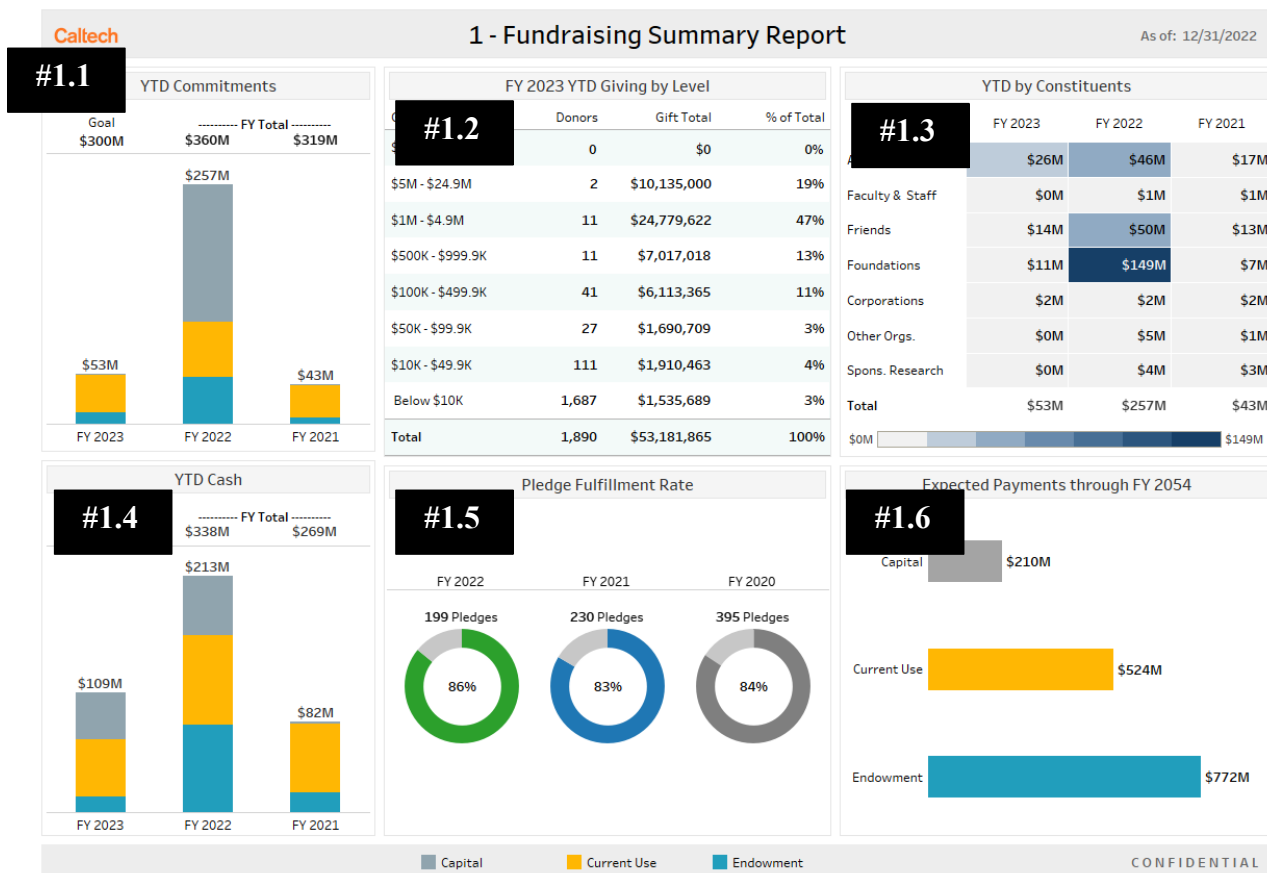# New Executive Summary Dashboards
Key to Data and Dates

Page 1: Fundraising Summary Report

Date parameters: Fiscal year (10/1 start) through the end of the month noted in the upper right-hand corner of the page

Data elements:

#1.1 – YTD Commitments – This block contains comparative year to date (YTD) commitments for the current fiscal year and the previous two fiscal years. Columns show giving by type (capital, current use, endowment). The goal for current fiscal year commitments is shown above the column of YTD commitments. Fiscal year totals for the prior two fiscal years is also shown above the columns for commitments.

#1.2 – FY 20XX YTD Giving by Level – This block shows YTD commitments for the current fiscal year based on giving levels. For each giving level, the number of donors,

gift total for that level, and the % of total based on all funds raised is shown. The donor column is based on donor of intent and excludes soft credits.

#1.3 – YTD by Constituents – This block shows giving by key constituent groups: alumni, faculty & staff, friends, foundations, corporations; other organizations, and sponsored research. Comparative data is for the current fiscal year and the previous two fiscal years data and is for giving through the month shown on the top right-hand corner of the dashboard. The amounts are shaded from grey to blue, based on the heat map key located on the bottom of the block.
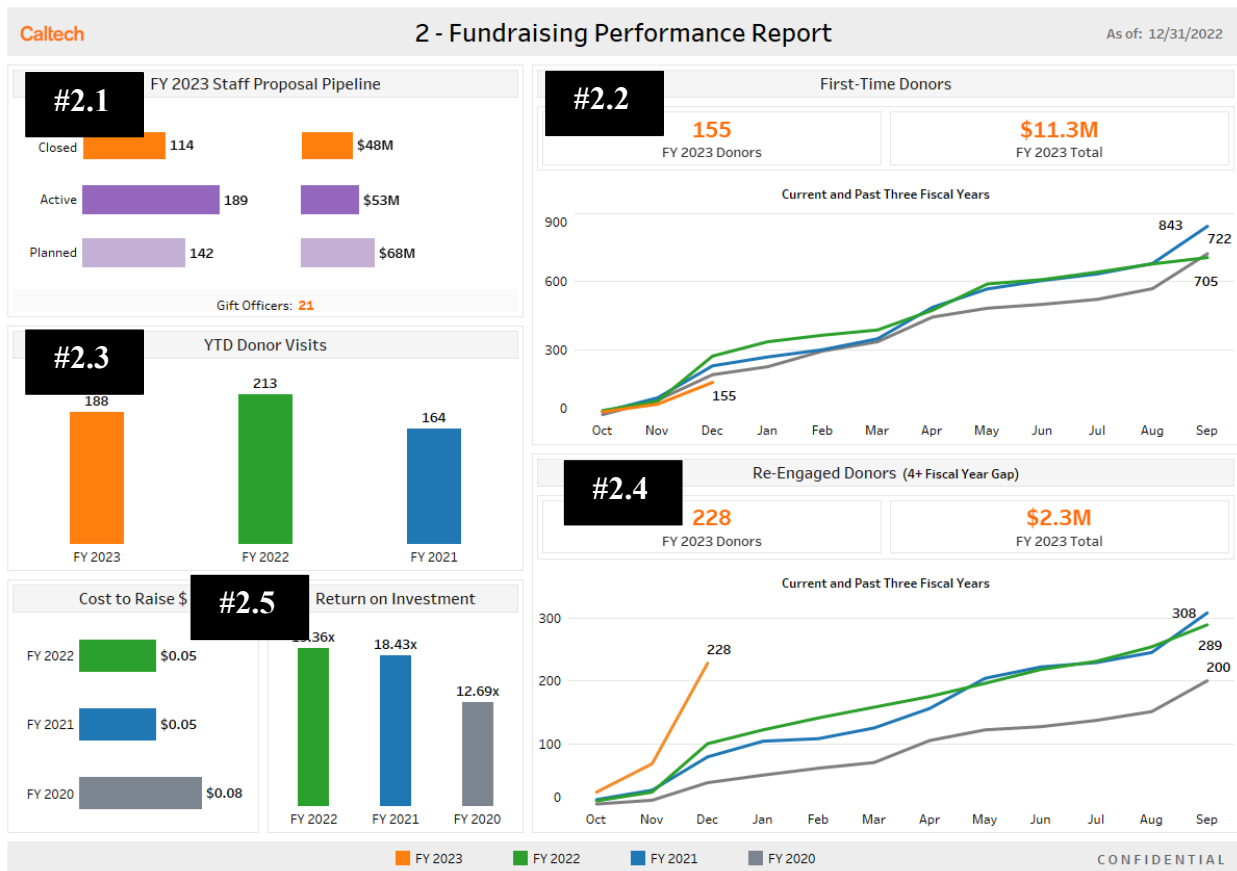
#1.4 – YTD Cash – This block contains comparative YTD cash for the current fiscal year and the previous two fiscal years. Columns show giving by type (capital, current use, endowment). The fiscal year totals for the prior two fiscal years is shown above the columns for cash.

#1.5 – Pledge Fulfilment Rate – This block shows the percentage of pledges that are fulfilled for the previous three fiscal years. Data contained in this block is updated annually, in October.

#1.6 – Expected Payments through FY20XX – This block shows the value of expected gifts by type (capital, current use, endowment).

Page 2: Fundraising Performance Report

Date parameters: Fiscal year (10/1 start) through the end of the month noted in the upper right-hand corner of the page

#2.1 — FY 2023 Staff Proposal Pipeline

Closed	114		$48M
Active	189		$53M
Planned	142		$68M

Gift Officers: **21**

#2.2 — First-Time Donors

155	**$11.3M**
FY 2023 Donors	FY 2023 Total

Current and Past Three Fiscal Years — 843, 722, 705, 155

#2.3 — YTD Donor Visits

FY 2023: 188, FY 2022: 213, FY 2021: 164

#2.4 — Re-Engaged Donors (4+ Fiscal Year Gap)

228	**$2.3M**
FY 2023 Donors	FY 2023 Total

Current and Past Three Fiscal Years — 308, 289, 228, 200

#2.5 — Cost to Raise $ / Return on Investment

Cost to Raise $: FY 2022 $0.05, FY 2021 $0.05, FY 2020 $0.08

Return on Investment: FY 2022 19.36x, FY 2021 18.43x, FY 2020 12.69x

Legend: ■ FY 2023 ■ FY 2022 ■ FY 2021 ■ FY 2020   CONFIDENTIAL

Data elements:

#2.1 – FY20XX Staff Proposal Pipeline – This block shows the proposals in the pipeline for the current fiscal year. The top bar, closed, shows the number of proposals closed, and the total raised from these proposals. The middle bar, active, shows the number of outstanding proposals solicited (but not yet closed) and the dollar value of those solicited proposals. The bottom bar, planned, shows the number planned proposals (not yet solicited) for the remainder of this fiscal year, and the dollar value of those planned proposals. The current number of gift officers is listed at the bottom of this block.

#2.2 – First-Time Donors – This block shows the number of donors who have made their first gift to Caltech this fiscal year and the value of those gifts. The chart illustrates the YTD first-time donors compared to the previous three fiscal years.

#2.3 – YTD Donor Visits – This block contains comparative YTD donor visits for the current fiscal year and the previous two fiscal years.
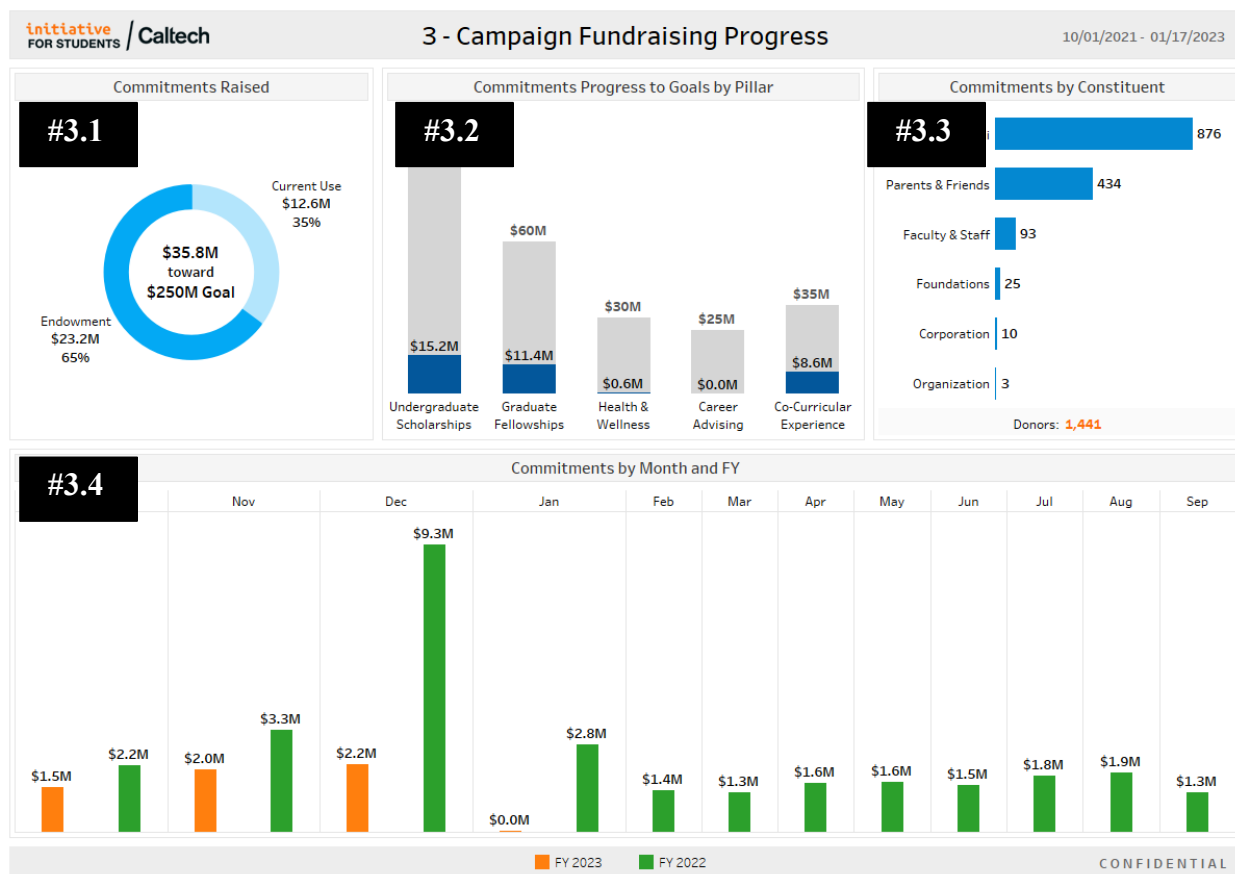
#2.4 – Re-Engaged Donors – This block shows the number of re-engaged donors (a donor who last gift to Caltech was 4 or more fiscal years ago) who have made a gift to

Caltech this fiscal year and the value of those gifts. The chart illustrates the YTD re-engaged donors compared to the previous three fiscal years.

#2.5 – Cost to Raise $ *and* Return on Investment – This block shows the cost to raise a dollar and the return on investment for the previous three fiscal years. Data contained in this block is updated annually, in October.

Page 3: Campaign Fundraising Progress

Date parameters: Campaign start (10/1/2021) through the date noted in the upper right-hand corner of the page

Data elements:

#3.1 – Commitments Raised – This block shows the total funds raised for the Initiative for Caltech Students campaign against the $250M goal. The chart illustrates the percentage and value of those gifts by type (current use, endowment, capital).
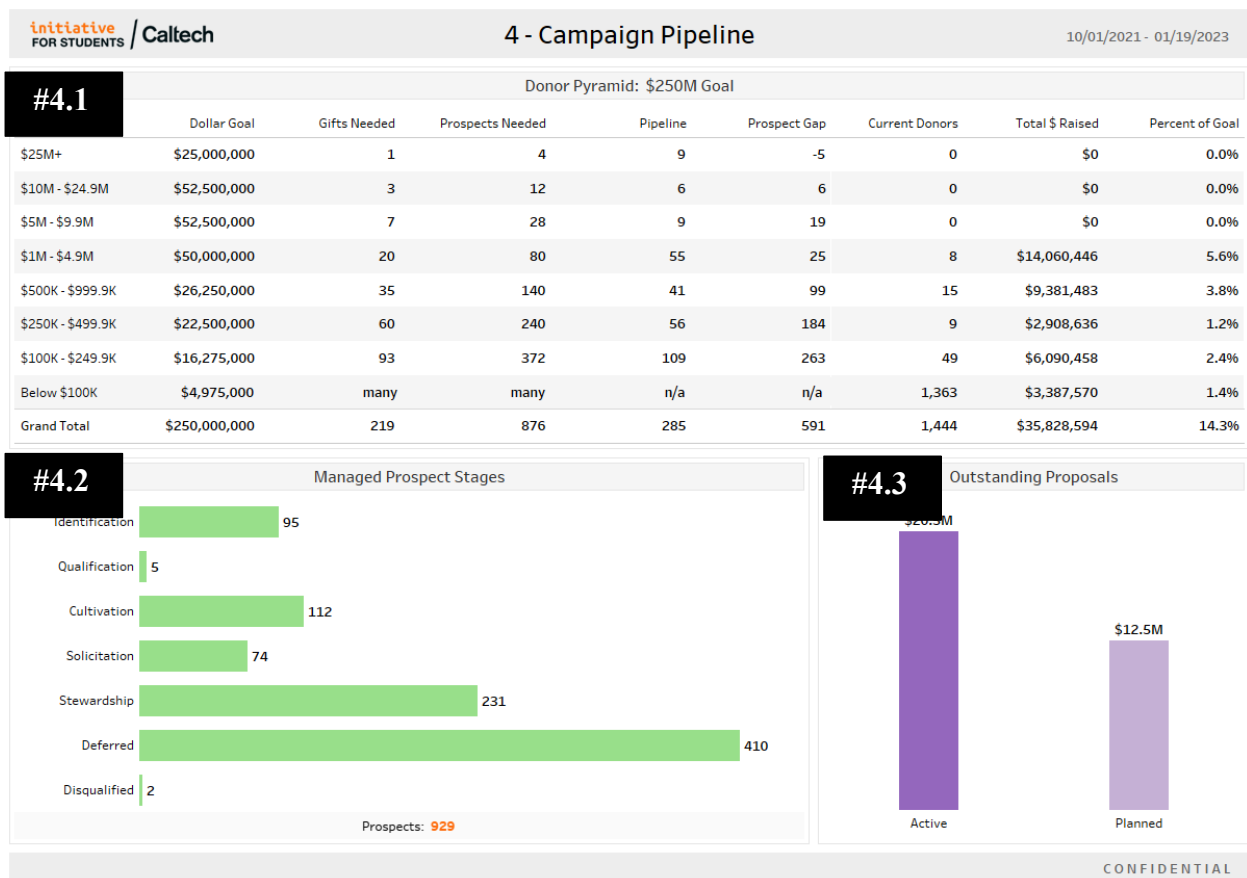
#3.2 – Commitments Progress to Goals by Pillar – This block shows the total funds raised for the campaign against the goals for each of the five pillars. Goals for each pillar is listed above the grey bar for that priority.

#3.3 – Commitments by Constituent – This block shows campaign giving by key constituent groups: alumni, parents & friends, faculty & staff, foundations, corporations; and organizations. The total number of campaign donors is listed at the bottom of this block.

#3.4 – Commitments by Month and FY – This chart shows campaign giving broken out by fiscal year and by month.

Page 4: Campaign Pipeline

Date parameters: Campaign start (10/1/2021) through the date noted in the upper right-hand corner of the page

initiative FOR STUDENTS / Caltech   4 - Campaign Pipeline   10/01/2021 - 01/19/2023

#4.1

Donor Pyramid: $250M Goal

	Dollar Goal	Gifts Needed	Prospects Needed	Pipeline	Prospect Gap	Current Donors	Total $ Raised	Percent of Goal
$25M+	$25,000,000	1	4	9	-5	0	$0	0.0%
$10M - $24.9M	$52,500,000	3	12	6	6	0	$0	0.0%
$5M - $9.9M	$52,500,000	7	28	9	19	0	$0	0.0%
$1M - $4.9M	$50,000,000	20	80	55	25	8	$14,060,446	5.6%
$500K - $999.9K	$26,250,000	35	140	41	99	15	$9,381,483	3.8%
$250K - $499.9K	$22,500,000	60	240	56	184	9	$2,908,636	1.2%
$100K - $249.9K	$16,275,000	93	372	109	263	49	$6,090,458	2.4%
Below $100K	$4,975,000	many	many	n/a	n/a	1,363	$3,387,570	1.4%
Grand Total	$250,000,000	219	876	285	591	1,444	$35,828,594	14.3%

#4.2 Managed Prospect Stages

Stage	Count
Identification	95
Qualification	5
Cultivation	112
Solicitation	74
Stewardship	231
Deferred	410
Disqualified	2

Prospects: **929**

#4.3 Outstanding Proposals

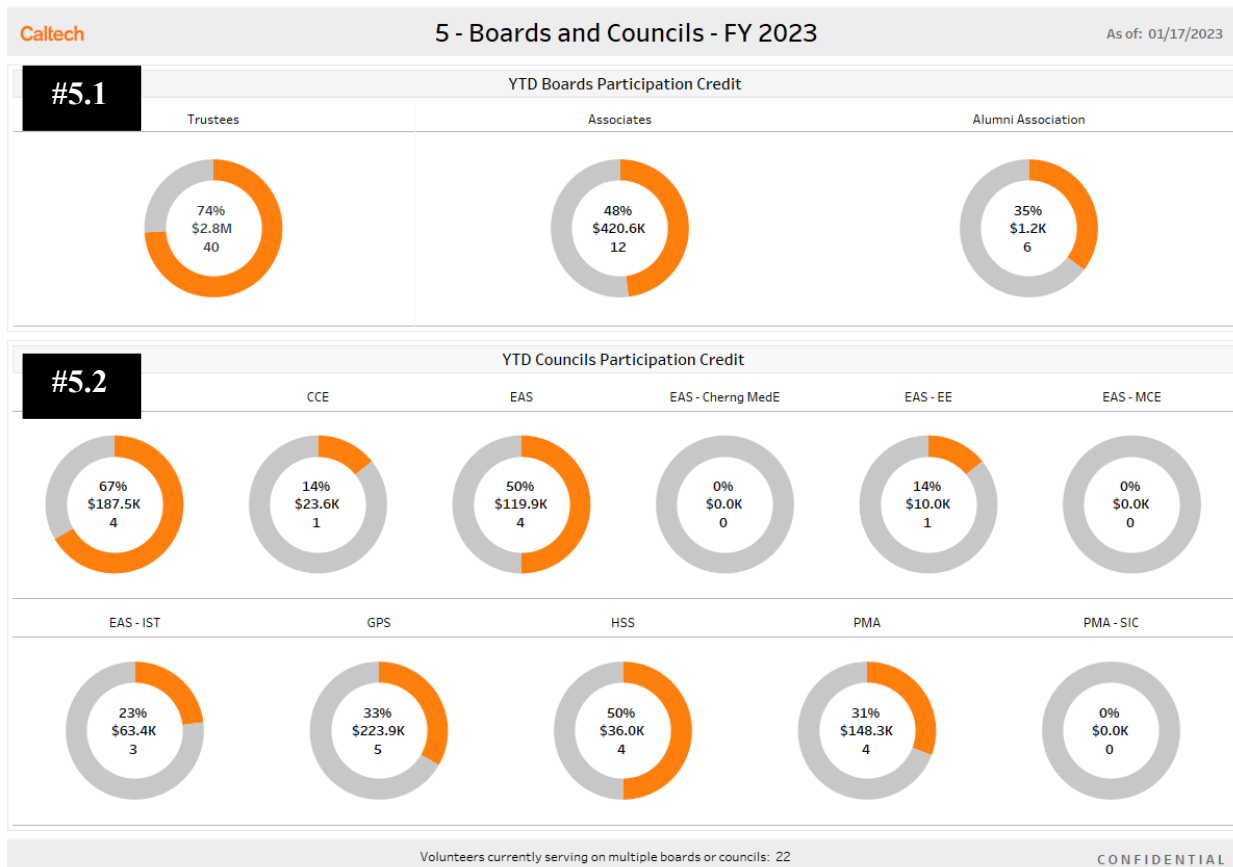| Active	Planned
$20.5M	$12.5M

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Data elements:

#4.1 – Donor Pyramid: $250M Goal – This block shows the donor pyramid for the $250M campaign. Columns 1, 2 and 3 show the number of gifts needed by giving level. Columns 4, 5 and 6 show the number of prospects needed for each gift (assuming a factor of four), the number of prospects currently in the pipeline, and the prospect gap. Columns 7, 8 and 9 show the number of current dollars, total amount raised, and percent of goal.

#4.2 – Managed Prospect Stages – This block shows the number of prospects by prospect stages. The total number of prospects is listed at the bottom of this block.

#4.3 – Outstanding Proposals – This block shows the proposals in the pipeline for the campaign. The left bar, active, shows the value of outstanding proposals solicited (but not yet closed). The right bar, planned, shows the value of planned proposals (not yet solicited) for the remainder of this campaign.

Page 5: Boards and Councils – FY 20XX

Date parameters: Fiscal year (10/1 start) through the date noted in the upper right-hand corner of the page
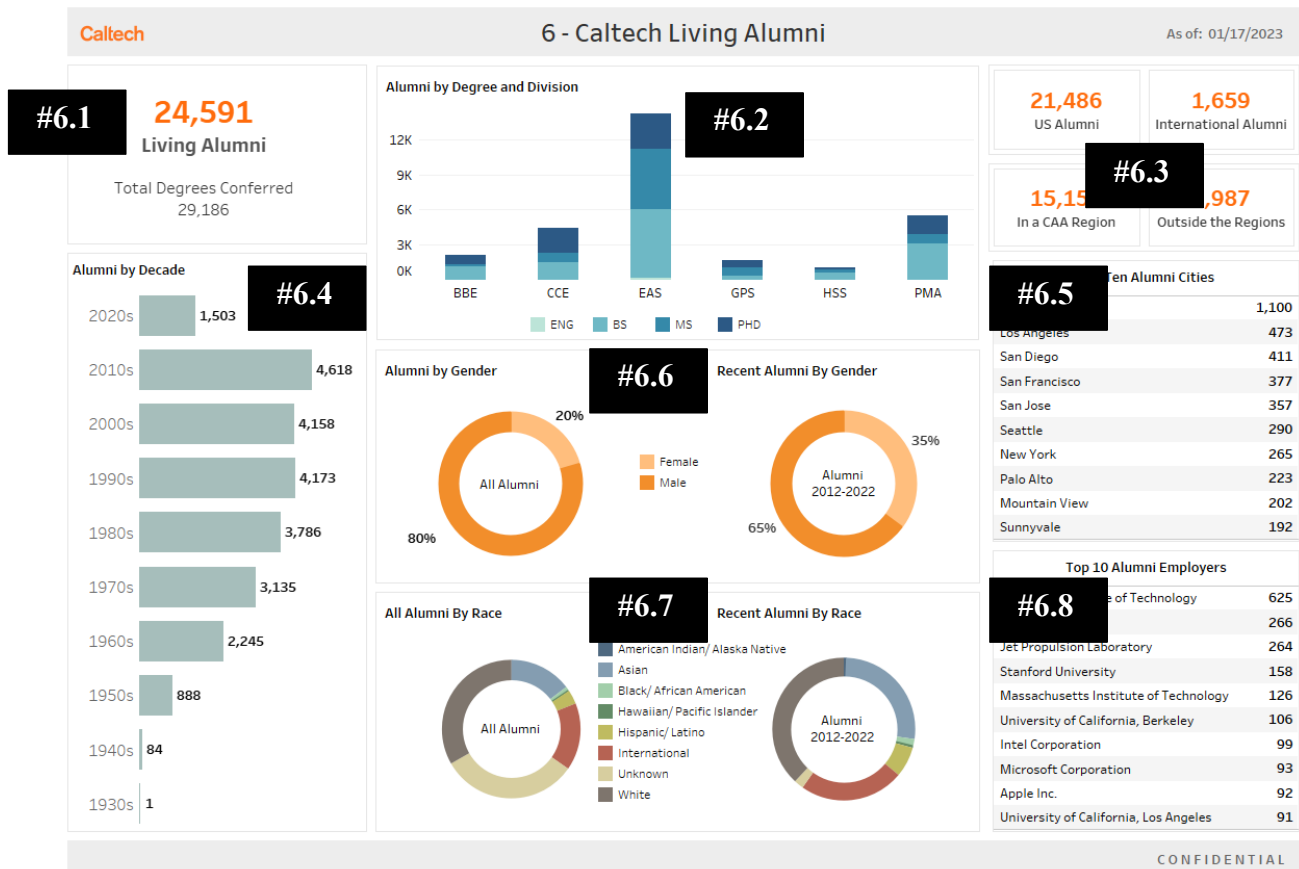
Data elements:

#5.1 – YTD Boards Participation Credit – This block shows current fiscal year giving for volunteers serving on a Caltech board. In the center of each donut chart is the percent of volunteers who have made a gift YTD, the collective value of those gifts, and the number of volunteer donors.

#5.2 – YTD Councils Participation Credit – This block shows current fiscal year giving for volunteers serving on a Caltech Chair's Council or Advisory Council. In the center of each donut chart is the percent of volunteers who have made a gift YTD, the collective value of those gifts, and the number of volunteer donors.

Note: The number of volunteers currently serving on multiple board or councils is listed on the bottom of this page.

<u>Page 6: Caltech Living Alumni</u>

Date parameters: Snapshot in time; date noted in the upper right-hand corner of the page

Data elements:

#6.1 – Living Alumni – This block shows the total number of living alumni and total degrees conferred.

#6.2 – Alumni by Degree and Division – This block charts the total alumni degrees by division.

#6.3 – Alumni Stats – This block contains statistics on where alumni live.

#6.4 – Alumni by Decade – This block charts total alumni by decade.

#6.5 – Top 10 Alumni Cities – This block lists the ten cities where the most alumni live.

#6.6 – Alumni by Gender – This block shows total alumni by gender. The chart on the right shows recent alumni (2012-2022 graduate years).

#6.7 – Alumni by Race This block shows total alumni by race. The chart on the right shows recent alumni (2012-2022 graduate years).

#6.8 – Top 10 Alumni Employers – This block lists the ten employers where the most alumni work.