

Strategic Insights

Harnessing Data to Navigate
Your School's Success



We prefer the discipline of knowledge to the anarchy of ignorance.

We pursue knowledge the way a pig pursues truffles.

-David Ogilvy

Independent schools hold a unique position, balancing tradition with innovation. Schools need to derive insights from data to retain their competitive edge, ensure student success, and sustain financial health.

Independent schools often face:

Diverse Stakeholder Expectations

From parents to alumni, the expectations vary.

Financial Sustainability

Balancing tuition, donations, and operational costs.

Enrollment and Retention

Ensuring optimal student numbers while maintaining standards.



In this complex environment, **data is paramount**. Schools need a 360-degree view of their operations, encompassing enrollment and retention, financial health, and stakeholder engagement.

Schools are data rich!

Data Sources

Finance /
Operations

Fundraising /
Advancement

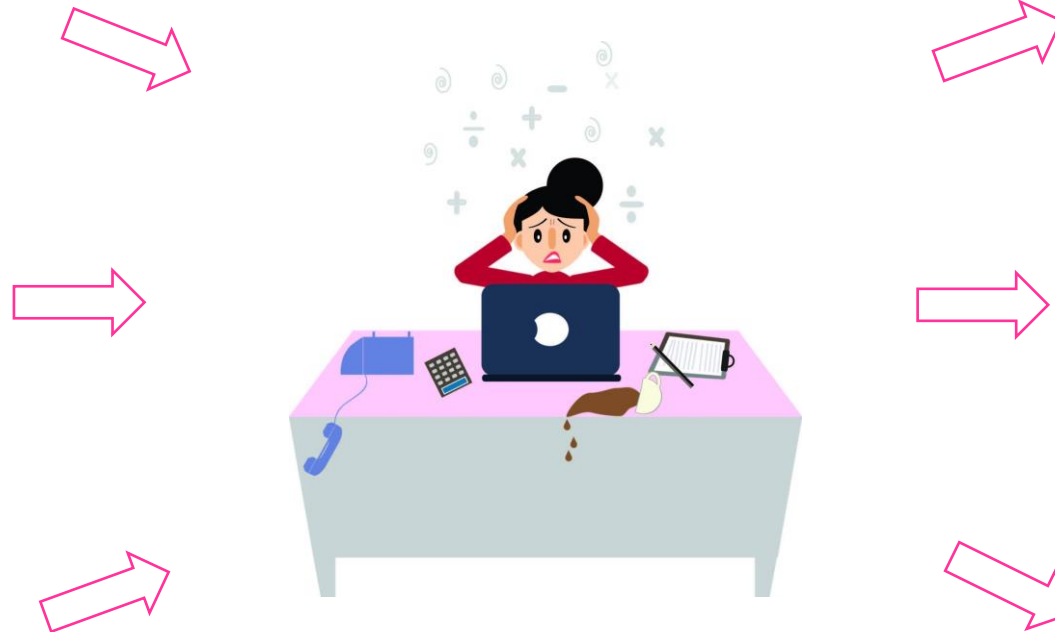
Admissions /
Enrollment

Reporting Requirements

Board

Organizations

Internal



Large data sets = millions of data points

Things go wrong when...

...board reports are confusing, and you haven't pre-set your metric guardrails.



Eliminate confusion by using clear, consistent reports for each Board meeting!

Keep the report format and data the same throughout the year.

Stay focused on the agreed upon KPIs

Set your metric guardrails at the beginning of the year with the Board.

Goal setting success: no silos!



Goal setting using KPIs



Report Date: 20-Sep-13
Fiscal Year: April 1, 2013 thru March 31, 2014
NOTE: All data here is fictitious - for example only

Summary:

Annual Fund Goal	\$750,000
Amount Reported To Date	\$448,200
Amount Reported to Budget	\$450,000
Percentage Reported	60%

Next Steps:

Goal Not Fully in Place	24
Waiting To Be Started	0
Goal Not Fully Started	2
Implementation In Progress	2
Goal Not Fully Started	0
Implementation In Progress	0
Annual Report Cycle C&A	By October 15
Annual Auction	January 18th

Gifts by Source

Revenue Source	Goal	Reported To Date	Balance To Report	% Reported
Board	\$10,000	\$10,000	\$0	100%
Major Donors	\$400,000	\$400,000	\$0	100%
Members Under \$500	\$10,000	\$10,000	\$0	100%
Special Events	\$200,000	\$18,000	\$182,000	9%
Donations	\$100,000	\$10,000	\$90,000	10%
Public Events	\$10,000	\$10,000	\$0	100%
GRAND TOTAL:	\$750,000	\$448,200	\$301,800	60%

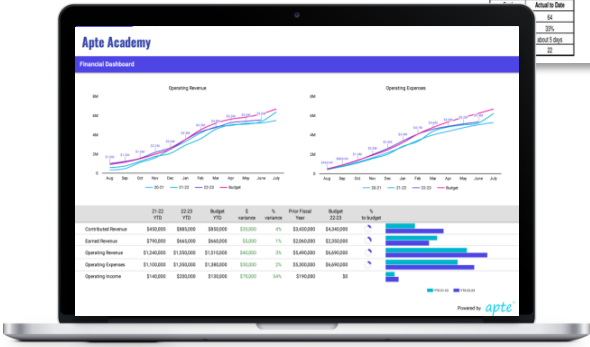
Gifts by Giving Level

	# of Gifts	Gift Amount	Total Gifts Per Category	# of Prospects	# of Gifts To Date	Amount Reported at This Level	Balance to Be Reported at This Level	% Reported at This Level
Major Gifts 80% of Goal	0	\$100,000	\$100,000	0	0	\$0	\$100,000	0%
	0	\$50,000	\$50,000	0	0	\$0	\$50,000	0%
	1	\$20,000	\$20,000	0	2	\$20,000	\$0	100%
	1	\$10,000	\$10,000	0	2	\$10,000	\$0	100%
Community Gifts 20% of goal	0	\$5,000	\$5,000	0	0	\$0	\$5,000	0%
	0	\$2,000	\$2,000	0	0	\$0	\$2,000	0%
	0	\$1,000	\$1,000	0	0	\$0	\$1,000	0%
	0	\$500	\$500	0	0	\$0	\$500	0%
TOTAL:	100%	\$750,000	1,307	70	\$448,200	\$301,800	60%	

Additional Goals - A place to measure whatever else is important to your organization

Actual to Date
64
78%
20
25

Last Updated: 8/23/13



1

Start with strategy / strategic plan

2

Set 1 – 5 goals per functional area per year

3

Set a KPI (metric) you will track per goal

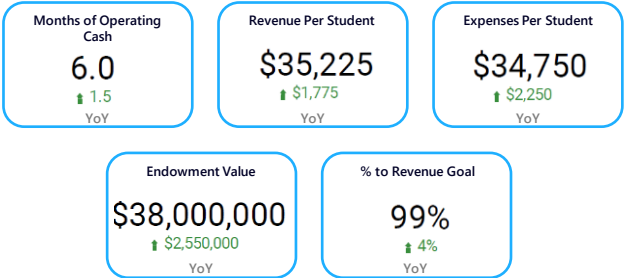
4

Track that metric monthly

How to turn data into strategy: KISS!

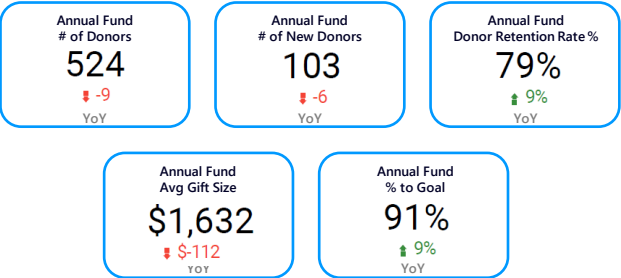
Finance / Operations

Free Cash Flow



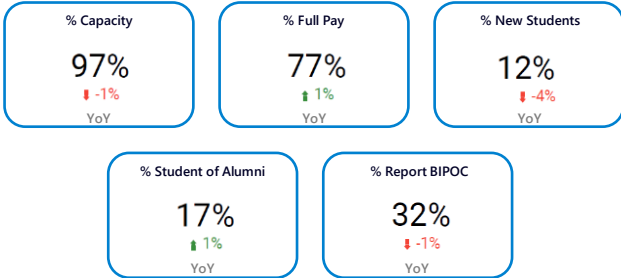
Fundraising / Advancement

% of Annual Fund Goal Raised YTD vs. Prior YTD



Admissions / Enrollment

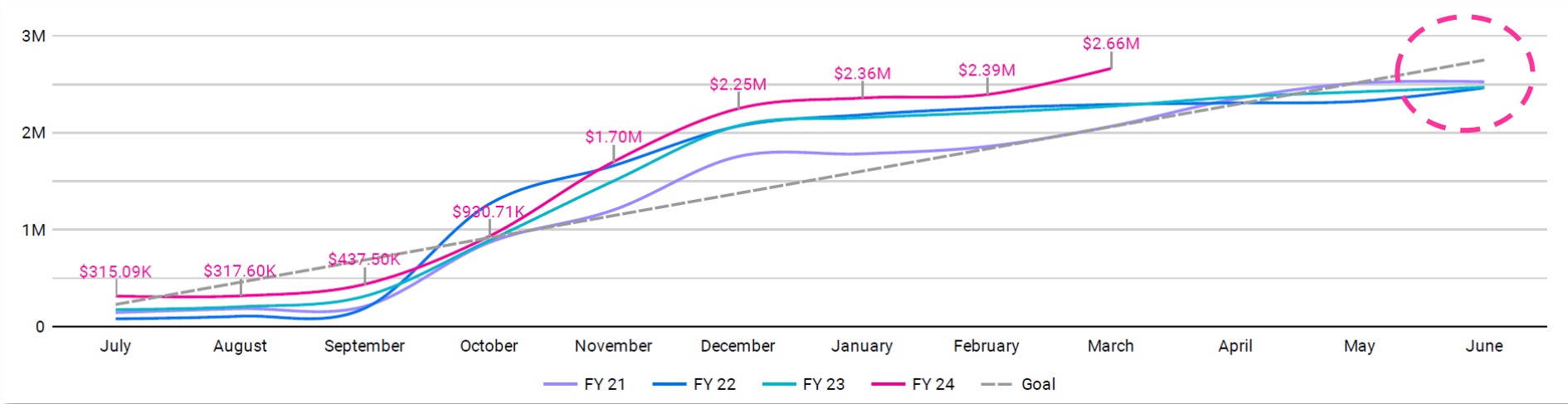
Capacity Planning



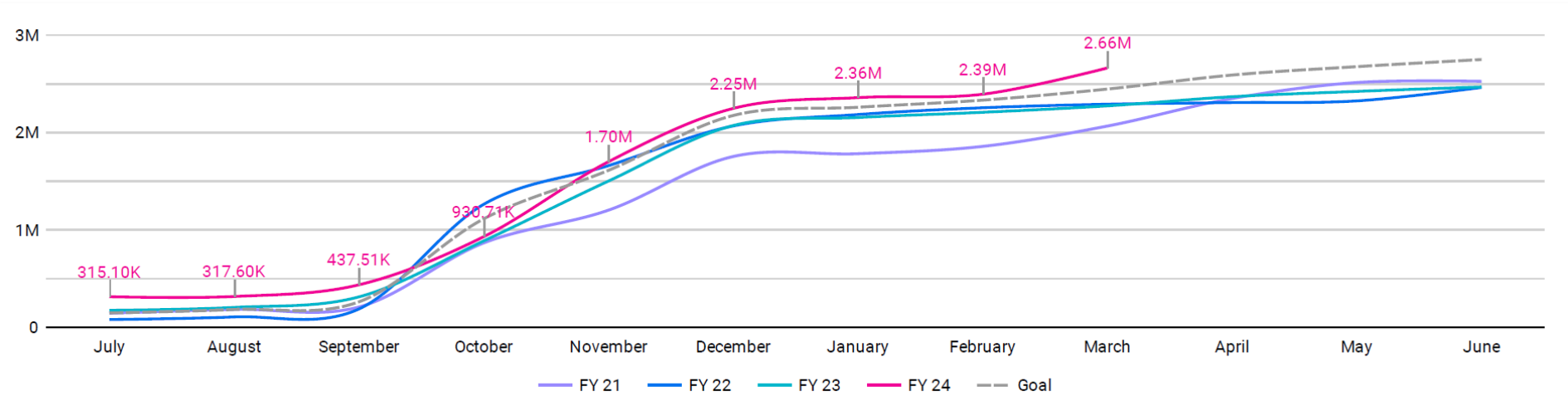
Strategic Plan & Sustainability

Monthly targets

1



2



"A picture is worth a thousand words"

Finance

FREE CASH FLOW = SUSTAINABILITY

Free cash flow (FCF) is the money a company has left over after paying its operating expenses (OpEx) and capital expenditures (CapEx).

Operating Revenues – Operating Expenditures – Capital Expenditures = Free Cash Flow

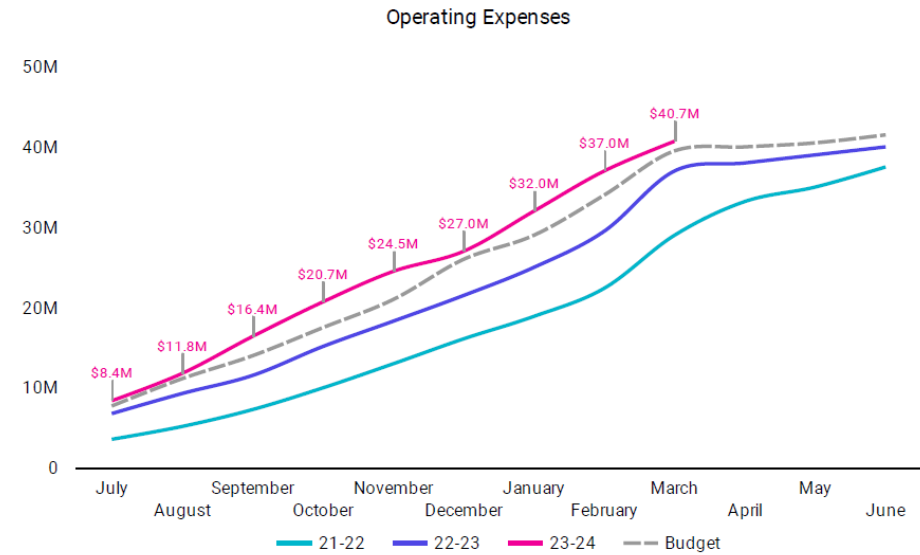
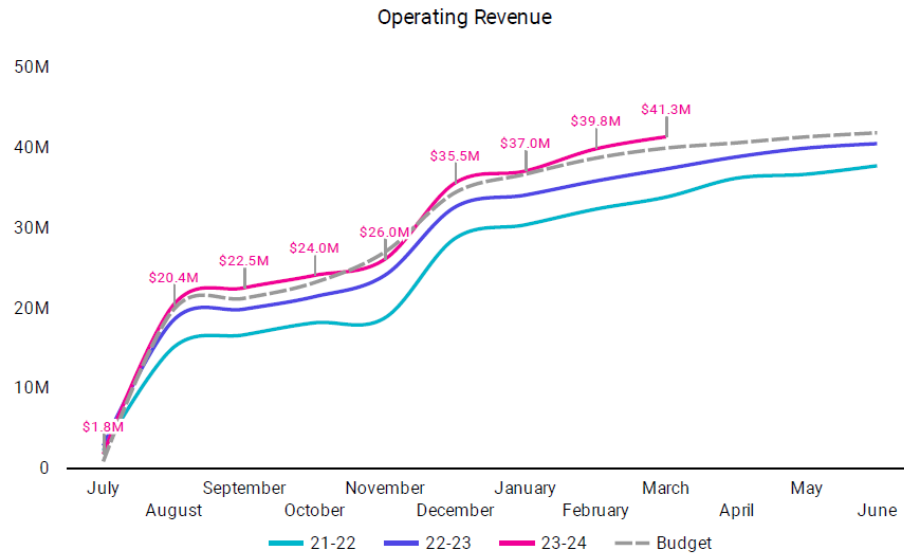
Remove all nonoperating revenues and expenses like:

- Depreciation & amortization
- Investment income
- Other non-operating, non-cash revenues or expenses

The more free cash flow an organization has, the more it can allocate to growth opportunities.

How Useful Is Your Income Statement?

Financial Dashboard

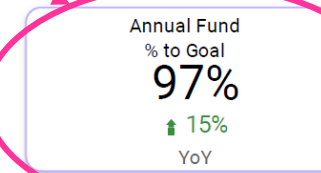
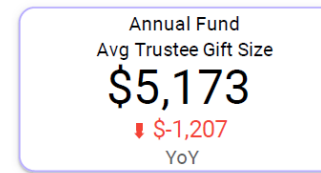
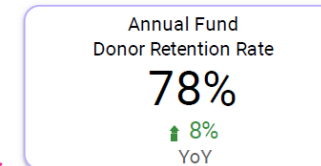
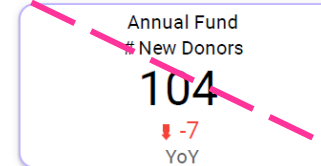
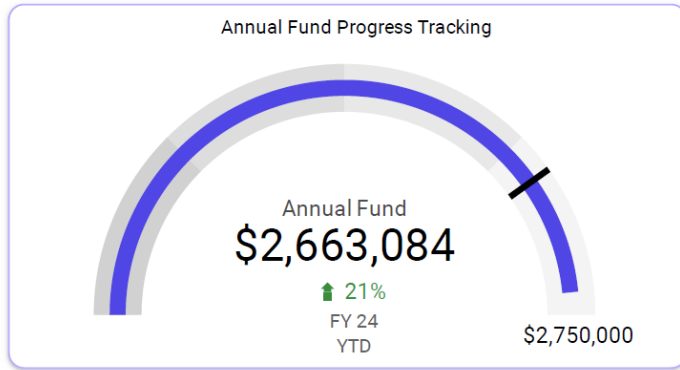


	22-23 YTD	23-24 YTD	Budget YTD	\$ variance	% variance	Prior Fiscal Year	Budget 23-24	% to budget	
Tuition Revenue	\$28,500,000	\$31,500,000	\$30,000,000	\$1,500,000	5%	\$29,500,000	\$30,000,000	100%	
Contributions	\$5,000,000	\$6,000,000	\$6,250,000	-\$250,000	-4%	\$6,500,000	\$7,000,000	100%	
Operating Revenue	\$37,250,000	\$41,250,000	\$39,850,000	\$1,400,000	4%	\$40,400,000	\$41,750,000	100%	
Operating Expenses	\$37,000,000	\$40,700,000	\$39,500,000	-\$1,200,000	-3%	\$40,000,000	\$41,500,000	100%	
Operating Income	\$250,000	\$550,000	\$350,000	\$200,000	57%	\$400,000	\$250,000	100%	
Capital Improvements	\$970,000	\$1,200,000	\$900,000	-\$300,000	-33%	\$1,025,000	\$750,000	100%	
Free Cash Flow	-\$720,000	-\$650,000	-\$550,000	-\$100,000	18%	-\$625,000	-\$500,000	100%	

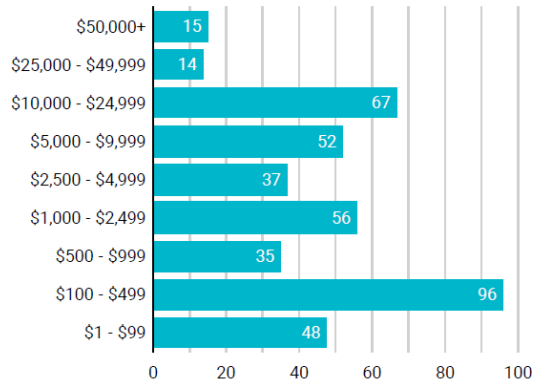
Fundraising

% of Annual Fund Goal Raised YTD vs. Prior YTD

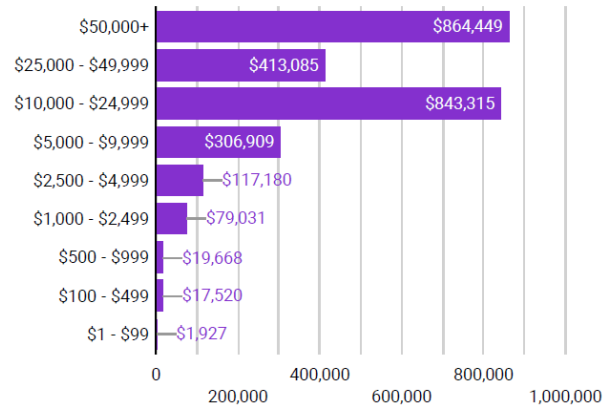
Fundraising Dashboard



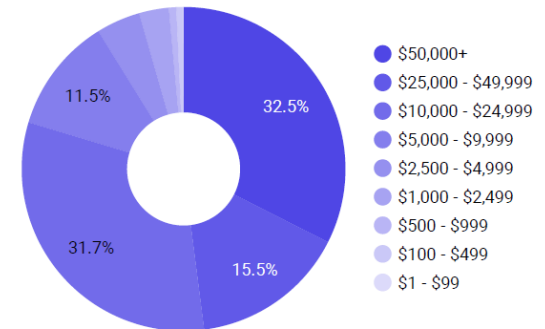
of AF Gifts by Giving Level YTD



Total AF Gifts by Giving Level YTD



Annual Fund % by Donor Giving Level YTD



Powered by **apte**

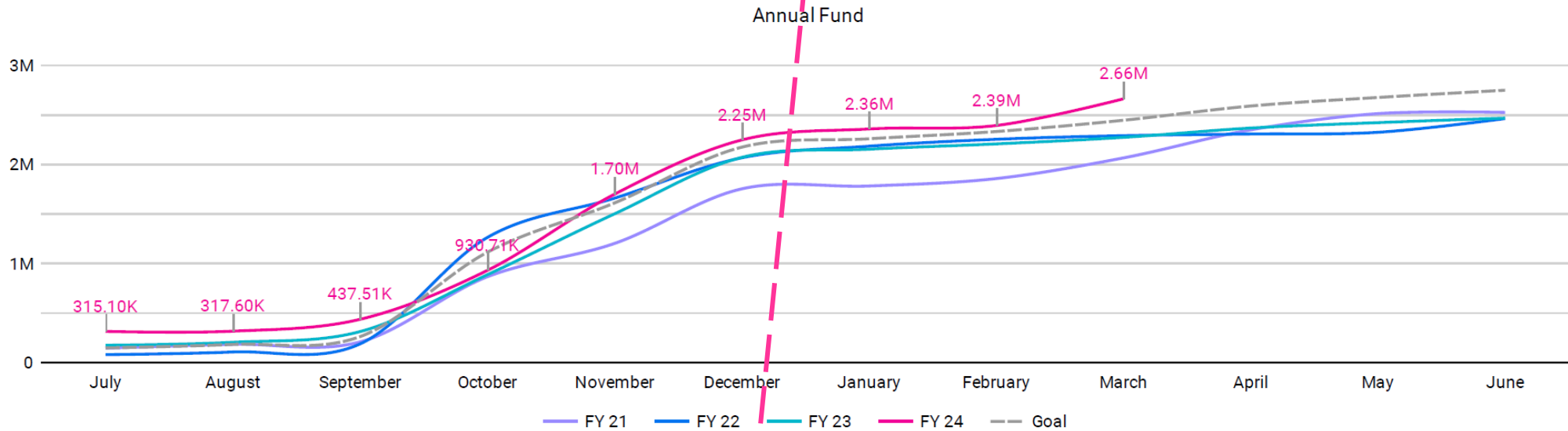
The Math

	Last Fiscal Year	Current Fiscal Year	YOY
Annual Fund Goal	\$1,000,000	\$1,500,000	+ \$500,000
YTD \$ Raised	\$750,000	\$950,000	+ \$200,000
Annual Fund % to Goal	75%	63%	- 12%

Numbers can be misleading if you aren't looking at the right metric...

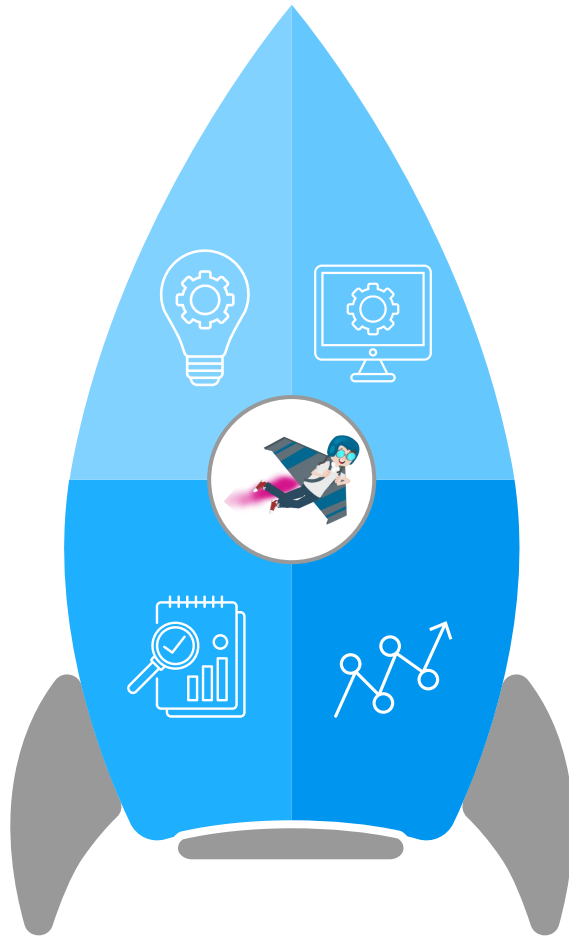
% of Annual Fund Goal Raised YTD vs. Prior YTD

Fundraising Dashboard



	FY 21 YTD	FY 22 YTD	FY 23 YTD	FY 24 YTD	\$ variance	% variance
Cash	\$971,112	\$946,062	\$899,085	\$1,055,218	\$156,134	17%
Pledges	\$887,109	\$1,308,756	\$1,309,189	\$1,607,866	\$298,677	23%
Total	\$1,858,221	\$2,254,819	\$2,208,273	\$2,663,084	\$454,811	21%
Pledge Balance Remaining	\$210,997	\$442,193	\$521,721	\$701,446	\$-179,725	-34%
% to goal	83%	96%	82%	97%		

Strategies to Stay Ahead of the Curve



01

Set goals using strategy & collaboration

02

Renewal timing impact on cash flows & visibility

03

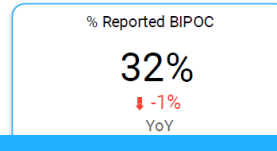
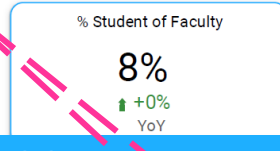
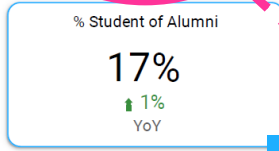
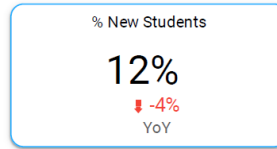
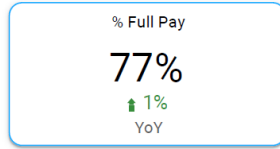
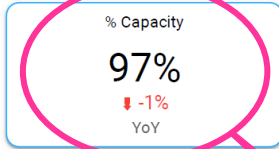
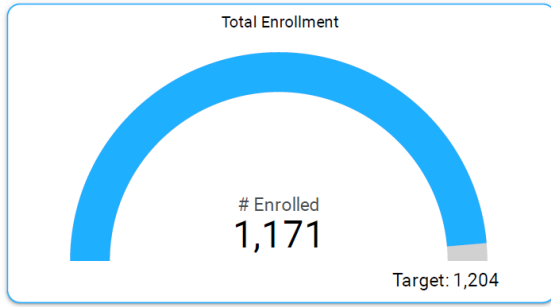
Multi-year pledge commitments

04

Creating monthly budget curves

Admissions: Capacity Planning

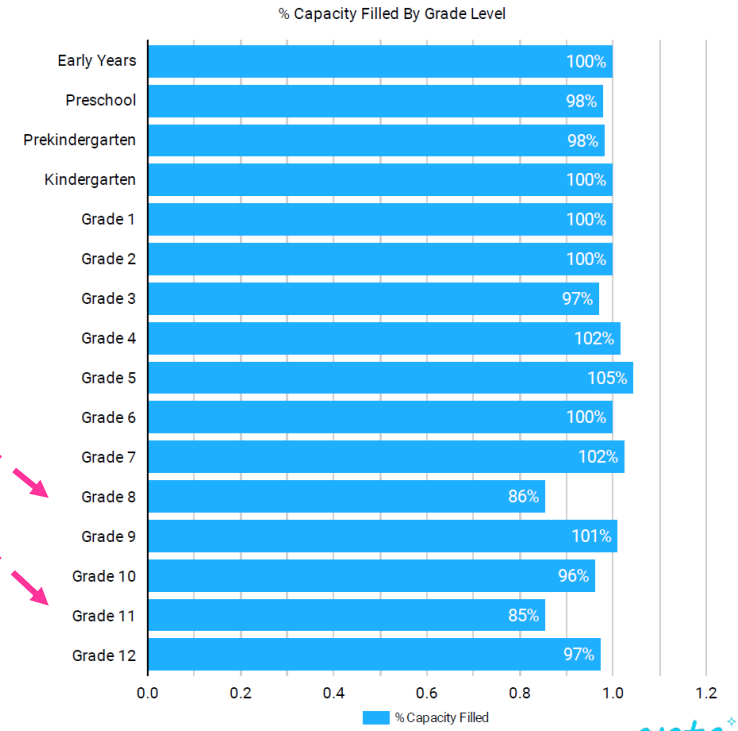
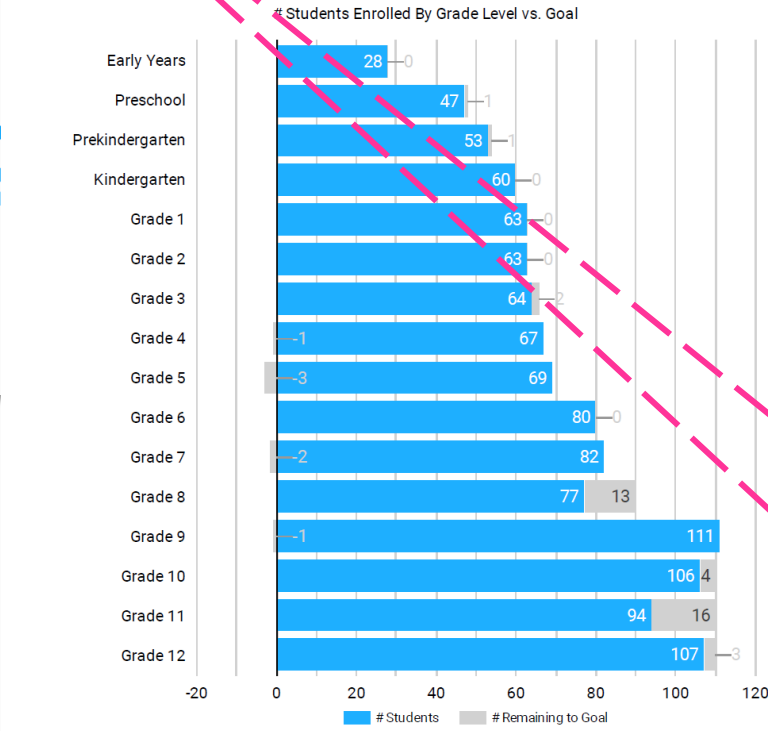
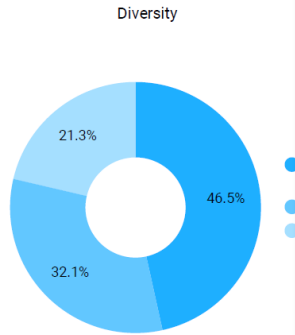
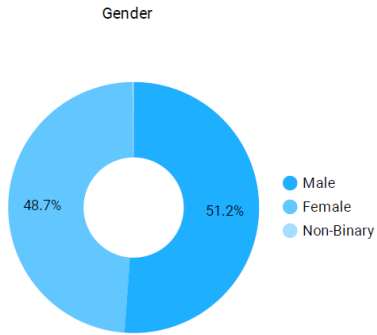
Admissions Dashboard - Current Students



GOAL

Increase enrollment by 33

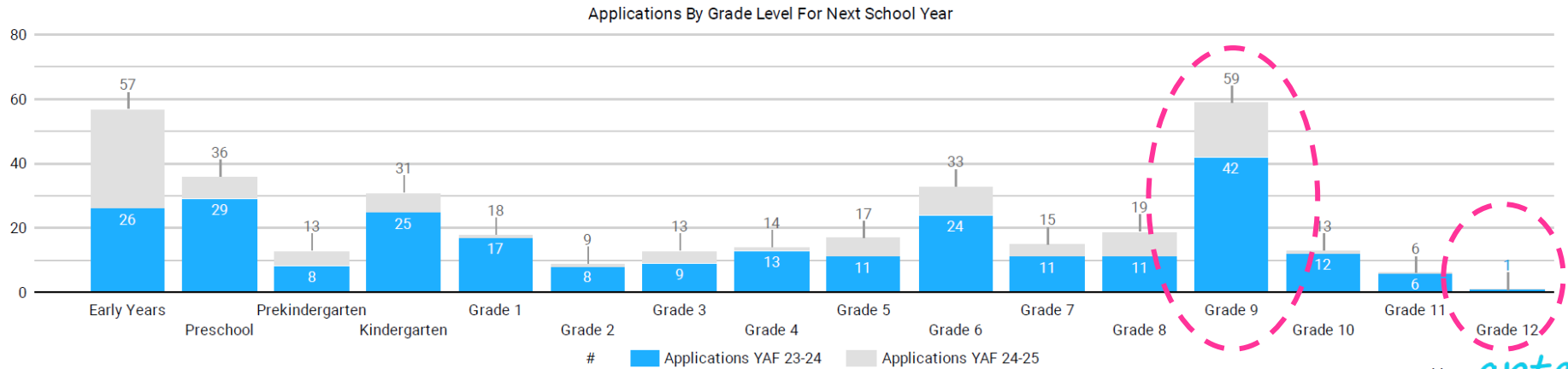
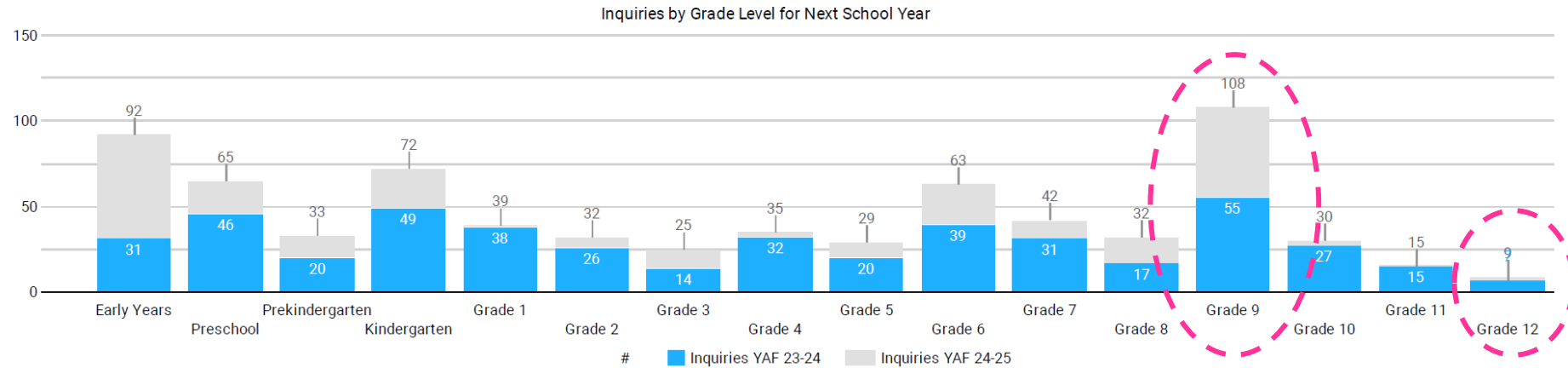
Admissions Dashboard - Current Students



Grade 8 & 11:
Under-enrolled by 29

Admissions: Capacity Planning

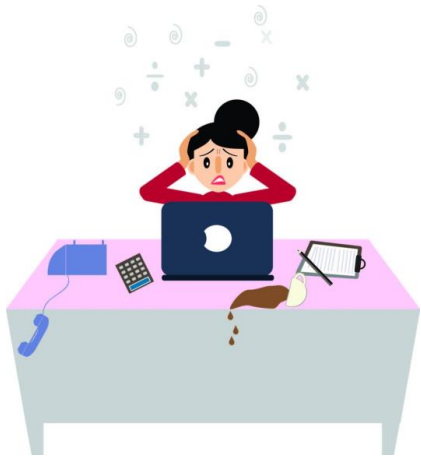
Admissions Dashboard - Enrollment



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Let's Summarize

Before



01

Define Success

02

Align metrics with strategy

03

Keep it simple

04

Track it monthly!

After



Let's Connect!

Kaitlin Windle, Founder

kaitlin@apte.io

set up a time to chat

