\$5,000,000	\$80,523	2%	\$80,523	20%	5	1	
			\$864,345		\$755,000			6	
		\$3,000,000					5		
		\$150,000					3		

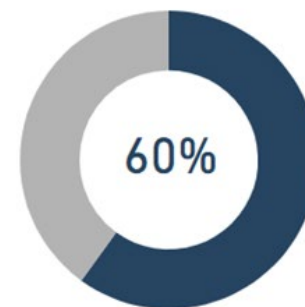
## Solicitations

Proposals solicited in current FY as Primary Solicitor only



### Closed Gifts

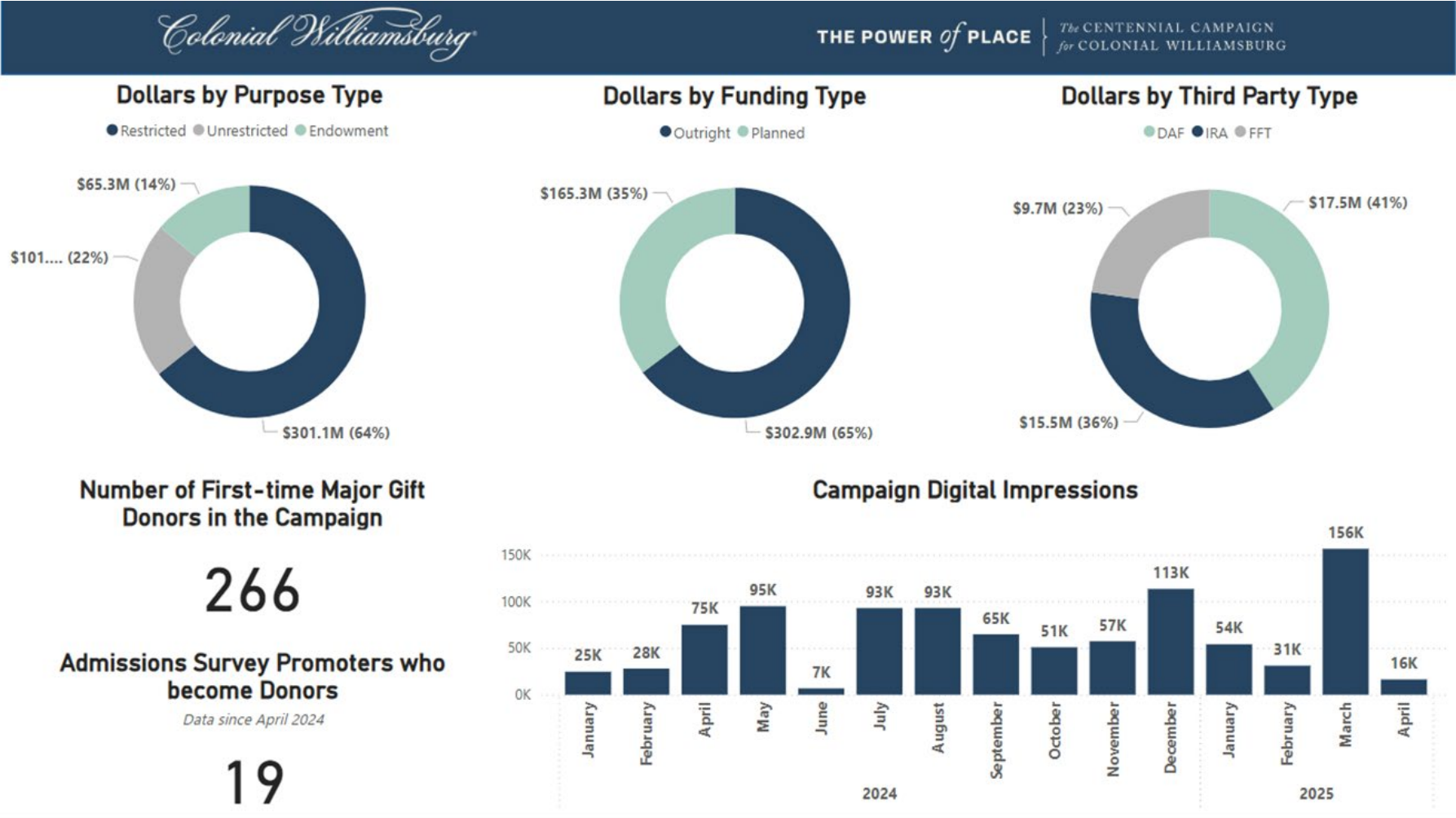
Accepted-Documented proposals committed in current FY as  
Primary Solicitor only







# CAMPAIGN METRICS DASHBOARD





# RESOURCES







# How did I learn Power BI?

- **Dashboard Access**

- CWF already had access to Power BI
- Free license vs **Pro license** vs Premium per-user (PPU) license
- Pro - the most popular for small teams and businesses. It enables users to share reports, collaborate in real-time, and integrate Power BI with Microsoft tools like Teams.
- <https://capitalizeconsulting.com/power-bi-licenses-explained/>

- **Online Resources**

- Coursera/LinkedIn Learning/Microsoft Learn
- Microsoft Certificates
- YouTube Videos
- Online Forums
- Chat GPT

- **Find a Mentor**

- Colleagues
- Put a request out to PRSPCT-L

- **PRACTICE**





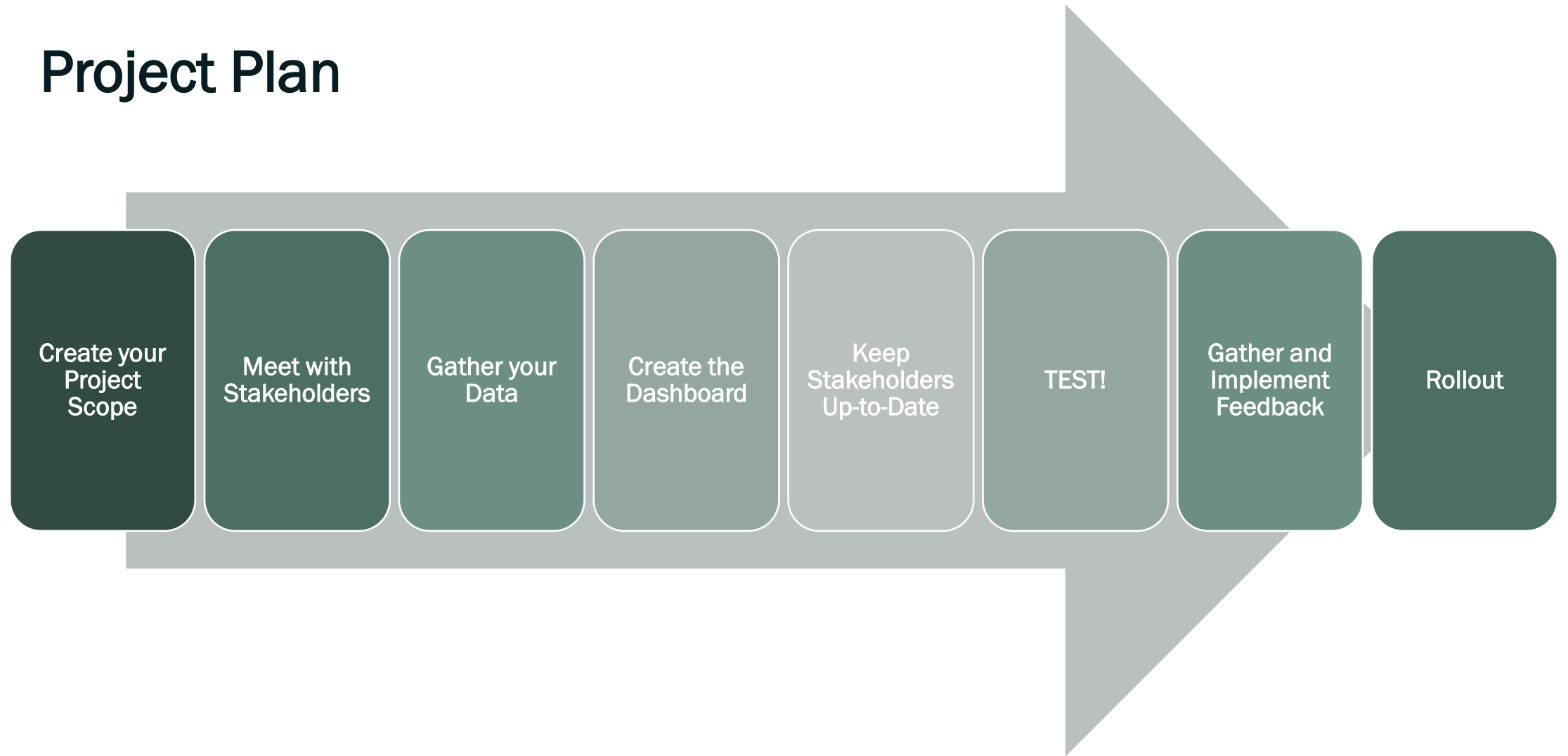
# PROCESS







# Project Plan





# Project Scope

- What is the business need/impact?
  - Up-to-date transparent view of pipeline
- Who is the audience?
  - Leadership, Fundraisers, and Prospect Development
- What is the value?
  - Pipeline gap analysis and a user-friendly way for fundraisers to manage their proposals

The Colonial Williamsburg Foundation

PROJECT SCOPE

PROJECT NAME	Proposal Pipeline Dashboard
POINT OF CONTACT	Director
AUTHOR	Janelle Wilson
DATE	2024

SCOPE OF WORK

*What does the project entail? What is the business need / impact? Who is the audience?*

Prospect Development will create a dashboard with functionality to provide users with real time analytics of fundraiser proposal pipelines. The dashboard will allow analysts, fundraisers, and leadership to easily manage proposal data and readily interpret the progress towards individual and campaign goals in the Foundation's efforts to raise of \$85 million by the end of the fiscal year.

PROJECT DELIVERABLES

*Note the tangible products / services resulting from this project.*

The project result will be an interactive Power BI dashboard that draws from live data in Tessitura and will provide individual and aggregate proposal figures to fundraisers, leadership, and analysts. This service will present an up-to-date transparent view of the pipeline with proposal gap analysis visuals allowing fundraisers to quickly monitor their progress toward campaign and individual goals and manage their proposals in multiple aspects.

STAKEHOLDERS

NAME & TITLE	ROLE & RESPONSIBILITY
Analyst	To create the dashboard with the guidance of the Director of Prospect Development
Director	To provide guidance and assistance in the creation of the dashboard
AVP	To provide reviews and feedback of the dashboard throughout the process
Data Warehouse Eng III	To create the Power BI data source for the dashboard and partner as the Power BI subject matter expert
Fundraisers	To assist with beta testing and provide user feedback of the dashboard prior to go live
Senior Leadership	To provide user feedback during later development phases





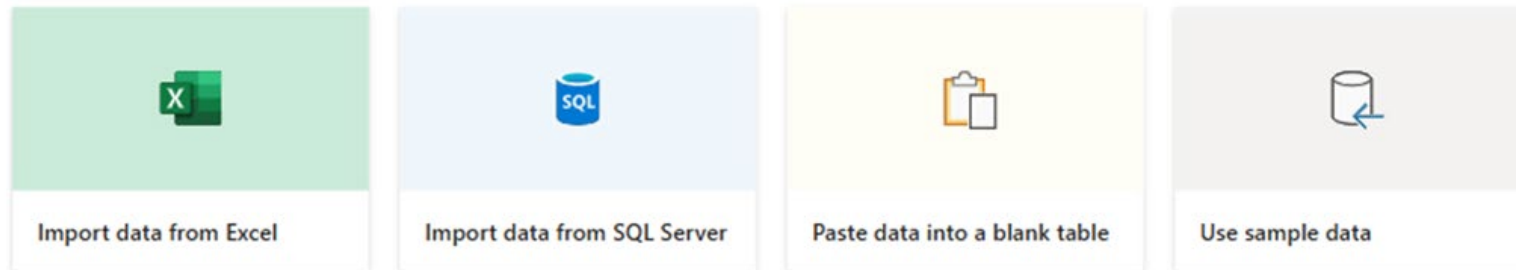


# Data

- Gather your data from Excel or external source
- Import into Power BI
- Create your data model

## Add data to your report

Once loaded, your data will appear in the **Data** pane.



[Get data from another source →](#)





# Tessitura Data Fields

CAMPAIGN *		DESIGNATION *		FUND			
<div>-2025/Restricted (Plan) × ▼</div>		<div>Randolph Stables × ▼</div>		<div> ▼</div>			
<hr/>							
TYPE *		STATUS *		PLAN SOURCE *			
<div>Major Gift × ▼</div>		<div>Cultivation × ▼</div>		<div>PD Referral × ▼</div>			
PRIORITY		PROBABILITY *		START DATE		COMPLETE BY	
<div> ▼</div>		<div>75.00 % ▲ ▼</div>		<div>07/07/2025 📅</div>		<div>mm/dd/yyyy 📅</div>	
<hr/>							
ASK		GOAL		RECORDED		CONTRIBUTION TOTAL	
<div>\$250,000.00</div>		<div>\$100,000.00</div>		<div></div>		<div></div>	





# Tessitura Data Fields

NOTES

7/7/2025 - Cultivate Ms. Wilson for gift to the Stables in 2025. She will be visiting in the Fall so set up a special tour to see the area and make sure to pass on updates about the project. Solicitation planned for Q3 with gift to be received by end of 2025.

ADDITIONAL FIELDS

STEPS

CONTRIBUTIONS

WORKERS

ASK DATE

GOAL DATE

RECORDED DATE

PROPOSAL STATUS

09/15/2025

11/01/2025

mm/dd/yyyy

Pending Solicitation

SUBPLAN

RELATES TO MAIN PLAN





# Table View

File Home Help **Table tools** Share

Name: Non Proposal Dollars

Manage relationships Relationships

New measure Calculations

Quick measure

New column

New table

Mark as date table Calendars

Structure

transaction_type_description	gift_type_description	Most Recent Step Date	Contribution Date	Days between Step and Gift	Contribution Amount	worker_customer_no	Step Type	
Gift		4/7/2022	4/11/2022	4	\$100	669612	Phone Call	left m
Gift		4/30/2021	5/7/2021	7	\$100	669612	Phone Call	thank
Gift		3/28/2022	4/27/2022	30	\$100	669612	Phone Call	thank
Gift		4/30/2021	5/27/2021	27	\$100	669612	Phone Call	thank
Gift		6/21/2019	8/6/2019	46	\$100	669612	Phone Call	Left n
Gift		12/8/2020	1/14/2021	37	\$100	669612	Phone Call	left th
Gift		4/30/2021	5/7/2021	7	\$100	669612	Phone Call	got n
Gift		4/30/2021	7/8/2021	69	\$100	669612	Phone Call	got n
Gift		4/30/2021	6/7/2021	38	\$100	669612	Phone Call	got n
Gift		7/26/2021	10/21/2021	87	\$100	669612	Phone Call	thank
Gift		7/26/2021	8/12/2021	17	\$100	669612	Phone Call	thank
Gift		6/11/2020	7/8/2020	27	\$100	669612	Phone Call	spoke
Gift		2/5/2021	2/11/2021	6	\$100	669612	Phone Call	left th
Gift		2/1/2022	2/2/2022	1	\$100	669612	Phone Call	thank
Gift		12/13/2021	2/11/2022	60	\$100	669612	Phone Call	thank
Gift		10/26/2020	11/16/2020	21	\$100	669612	Phone Call	left th
Gift		11/4/2020	12/31/2020	57	\$100	669612	Phone Call	left th
Gift		10/17/2019	1/14/2020	89	\$100	669612	Phone Call	re en
Gift		12/7/2020	2/23/2021	78	\$100	669612	Phone Call	no an
Gift		11/10/2021	12/9/2021	29	\$100	669612	Phone Call	thank
Gift		11/4/2020	1/21/2021	78	\$100	669612	Phone Call	left th
Gift		12/29/2020	2/10/2021	43	\$100	669612	Phone Call	thank
Gift		12/29/2020	3/18/2021	79	\$100	669612	Phone Call	thank

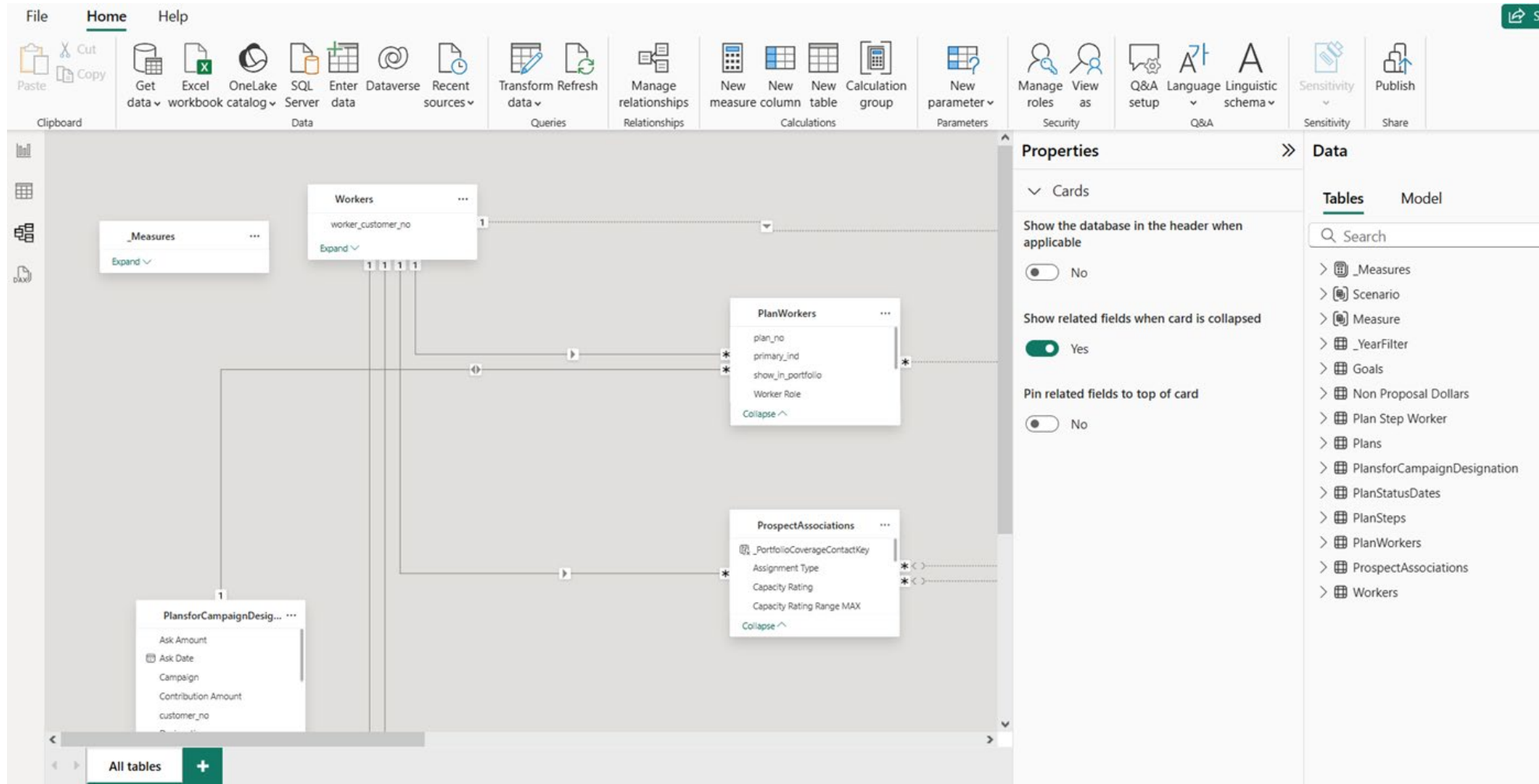
Data

Search

- > Measures
- > Measure
- > Scenario
- > \_YearFilter
- > Goals
- > Non Proposal Dollars
- > Plan Step Worker
- > Plans
- > PlansforCampaignDesignation
- > PlanStatusDates
- > PlanSteps
- > PlanWorkers
- > ProspectAssociations
- > Workers



# Model View



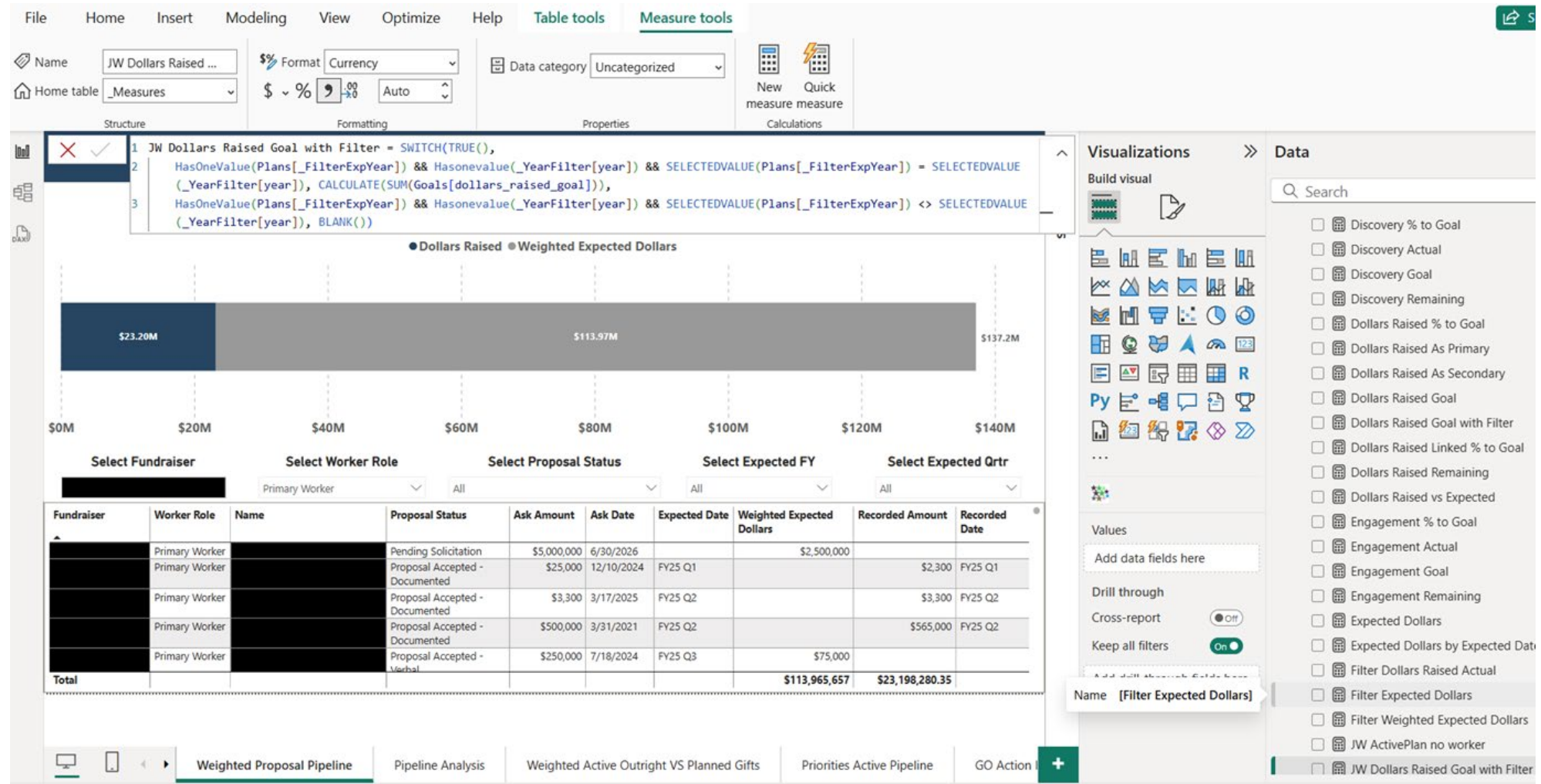


SALES			ITEMS		
Customer Number	Transaction ID	Cost	Transaction ID	Item Type	Quantity
1	76B	\$ 45.00	76B	Shoes	1
2	26LL	\$ 335.25	26LL	Bike	1
3	2B	\$ 10.99	2B	Book	1
4	1GH	\$ 15.67	1GH	Mug	3
5	4B	\$ 754.12	4B	Couch	1
6	779Q	\$ 66.54	779Q	Video Game	1
7	55MJ	\$ 12.35	55MJ	Notebook	2
8	34B	\$ 25.15	34B	Plate	4
<b>Sales</b> Customer Number Transaction ID Cost			<b>Items</b> Transaction ID Item Type Quantity		





# Report View



# Writing Measures with DAX

- Data Analysis Expressions (DAX) is a library of functions and operators that can be combined to build formulas and expressions in Power BI, Analysis Services, and Power Pivot in Excel data models (<https://learn.microsoft.com/en-us/dax/>)

```
1 Sum of Outright Weighted Expected Amounts =  
2 |  
3 CALCULATE(SUM(Plans[Weighted Amt]),  
4 Plans[Plan Type] IN {"CFR Gift", "Lead Annual Gift", "Major Gift", "Principal Gift"},  
5 Plans[Proposal Status] IN {"Response Pending", "Proposal Accepted - Verbal", "Pending Solicitation"},  
6 USERELATIONSHIP('PlanWorkers'[plan_no], Plans[Plan No.]), 'PlanWorkers'[Worker Role] = "Primary Worker")
```

# How do you show how many visits your fundraisers have left to meet goal?

Visits Remaining = IF([Visits Goal] > [Visits Actual], [Visits Goal] - [Visits Actual], 0)

IF(<logical\_test>, <value\_if\_true>[, <value\_if\_false>])

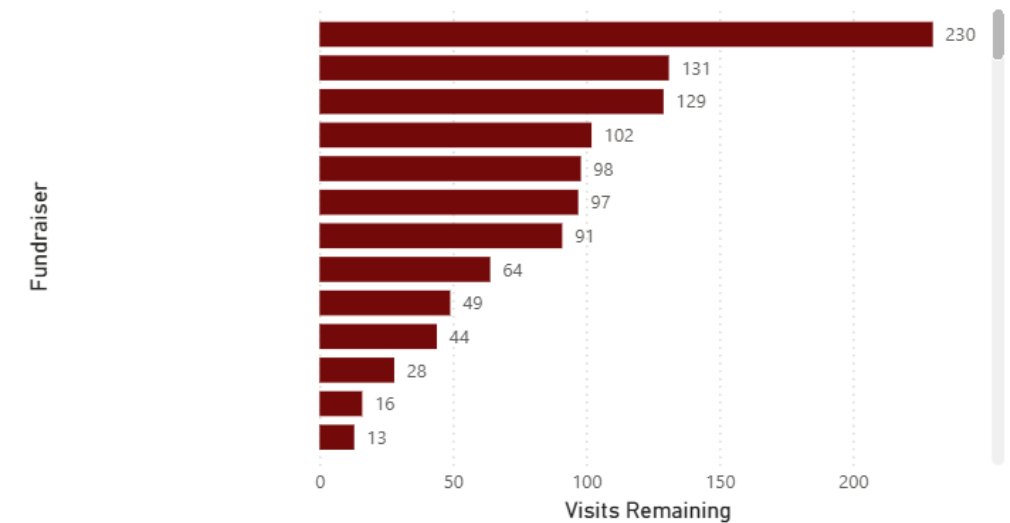
Checks a condition, and returns one value when it's TRUE, otherwise it returns a second value.

If the number of visits goal is greater than the number of visits completed...

If True - Then calculate the remaining (Goal-Actual)

If Not True – Then display 0

Visits Remaining by Fundraiser



\*Fundraiser names have been removed for privacy.





## Hurdles:

- Continuous changes and updates
- Broken data
- Delays to the project timeline
- Learning new skills on the job
- Still have routine job assignments
- Changing my own expectations





## Test!

- Have a selected group of users test for issues
- Incorporate feedback

## Leadership Review

- Have leadership provide feedback
- Make sure they have buy-in





# How did we ensure data privacy?

## Creating Row-Level Security

- Row-level security (RLS) with Power BI can be used to restrict data access for given users.
- You can configure RLS for data models imported into Power BI.
- You can define roles and rules within Power BI Desktop.

<https://learn.microsoft.com/en-us/fabric/security/service-admin-row-level-security>





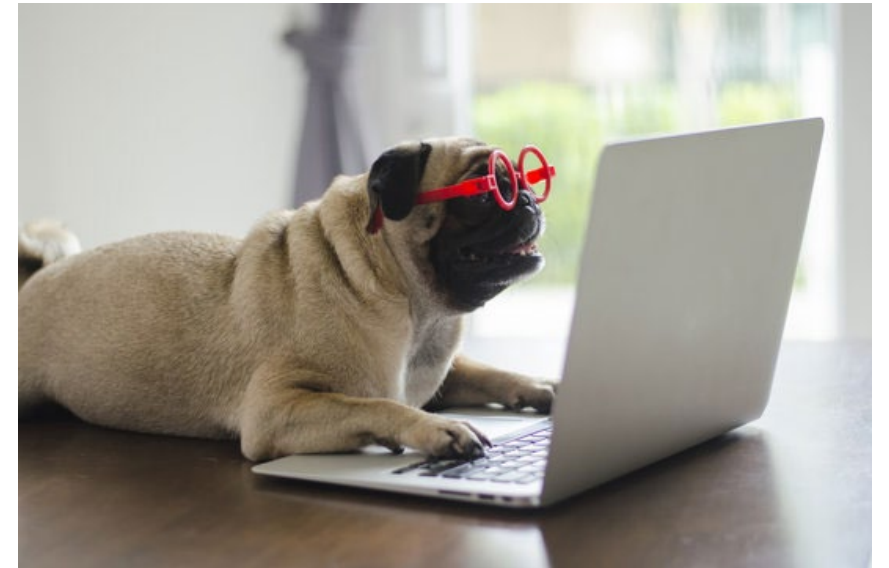


## It's done! Now what?

- Set up a meeting to release the dashboard to the whole team
- Make sure everyone knows who to contact with questions
- Celebrate!

## JK! It's not done.

- Continuous review and updates
- New ideas to be implemented
- You must be flexible!





# RESULTS

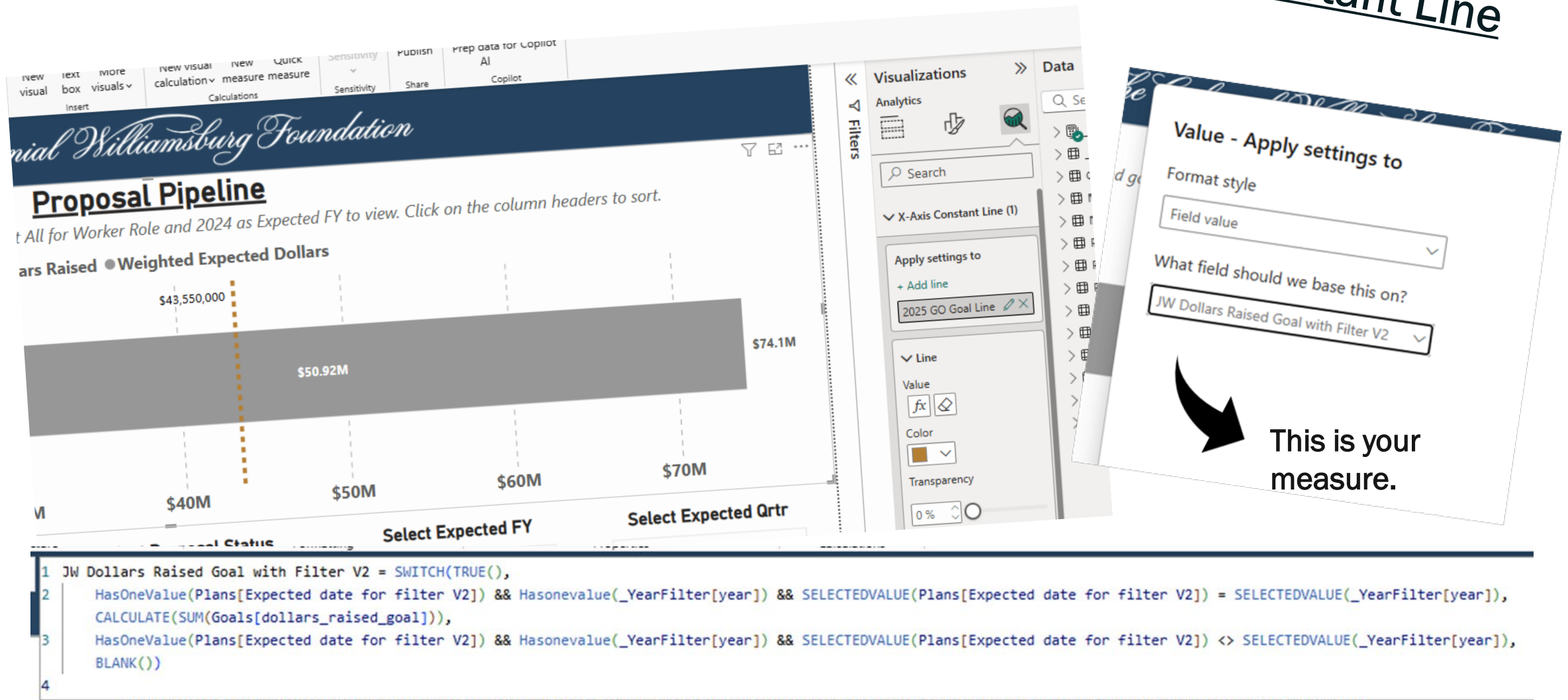




# Review of Dashboard



# TIPS AND TRICKS



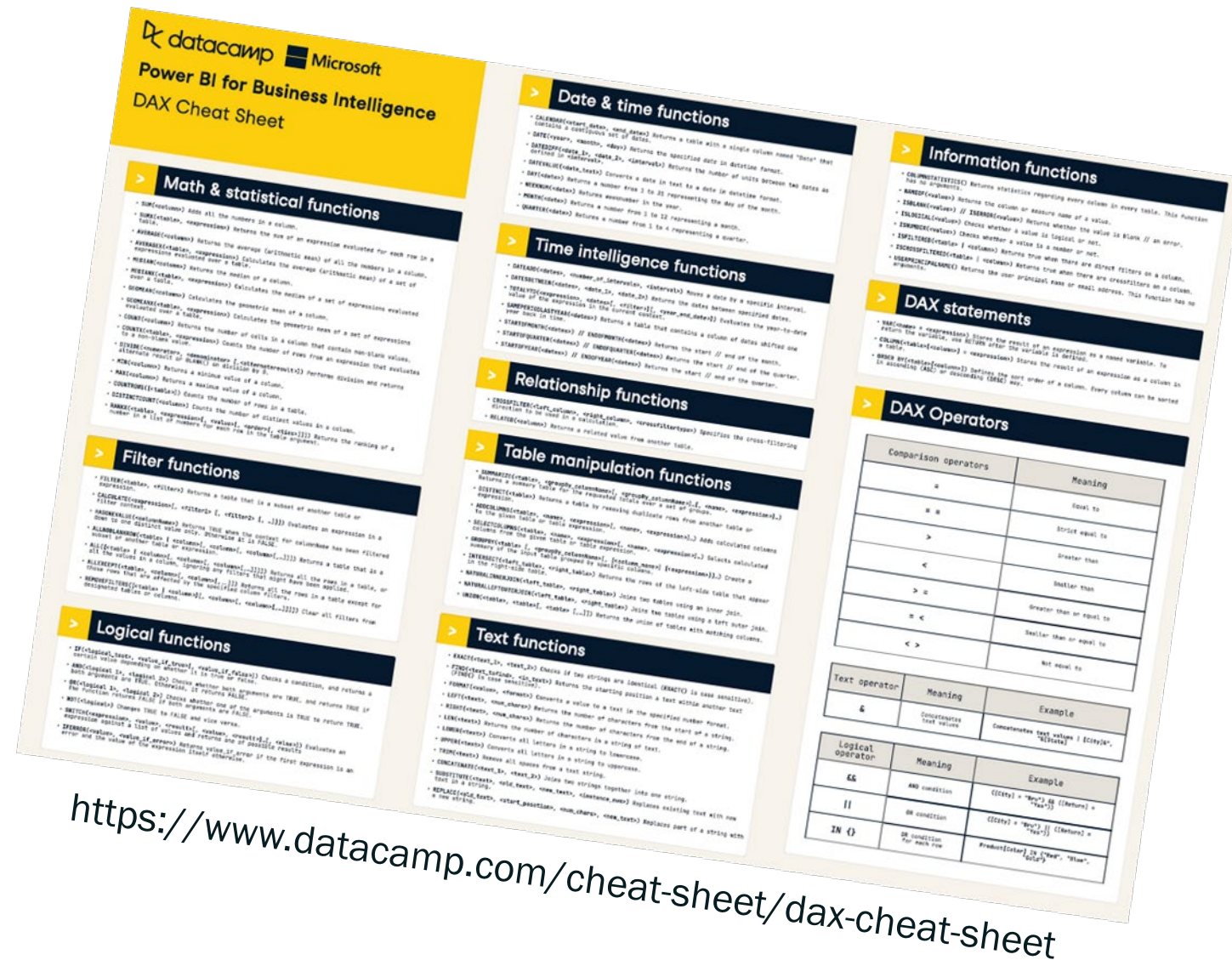


# TIPS AND TRICKS

## DAX Formulas

SWITCH(<expression>, <value>, <result>[, <value>, <result>]...[, <else>])

- Evaluates an expression against a list of values and returns one of possible results
- SWITCH(TRUE()...)
  - Can use for nested IF functions
- <https://p3adaptive.com/the-diabolical-genius-of-switch-true/>
- <https://blog.enterprisedna.co/using-switch-true-logic-in-power-bi-dax-concepts/>



<https://www.datacamp.com/cheat-sheet/dax-cheat-sheet>



# You can contact me at:

[jwilson2@cwf.org](mailto:jwilson2@cwf.org)

LinkedIn – Janelle Wilson





# THANK YOU!

Please complete your session  
evaluations in the mobile app.

