

# Powering Performance: Tracking KPIs and Donor Engagement with Power BI + StratusLIVE

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StratusLIVE

# MEET THE SPEAKERS



**Alicia Stevens**

Director of  
Customer Success  
StratusLIVE



**Robert Williamson**

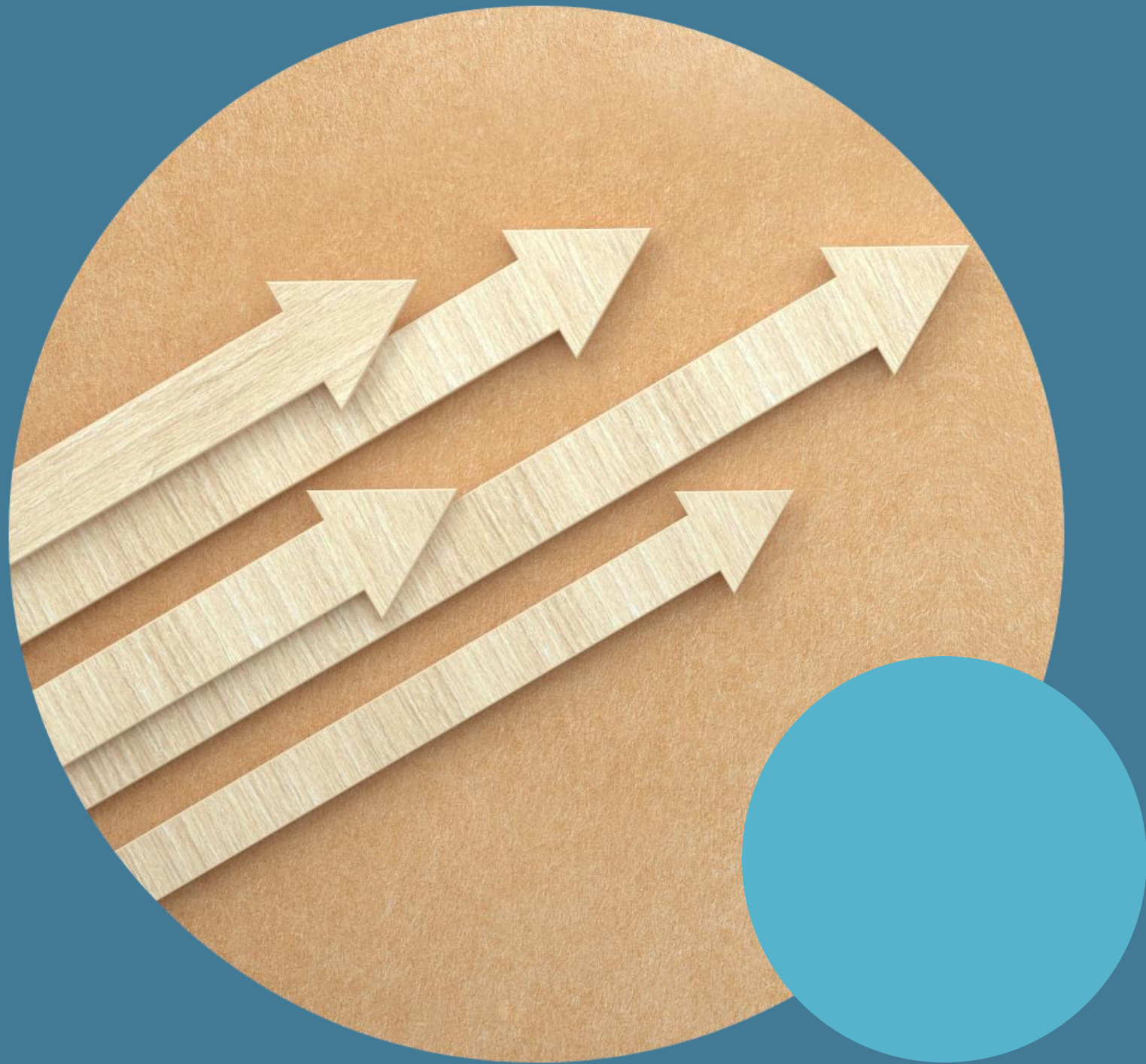
Director of Fundraising Operations and  
Digital Solutions  
United Way of Central and  
Northeastern Connecticut

# AGENDA

- About UWCNECT
- Revenue Growth Strategies
- Tracking Engagement
- Moves Management
- Power BI Dashboards







# REVENUE GROWTH

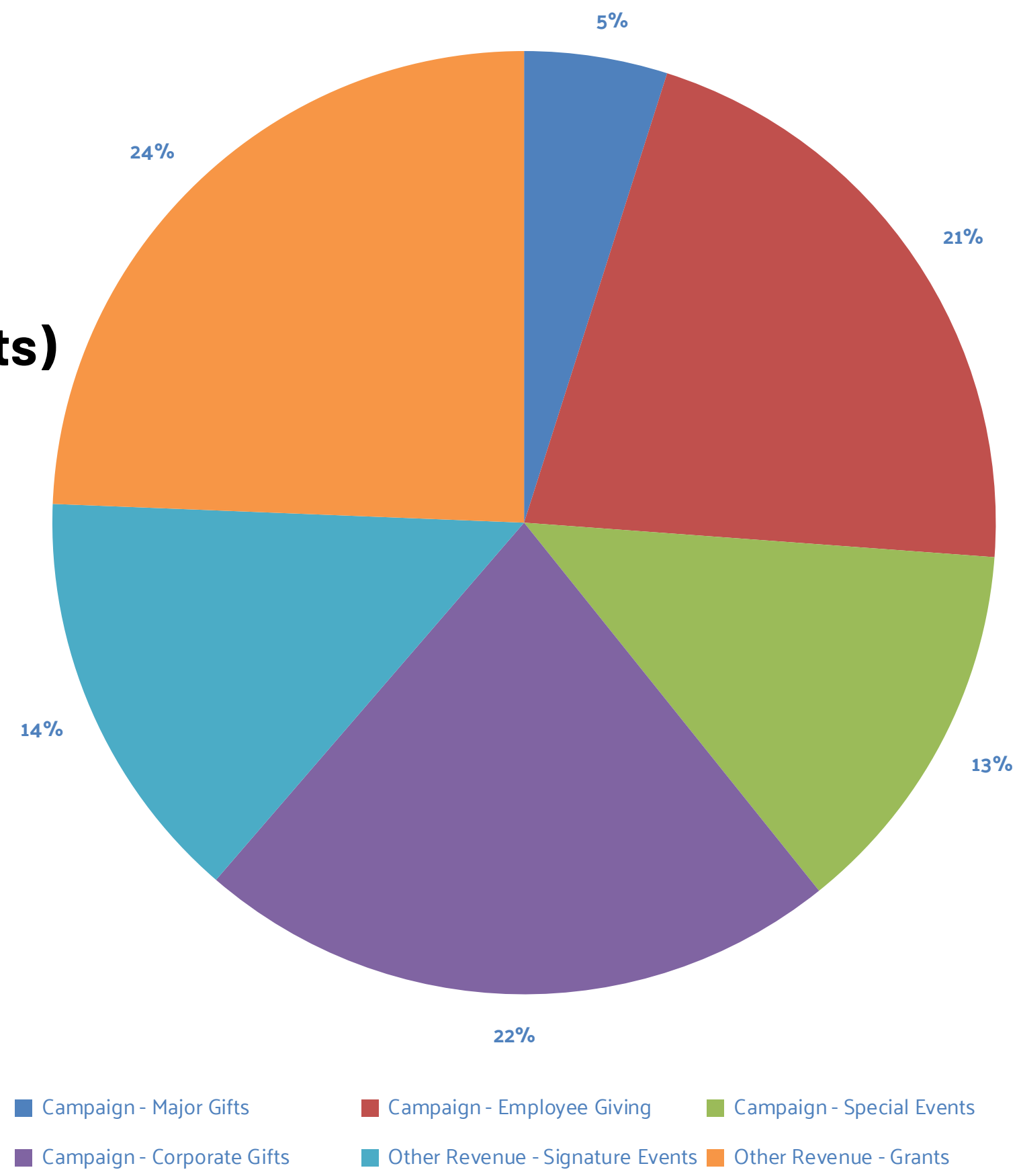
How are you focused  
on diversifying your  
revenue streams?

# SOURCES OF REVENUE

## Growth & Revenue Diversification

- Philanthropy (Leadership, Major & Planned Gifts)
- Corporate Special Events
- Signature Events
- Private Foundation Grants

Revenue by Channel



# PHILANTHROPY TARGETS

- 3 FTE Philanthropy Team
- 4 FTE Corporate Engagement Team

## Moves Management Targets

	Affinity Rating				
iWave Score	1	2	3	4	Total
1	172				172
2	121	200	1		322
3	1	59	109	191	360
4			1	18	19
Total	294	259	111	209	873

## Major Gifts Targets

	Capacity Rating				
iWave Score	1	2	3	4	Grand Total
1	155	17			172
2	282	37	2	1	322
3	186	156	17	1	360
4			10	9	19
Grand Total	623	210	29	11	873

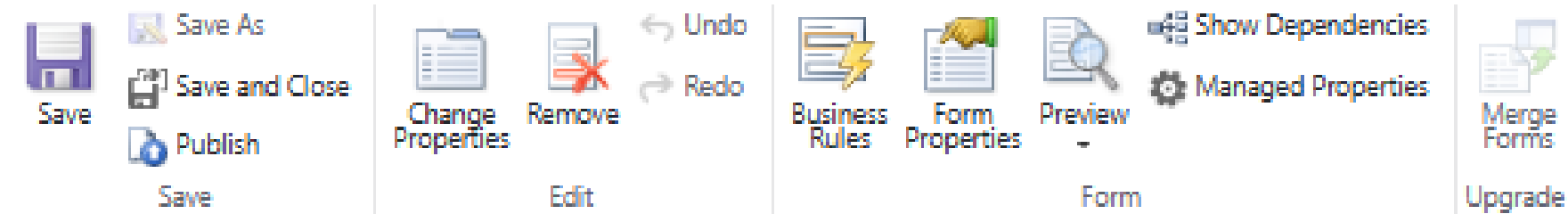


# TRACKING ENGAGEMENT

*Defining and  
Tracking  
Substantive  
Engagement  
Activities*



# TRACKING SUBSTANTIVE ACTIVITIES



Form headers now default to high density to display more data. Use the new form designer to edit header density. [Learn more](#)

Information  
Appointment

Solution: Default Solution  
Form: **Appointment**

Appointment

General Information

Subject

Subject

Required

Required Attendees

Optional

Optional Attendees

Location

Location

Show Time As

Status Reason

Substantive

Substantive

Field Explorer

Filter Custom Fields

☐ Only show unused fields

Substantive

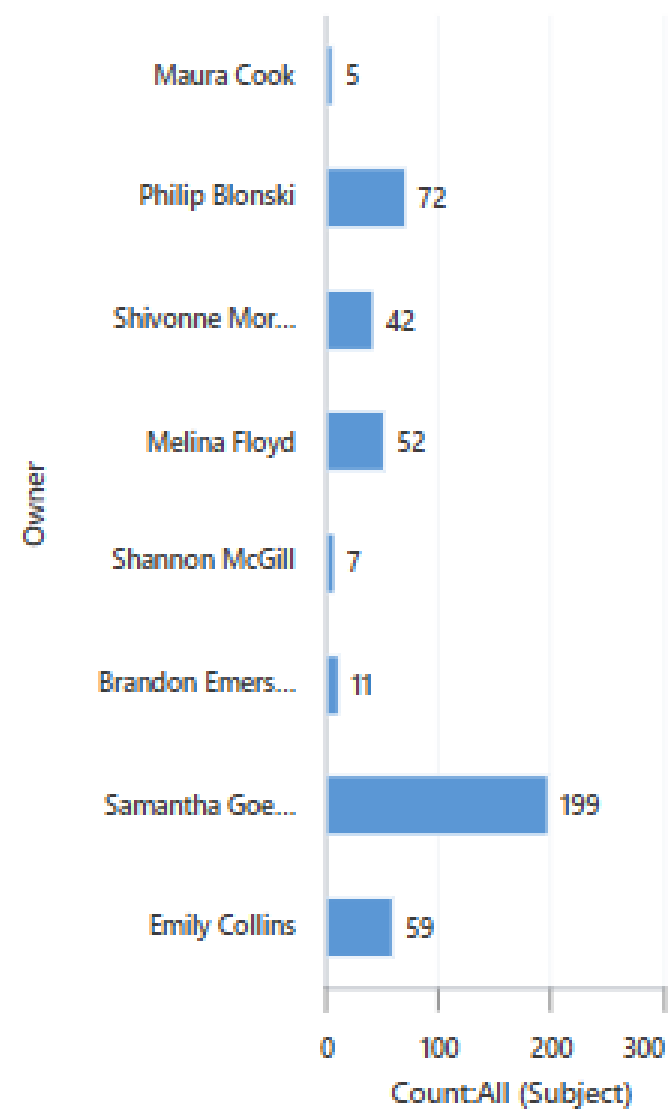


# TRACKING SUBSTANTIVE ACTIVITIES

Philanthropy and Development Substantive Acti... ▾

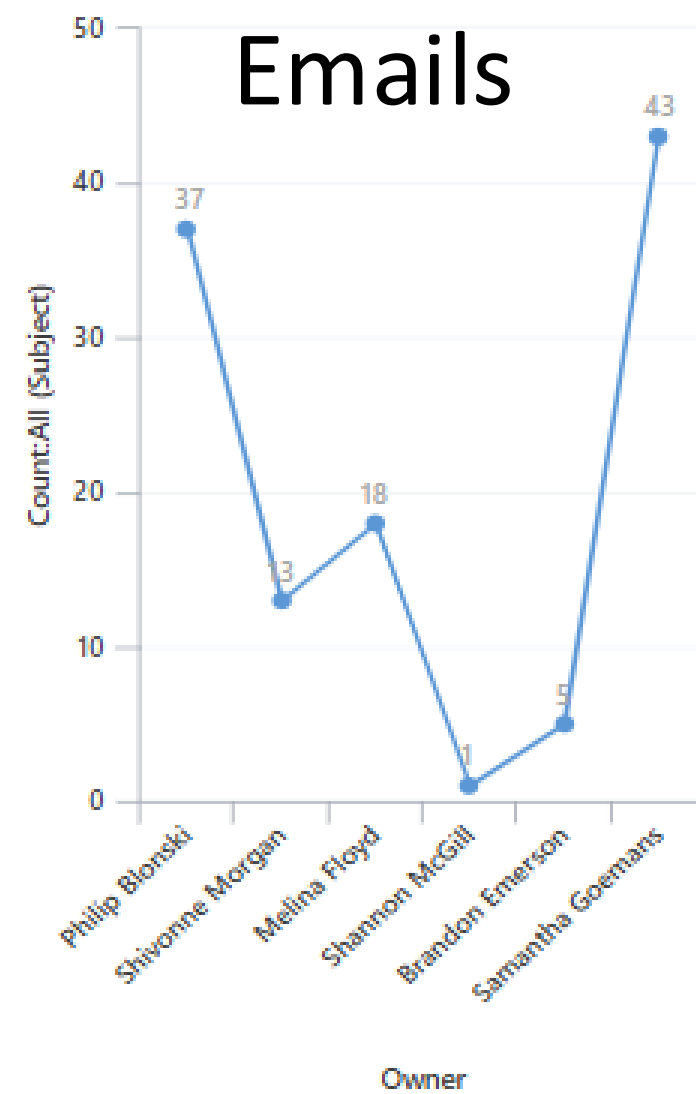
Brandon's Devel... Expand Chart

Activities by Owner



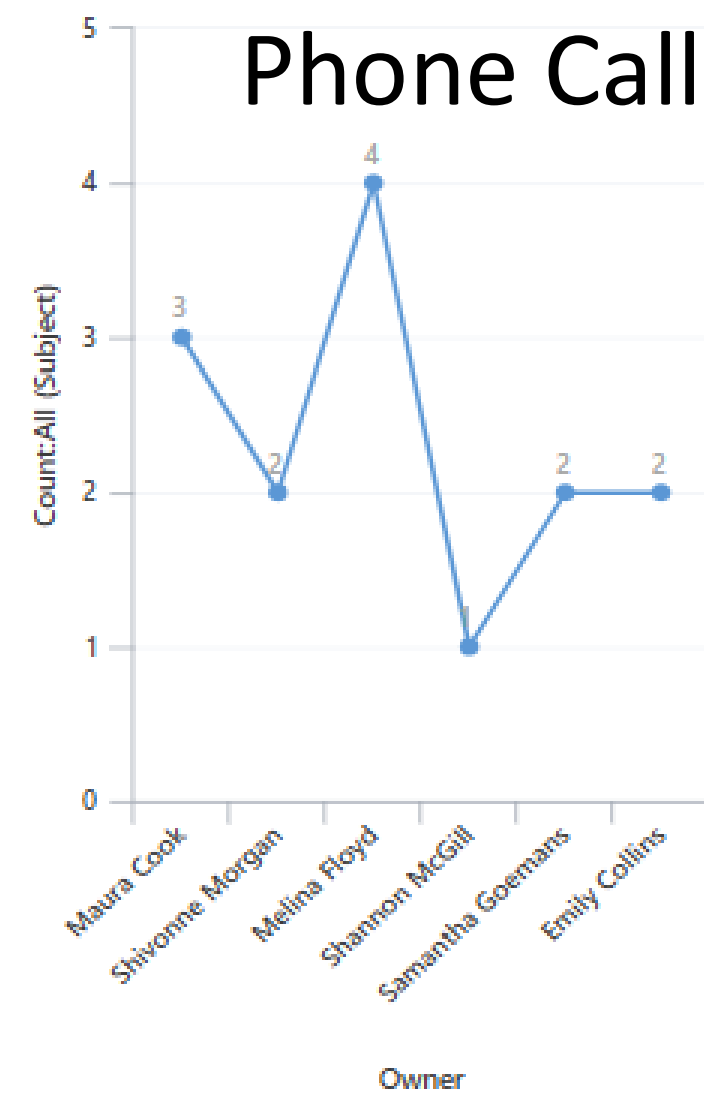
Brandon's Subst... Expand Chart

Emails by Owner



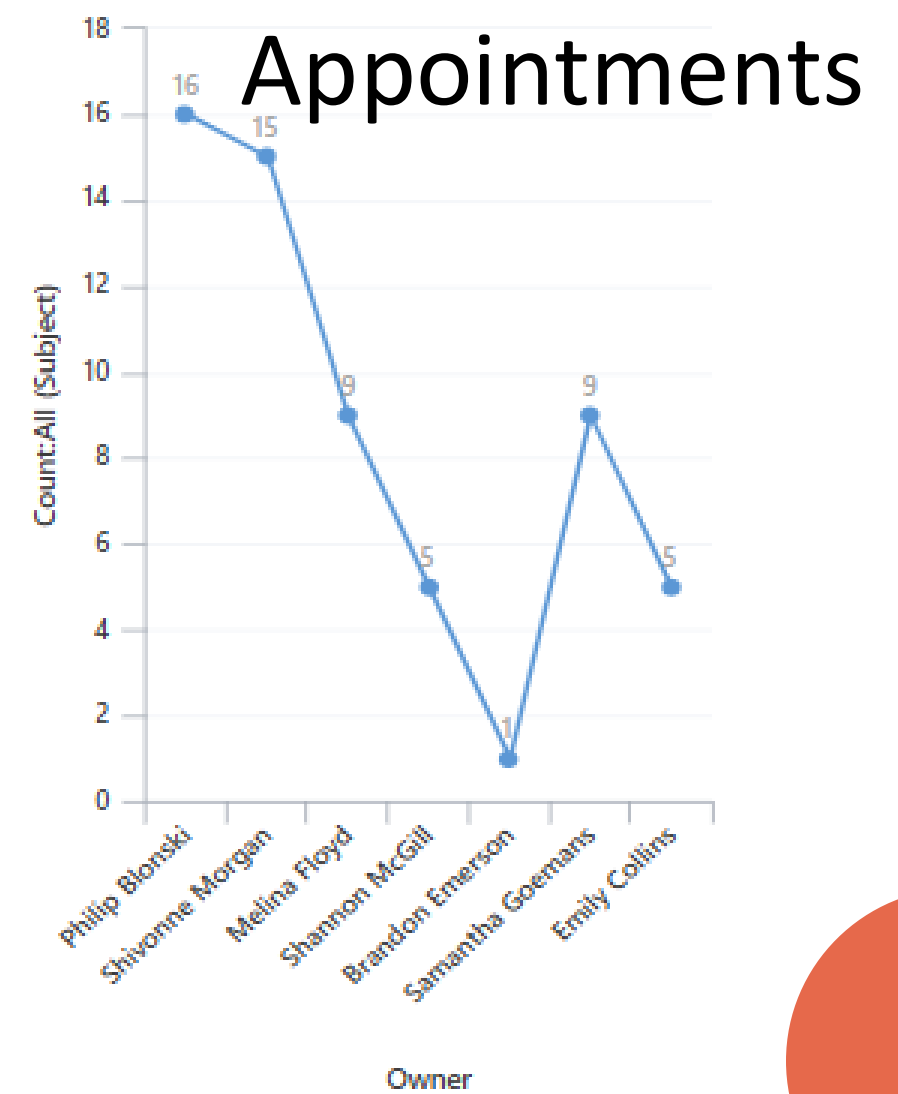
Brandon's Phon... Expand Chart

Phone Calls by Owner



Brandon's Subst... Expand Chart

Appointments by Owner



A solid orange circle graphic positioned to the left of the title text.

# MOVES MANAGEMENT WORKFLOW



# MAJOR GIFT SOLICITATION WORKFLOW

## 2024 Contact Major Gift Opportunity

Opportunity · Information ▾

Leon Olivier

Constituent

---

Goal Total Amount

---

Est. Close Date



Major Gifts  
Active for 52 minutes



Qualify (52 Min)

Engage

Propose

Negotiation

Renegotiate

Verbal Pledge

Close

General Workplace Giving Ad

Active for 52 minutes



Topic \* 2024 C

✓ Identify Contact



Opportunity Type \* Major

✓ Identify Household



Constituent \* Leon

Solicitation  
Timeframe

---

Territory ---

Estimated Capacity

---

Reporting Parent ---

Legacy Opportunity  
Number

---

Next Stage >

Campaign \* 2024 Hartford HA Campaign

Campaign Period \* 2024

Designation ---

Previous Opportunity ---

Type

Expected Payment  
Method Check

Gift Time Span Single Year

Probability (%) ---

Multi-Year Count ---



UNITED WAY

Central and Northeastern  
Connecticut

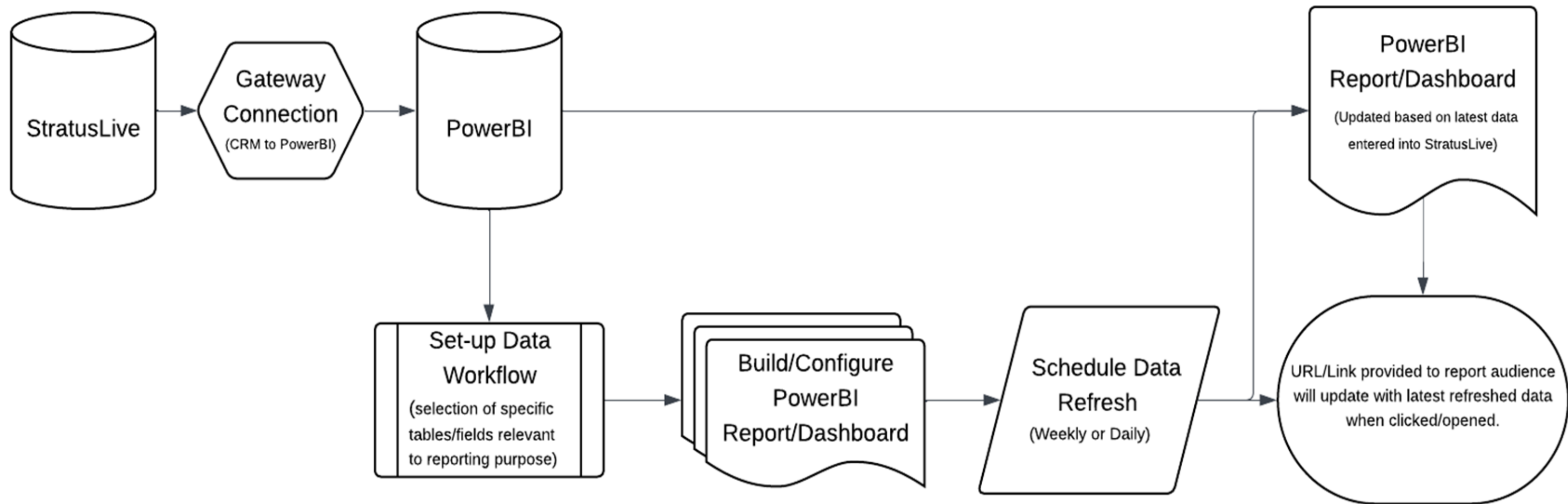


# KPI MOVES MANAGEMENT DASHBOARD





# POWER BI + STRAUSLIVE GATEWAY CONNECTION AND WORKFLOW





# POWER BI + STRAUSLIVE KPI DASHBOARD PROOF OF CONCEPT

**File Home Insert Modeling View Optimize Help**

Paste Cut Copy Format painter  
Clipboard

Get data Excel OneLake SQL Server Enter data Dataserve Recent sources  
Data

Transform data Refresh New visual Text box More visuals  
Queries Insert

New visual calculation New measure Quick measure  
Calculations

Sensitivity Publish Copilot  
Sensitivity Share Copilot

**2025 Campaign and Year Goals**

Campaign	\$ FY25 Goal
Workplace Campaign - Special Events	\$1,600,000
Workplace Campaign - Major Gifts	\$600,000
Workplace Campaign - Employee Giving	\$2,600,000
Workplace Campaign - Corporate Gifts	\$2,700,000
Other Revenue - Signature Events	\$1,750,000
Other Revenue - Grants	\$2,980,444
<b>Total</b>	<b>\$12,230,444</b>

**Workplace Campaign**

Campaign Period (Campaign) (Campaign)	2022		2023		2024		Total	
Opportunity Type	# Gifts	\$ Total	# Gifts	\$ Total	# Gifts	\$ Total	# Gifts	\$ Total
Corporate Workplace Giving	5492	\$4,202,314.36	5225	\$4,683,868.38	4212	\$3,384,013.91	14929	\$12,270,196.65
Fund Investment	1	\$300,000.00					1	\$300,000.00
Gift	1	\$0.00	15	\$31,235.06	15	\$32,018.02	31	\$63,253.08
Grant	1	\$85,000.00	7	\$45,000.00			8	\$130,000.00
Major Gift	904	\$692,825.15	745	\$589,871.42	438	\$489,664.40	2087	\$1,772,360.97
Pledge	8	\$211,990.00					8	\$211,990.00
Special Event - Team			68	\$6,037.25	5	\$7,422.50	73	\$13,459.75
Special Events	390	\$1,621,736.96	806	\$1,749,389.31	813	\$2,059,080.99	2009	\$5,430,207.26
Sponsorship	1	\$0.00					1	\$0.00
<b>Total</b>	<b>6798</b>	<b>\$7,113,866.47</b>	<b>6866</b>	<b>\$7,105,401.42</b>	<b>5483</b>	<b>\$5,972,199.82</b>	<b>19147</b>	<b>\$20,191,467.71</b>

**Other Revenue**

Campaign Period (Campaign) (Campaign)	2022		2023		2024		2025		Total	
Opportunity Type	# Gifts	\$ Total	# Gifts	\$ Total	# Gifts	\$ Total	# Gifts	\$ Total	# Gifts	\$ Total
Corporate Workplace Giving	40	\$43,750.50	2	\$3,500.00					42	\$47,250.50
Gift	12	\$25,590.00			1	\$500.00			13	\$26,090.00
Grant	16	\$439,981.47	25	\$465,774.82	11	\$736,190.80			52	\$1,641,947.09
Planned Gift	6	\$185,155.54							6	\$185,155.54
Product Order			5	\$6,075.00	30	\$55,450.00			35	\$61,525.00
Special Events	1313	\$364,621.02	1387	\$344,279.45	182	\$96,160.12			2882	\$805,060.59
Sponsorship	52	\$157,845.00	396	\$1,189,730.00	221	\$934,550.00	1	\$500.00	670	\$2,282,625.00
<b>Total</b>	<b>1439</b>	<b>\$1,216,943.53</b>	<b>1815</b>	<b>\$2,009,359.27</b>	<b>445</b>	<b>\$1,822,850.92</b>	<b>1</b>	<b>\$500.00</b>	<b>3700</b>	<b>\$5,049,653.72</b>

**Filters**

Search

Filters on this page

Add data fields here

Filters on all pages

Add data fields here

**Visualizations**

Build visual

Values

Add data fields here

Drill through

Cross-report ☐

Keep all filters ☒

Add drill-through fields here

**Data**

Search

- Date Range FY 22-28
- FY 2022-2028
- FY 2023
- FY 2024
- FY 2025
- FY 2026
- FY 2027
- FY 2028
- FY Goals By Campaign
- Recognitions Export
- Transaction Export

**Apply**

**SUMMARY**

TOTAL WP Campaign (Accounts and Contac...)

TOTAL WP Campaign INTERNAL and EXTER...

TOTAL WP Campaign +

# POWER BI + STRAUSLIVE PUBLISHED KPI DASHBOARD REPORT

Home

Create

Browse

OneLake catalog

Workspaces

United Way of Central ...

UWCNCT Campaign...

UWCNCT Campaign Goal and Activity Dashboard Report

Data updated 4/21/25

Search

Pages

SUMMARY

TOTAL WP Campaign (Accounts and Contacts)

TOTAL WP Campaign INTERNAL and EXTERNAL ...

TOTAL WP Campaign INTERNAL

TOTAL WP Campaign EXTERNAL

TOTAL Other Revenue (Accounts & Contacts)

TOTAL Signature Events (Accounts & Contacts)

TOTAL Corporate Special Events (Accounts)

TOTAL Corporate Matches & Gifts (Accounts)

TOTAL Grants (Accounts & Contacts)

TOTAL Kit Projects (Accounts & Contacts)

TOTAL Workplace Campaign by Employer/Account

TOTAL Workplace Campaign by Employee/Contact

2025 Campaign and Year Goals

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# POWER BI + STRAUSLIVE PUBLISHED KPI DASHBOARD REPORT

NEW UWCNCT Campaign Goal and Activity Dashboard Report

Data updated 4/21/25

Search



## Pages



SUMMARY

TOTAL WP Campaign (...)

TOTAL WP Campaign ...

TOTAL WP Campaign I...

TOTAL WP Campaign E...

TOTAL Other Revenue ...

TOTAL Signature Event...

TOTAL Corporate Speci...

TOTAL Grants (Account...

TOTAL Kit Projects (Acc...

TOTAL Corporate Matc...

TOTAL Workplace Cam...

TOTAL Workplace Cam...



File



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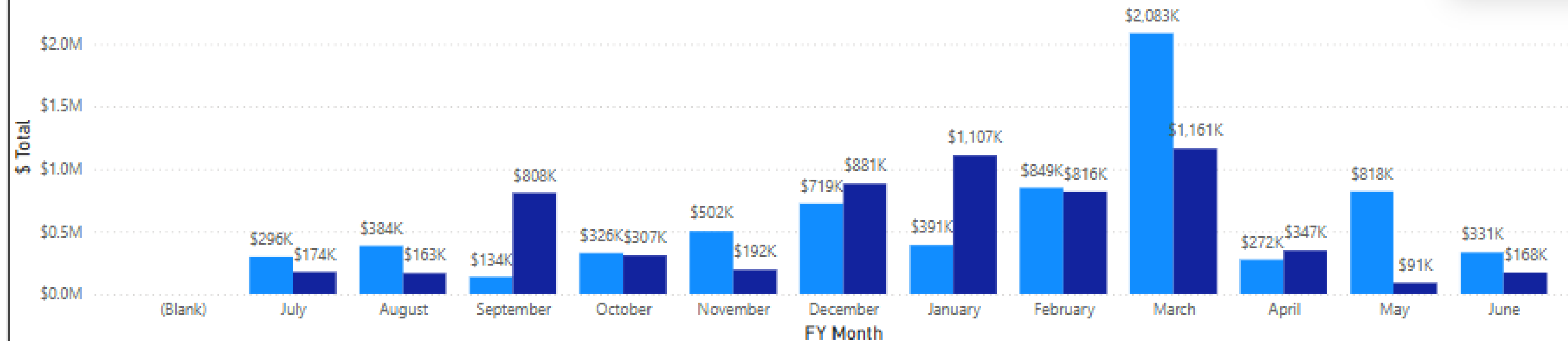


Copilot



### Workplace Campaign EXTERNAL

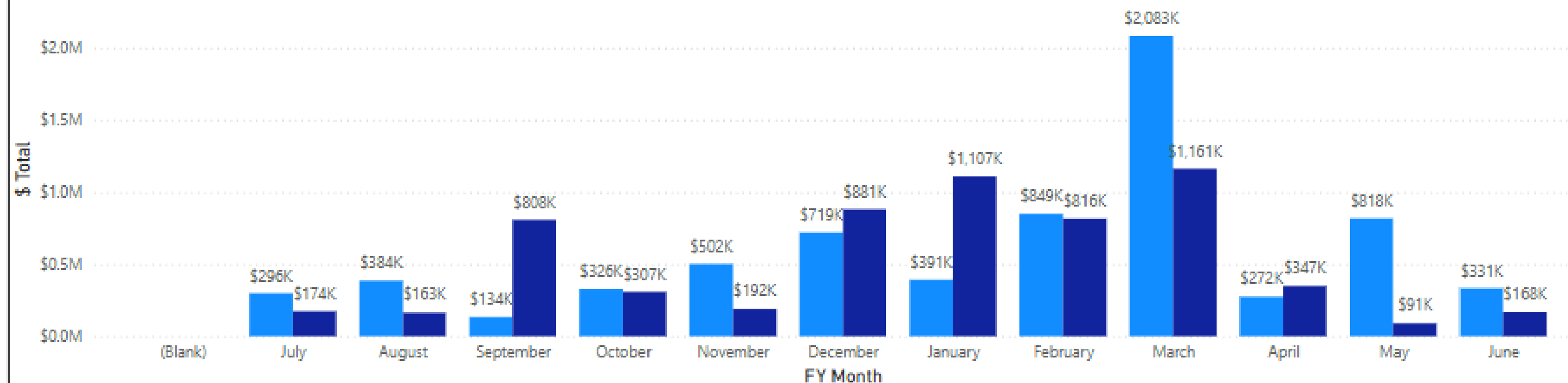
Campaign Period ● 2023 ● 2024



Show/hide filter

### Workplace Campaign INTERNAL

Campaign Period ● 2023 ● 2024





# QUESTIONS



**Robert Williamson**  
Director of Fundraising Operations  
and Digital Services

[rwilliamson@unitedwayinc.org](mailto:rwilliamson@unitedwayinc.org)