



SAP UNIVERSITY ALLIANCES
DASHBOARD COMPETITION CASE STUDY
JUNIOR ACHIEVEMENT

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1 OVERVIEW

The purpose of this document is to provide you with the details of our dashboard competition case study including information on:

- Customer Overview
- Project Background
- Project Objectives
- Business Requirements
- Data Source
- Next Steps and Resources

Your goal is to work in teams to go through this case study and design and develop a dashboard solution that meets the business requirements and success criteria outlined in this document.

2 CUSTOMER OVERVIEW

Company Information

Junior Achievement is a large international educational non-profit organization that impacts over 173,000 classrooms and 10 million students per year across North America, Europe and Asia Pacific. The organization's global support network comprises of over 380,000 volunteers who come from all walks of life, including business people, college students, parents, and retirees.

Junior Achievement's mission is focused on student success and giving young people the knowledge and skills they need to plan for the future and make smart academic, economic and career choices. Junior Achievement's programs focus on work readiness, entrepreneurship and financial literacy. One of the underlying goals of Junior Achievement is to inspire young people to experience and realize the opportunities and realities of work and life in the 21st century, and prepare them for success in the global economy.

Brief History

Junior Achievement was founded in 1919 by Theodore Vail president of American Telephone & Telegraph; Horace Moses, president of Strathmore Paper Co.; and Senator Murray Crane of Massachusetts.

"The future of our country depends upon making every individual fully realize the obligations and responsibilities belonging to citizenship. Habits are formed in youth...what we need in this country now ... is to teach the growing generations to realize that thrift and economy, coupled with industry, are necessary now as they were in past generations."

- Theodore Vail, president of AT&T and co-founder of Junior Achievement, 1918

Its first program, JA Company Program, was offered to high school students on an after-school basis. In 1975, the organization entered the classroom with the introduction of Project Business for the middle grades. Over the last 30 years, JA has expanded its activities and broadened its scope to include in-school and after-school students.

Today, JA reaches four million students per year in more than 120 markets across the United States, with an additional six million students served by operations in 119 other countries worldwide.

3 PROJECT BACKGROUND

Non Profits and Global Financial Crisis

The Global Financial Crisis of 2008 has had a tremendous impact on non-profits nationwide. Nonprofits rely largely on corporate donations and interest income from their endowments for special programs, operational support and long-term sustainability. With companies and consumers operating on tighter budgets, there has been a steep drop in funding for most non-profit organizations resulting in cuts to budgets and reductions in staff and programs. According to the National Council of Nonprofits, more than one-third of organizations have made cuts to operations (National Council of Nonprofits) since 2008.

For example, in 2006, ACCION international, a company that provides micro financing to poor people in developing countries received a grant of more than \$5 million from AIG, the largest corporate grant they had ever received. In 2007, AIG promised them another 1.2 million, then it was announced that AIG was taking a government bailout resulting in the loss of future donations. To make matters worse, mounting anecdotal reports from a variety of sources suggests that by the fall of 2009, most non-profit organizations were experiencing a perfect storm of increased demand for services, increased costs of operations and decreased revenues.

The impact on Junior Achievement

In a recession, the needs and services of non-profit organizations become ever more critical as more people out of work require the services of non-profit organizations. With youth unemployment reaching record highs around the world and some countries reporting more than 70 percent of young people are out of school and unemployed, JA's global mission of empowering young people to own their own economic success has become even more important.

The difficulty for Junior Achievement at this point in time is being able provide more services while facing increasing costs of operations and declining levels of funding. In 2010, JA Worldwide experienced growth across all of their key metrics:

- Students reached: 9,866,143
- Student contact hours: 180,461,888
- Volunteers: 382,637
- Classes taught: 403,849

In order to meet increasing demands and continue to provide high quality services to the community, JA needs to figure out a way to operate more strategically and efficiently.

Operational Challenges for Junior Achievement

Similar to for-profit organizations, JA faces pressures to be accountable and report on their performance. Yet as a non-profit, JA has limited resources, a small IT staff, and un-integrated information systems scattered throughout multiple organizations and databases.

As a result, the process of creating reports on key non-profit activities such as monitoring donations, evaluating program impact, or preparing financial statements can be time-consuming and labor intensive. For example, creating a global financial report requires exporting data from different systems and copying and pasting among multiple spreadsheets to generate a complete and consolidated view.

SAP and Junior Achievement

SAP has a long history of working with Junior Achievement through providing mentors, training and financial support.

In 2011, the President of the local Philadelphia chapter of Junior Achievement met with SAP's community team to learn more about business intelligence and the capabilities of SAP's dashboard software solution called Crystal Dashboard Design. As part of SAP's technology donation program, SAP provided JA with a free license copy of SAP Crystal Dashboard Design. Over the past few months, the President has worked with SAP to define their business requirements for a proof-of-concept dashboard solution concentrating on their Financial KPI's.

Since this is a new technology initiative for JA, the initial goal is to develop a dashboard that can be used at one branch focusing on a select group of financial KPI's. Over time, more KPI's will be added and the eventual goal will be to introduce this dashboard solution across the entire JA organization worldwide.

4 PROJECT OBJECTIVES

The purpose of this project is to provide the President of JA Philadelphia with a proof-of-concept dashboard solution that will allow real time access to summarized and detailed non-profit financial information. This information will provide greater insight into the financial health of JA and allow for more effective decision making to help JA deliver on its mission.

The deliverable for this project and dashboard competition will be a proof-of-concept dashboard solution focused on JA's financial KPI's.

5 BUSINESS REQUIREMENTS

Based on a vision workshop and interviews with the President of JA Philadelphia, the following KPI's have been identified for use in the dashboard solution.

Please note that the fiscal year starts in July 1 and ends June 30th

KPI	Description	
Income vs Expenses	Definition:	Income is defined as any public support and revenue items. Expense is defined as the costs of running the non-profit such as Educational Services, Program Expenses etc...
	Visualization:	Display Comparison of Total Income vs. Total Expenses as a chart component
	Time Period:	2011 vs 2010
	Data Source:	Statement of Activites Tab from JA Financial Statements.xls
Performance to Budget	Definition:	Actual revenues compared with budgeted revenues
	Visualization:	Display comparison of Actual vs Budget for 4 revenue items - corporate, individual, foundations, and special events - as a chart component
	Time Period:	2011
	Data Source:	Statement of Activites Tab from JA Financial Statements.xls

No of Contributors and average donation per year	Definition:	A contributor is an individual or company that makes a charitable donation to Junior Achievement.
	Visualization:	For each year, display the total number of donors and the average donation for that year as a chart component
	Time Period:	2007 – 2011
	Data Source:	JA Contributor List 2003 – 11.xls
Average size gift	Definition:	Average gift size is the sum of the all individual donations from a particular contributor divided by the total number of donation occurrences for a fiscal year.
	Visualization:	Provide a pick list to select a contributor and then show average gift sizes for each year from 2007 to 2011
	Time Period:	2007 – 2011
	Data Source:	JA Contributor List 2003 – 11.xls
Number, % Repeat contributors, Number of new contributors	Definition:	<p>A Repeat contributor is defined as a contributor that gives in the current year and who has given in a previous year.</p> <p>Number of repeat contributors is defined as the total number of 2011 contributors that have given at least once in a previous year.</p> <p>% of repeat contributors is defined as the total number of repeat contributors in 2011 / total number of contributors.</p> <p>Number of new contributors is defined as the total number of contributors that have given for the first time in 2011.</p>
	Visualization:	<p>Display % repeat contributors as a gauge. Green: 100% - 75%, Amber: 74% - 50%, Red: < 50% Percentage, number of repeat contributors should also be shown underneath the gauge, number of new contributors.</p> <p>Display a table with name of contributor, total contribution in current year (i.e. 2011), trend symbol (up, sideways or down). Trend is up if the total contribution in the current year (i.e. 2011) is higher or equal than the previous year of total contribution. Trend is sideways if the total contribution in the current year is equal to the previous year. Otherwise, trend is down. Sort table from highest to lowest contribution.</p>
	Time Period:	All years
	Data Source:	JA Contributor List 2003 – 11.xls
Fundraising mix	Definition:	Fundraising mix items are defined as revenue coming from these 4 sources: Corporate, Individual, Foundations, and Special Events
	Visualization:	Display fundraising mix for each year from 2007 to 2011. Hint: Consider using a stacked bar chart.
	Time Period:	2007 – 2011
	Data Source:	Statement of Activities Tab from JA Financial Statements.xls

Operating Reserve Ratio	Definition:	Operating reserves are the unrestricted surpluses that are liquid (as opposed to invested in fixed assets). The operating reserve ratio is defined as unrestricted net assets / annual operating expenses.
	Visualization:	Display as a percentage as part of a gauge. Green: 100% - 25%; Amber: 24 – 10%, Red: < 10%
	Time Period:	2011
	Data Source:	Unrestricted net assets is in the Statement of Financial Position from JA Financial Statements.xls Annual operating expenses is Total Expenses in Statement of Activities Tab from JA Financial Statements.xls

In addition to the business requirements, you should evaluate when it would be appropriate to implement the following features:

- What If / Forecasting capability.
- Alerts to show under-achieving figures
- Selectors to filter out data

For example a great what-if scenario could be "Provide a an interactive component that shows the impact on total donations by changing the average gift size and/or number of contributors" or "Using historical trends, provide a visualization that shows projected fundraising revenue by source. Provide an interactive component that shows the impact of changing the mix proportion, i.e. by increasing individual donations

6 NEXT STEPS AND RESOURCES

For next steps and online resources including a student dashboard help forum, refer to the the [Dashboard Competition event page](#) from the SAP University Alliances Community site.