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# Unlock the Power of Data for Your Nonprofit

Transform Insights into Impact

October 30, 2024



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# Session CPE Requirements

- You need to attend 50 minutes to receive the full 1 CPE credit.
- 4 Polling Questions will be launched during this session. You must respond to a minimum of 3 to receive the full 1 CPE credit.

**\*\*Both requirements must be met to receive CPE credit\*\***



# *Learning Objectives*

## At the end of this session, you will be able to:

- Identify the importance of a data strategy
- Recall how to streamline your data processes for greater efficiency
- Recognize the importance of integrated data systems for cohesive strategies
- Recall how to leverage advanced analytics to make informed, strategic decisions
- Identify techniques to transform data into actionable insights benefitting your stakeholders



# Introductions



**Ben Aase**  
Principal, Nonprofit



**Patrick Connally, Ph.D.**  
Data Analyst Manager



**Mitchell Turnbow**  
Digital Growth Director





# Key Benefits of Data-Driven Decision-Making

## Enhanced program effectiveness

- Data-Driven Insights
- Evidence-Based Adjustments

## Better fundraising strategies

- Targeted Campaigns
- Optimized Resource Allocation

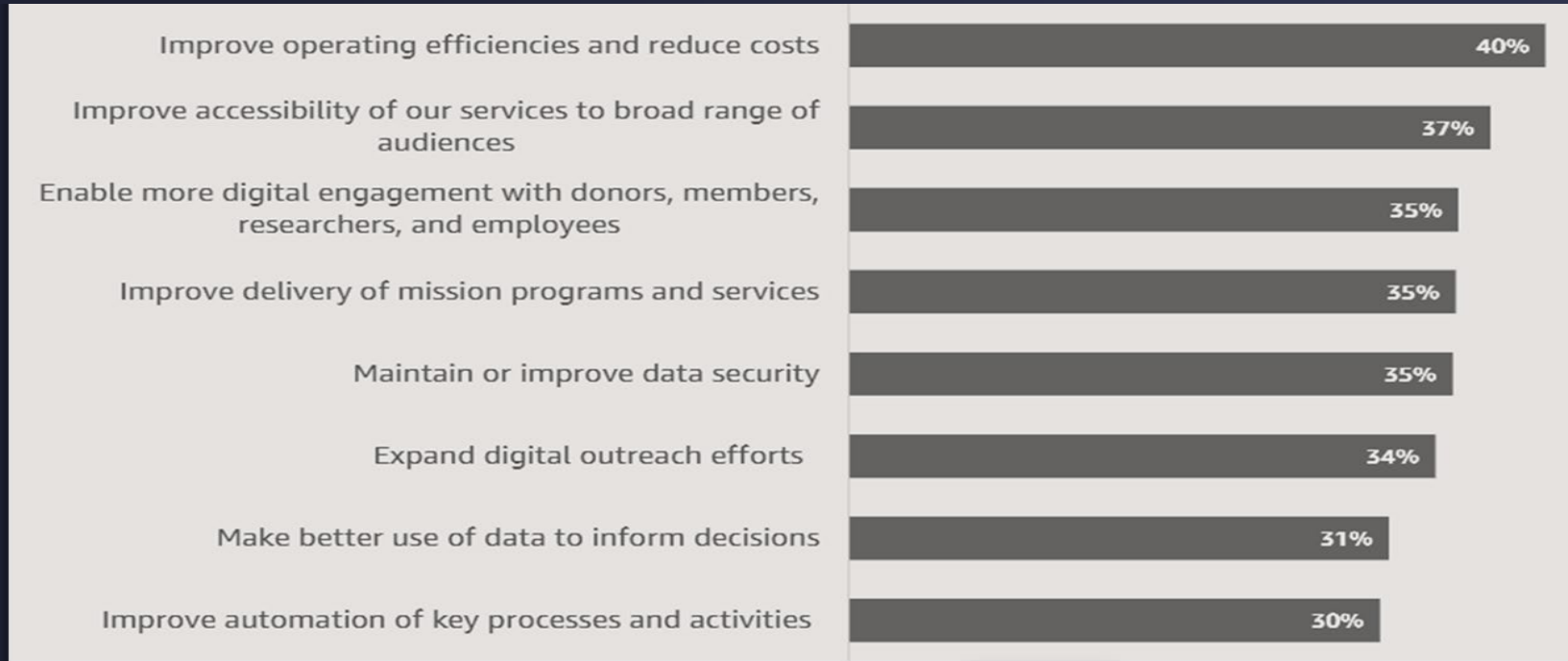
## Improved stakeholder communication

- Enhanced Transparency
- Informed Engagement



# Top Objectives

## The Importance of Data



Source: Amazon Web Services, Nonprofit Insights, March 2023.





# Polling Question

What are your main *goals* for enhancing your data analytics capabilities in the next *12 months*?

- A. Improving operational efficiency
- B. Enhancing strategic decision-making
- C. Increasing fundraising effectiveness
- D. Gaining deeper stakeholder insights





# Types of Data

1 Donor

2 Program

3 Financial

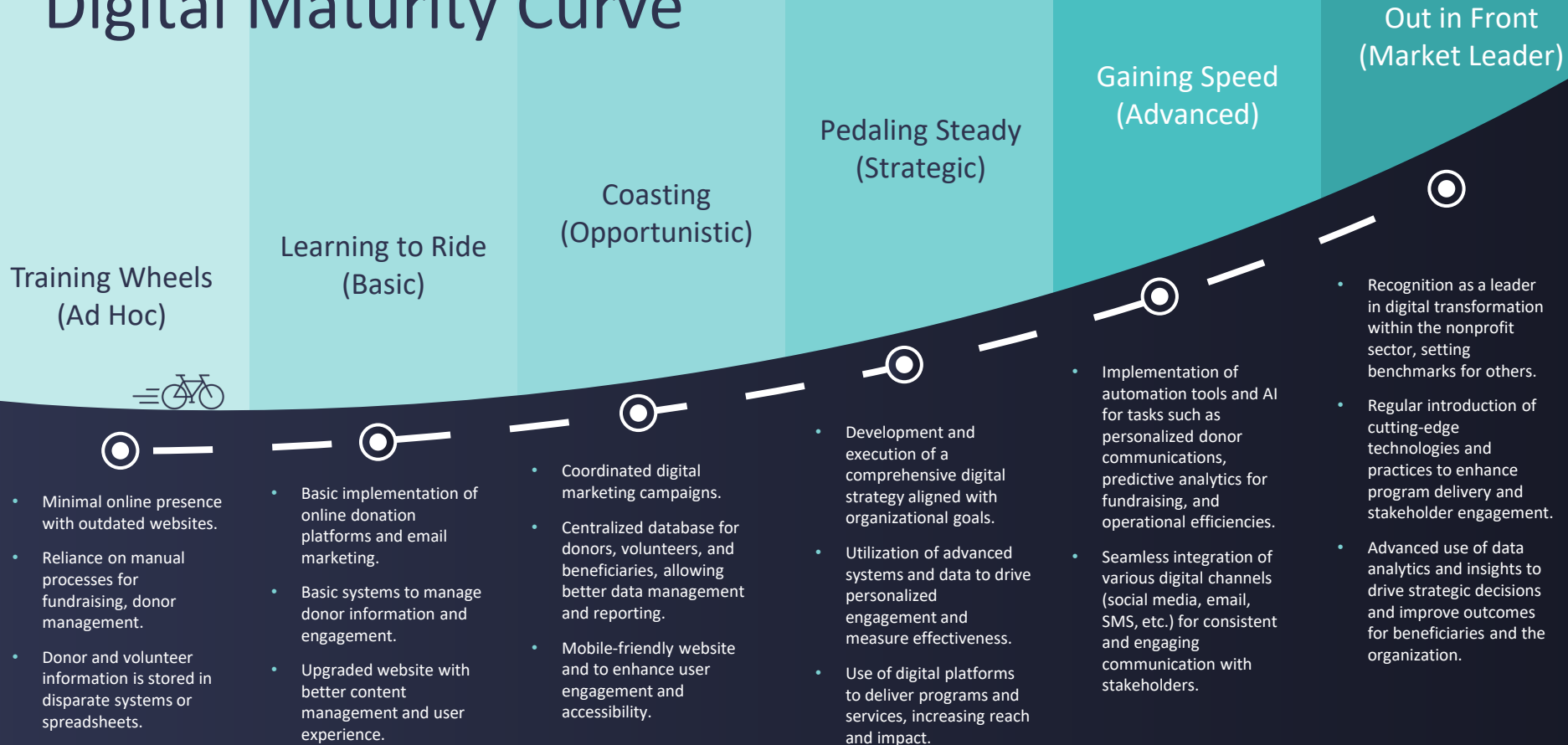
4 People



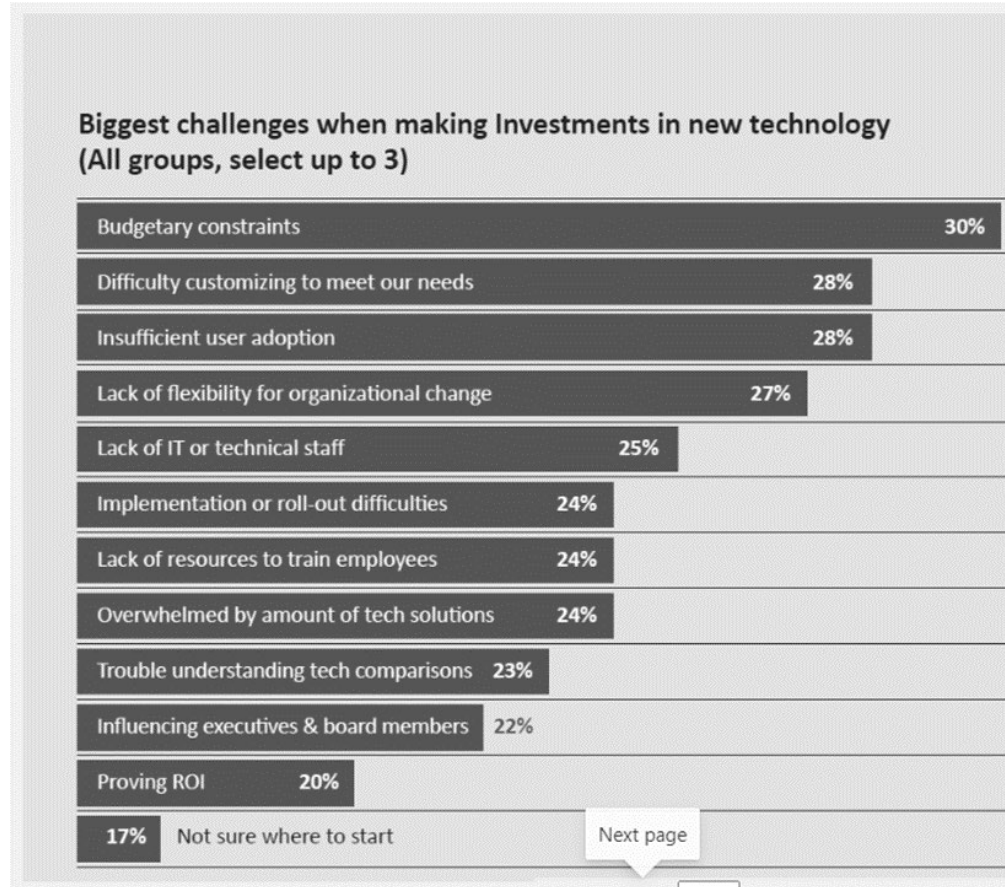
# Digital Maturity Curve



# Digital Maturity Curve



# Biggest Challenges When Investing in Digital Transformation



Source: Amazon Web Services, Nonprofit Insights, March 2023.





# Case Study:

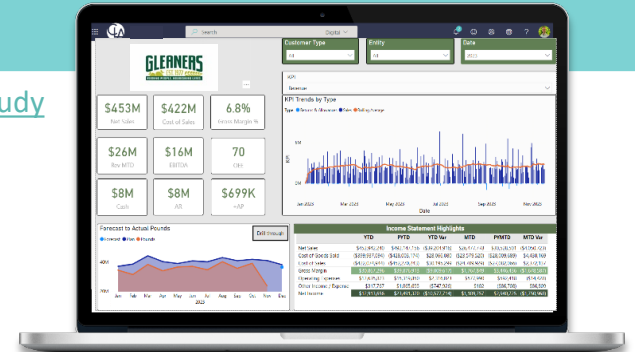
## The power of real-time analytics



“There’s no way we could operate at the level of volume and sophistication that we are today without a digital strategy. The importance of data and analytics to operate our business — we couldn’t function without it.”

-Joseph Slater, CFO/COO  
Gleaners

[Food Bank's Data Analytics Drive Growth: CLA Case Study \(claconnect.com\)](https://claconnect.com)



# Polling Question

What are the *primary challenges* your nonprofit faces with its current *data management* practices?

- A. Fragmented systems and spreadsheets
- B. Lack of centralized databases
- C. Limited data analytics capabilities
- D. Difficulty in data interpretation





Expense Type Review		Amt by Expense Type										
Credit card data date range begins with Nov 07, 2021 and ends with Aug 13, 2022												
Date	11/07/2021 - 8/19/2022	Expense Type	Search									
2368	157	154,127										
Count of Employee	Count Expense Type	Count										
<b>Split Click to drill through by Expense Detail</b>												
Expense Type	Nov 21	Dec 21	Jan 22	Feb 22	Mar 22	Apr 22	May 22	Jun 22	Jul 22	Aug 22	Vendor Clean	Amt
Hotel	\$8,435	\$175,277	\$379,382	\$613,042	\$600,731	\$699,228	\$789,276	\$261,982	\$123,023	\$123,023	MARRIOTT	\$4,411
Airfare	\$27,293	\$142,473	\$364,552	\$577,241	\$696,303	\$737,940	\$577,437	\$47,992	\$133,207	\$125,440	OUT OF	\$5,000
Supplies - PC/AVD					\$5						POCKETCASUALUNLISTED	\$12.00
ACCTGNG/CPNY											HELVON	\$5.00
Banquets - Education	\$56,117	\$108,919	\$393,245	\$553,388	\$445,458	\$460,591	\$112,684	\$355,945	\$2,086		AMERICAN AIRLINES	\$5.15
Use Only											DELTA	\$1,911
Telephone/Fax	\$32,638	\$129,791	\$256,581	\$315,472	\$422,340	\$482,225	\$377,809	\$241,009	\$112,010		SPECTRUM	\$68
Meetings	\$79	\$388,628	\$13,326	\$262,027	\$31,256	\$41,284	\$49,109	\$10,604	\$399		SOUTHWEST AIRLINES	\$79
Personal Car Mileage	\$8,632	\$62,683	\$232,026	\$463,838	\$215,297	\$202,981	\$180,593	\$108,058	\$48,047		COCACOLA	\$73
Driver	\$8,327	\$36,613	\$109,101	\$121,355	\$180,400	\$178,182	\$155,479	\$105,614	\$39,364		SOULBREEZE	\$164
Lunch	\$8,473	\$55,265	\$95,918	\$135,149	\$198,393	\$190,502	\$146,188	\$84,837	\$23,182		ENTERPRISE	\$47
Office Supplies/Software	\$10,291	\$49,653	\$184,235	\$140,954	\$180,271	\$147,093	\$114,535	\$89,246	\$39,654		JAMISON	\$47
Professional Supplies	\$8,755	\$32,350	\$82,391	\$172,481	\$122,510	\$158,170	\$80,741	\$62,815	\$38,549		APPLE	\$10
Unallocated AP Expense	\$1,617	\$56,608	\$43,110	\$94,919	\$299,083	\$30,391	\$133,916	\$60,987	\$27,195		GOOGLE	\$34
Marketing/Web	\$12,289	\$42,800	\$101,066	\$85,370	\$102,260	\$77,620	\$107,325	\$75,483	\$21,573		SHARATON	\$10
Professional	\$52,585	\$15,398	\$79,148	\$158,160	\$99,899	\$93,253	\$190,627	\$52,777	\$18,322		UNited AIRLINES	\$13
Subscriptions/Churn	\$38,000	\$38,873	\$90,170	\$113,407	\$137,315	\$114,170	\$39,263	\$6,982	\$801		INCOED	\$27
Account FENCE Payable	\$8,313	\$15,904	\$52,400	\$97,471	\$91,683	\$125,463	\$72,782	\$56,196	\$18,579		USPS	\$27
Marketing/Internet Ads												
<b>Total</b>	<b>\$324,900</b>	<b>\$2,739,266</b>	<b>\$5,239,625</b>	<b>\$5,668,767</b>	<b>\$6,213,440</b>	<b>\$5,190,040</b>	<b>\$4,537,654</b>	<b>\$5,098,992</b>	<b>\$1,147,254</b>	<b>\$</b>	<b>Total</b>	<b>\$34,547</b>



**1.** *Connecting & integrating disparate data*

**2.** *Building consumable data and reports*

**3.** *Advanced data and analytics to drive action*



# Three Steps to Elevating Your Data Toolkit



# The How

## Tools and Technologies for Data Collection



CRM Systems



Integration Tools



Data Repositories

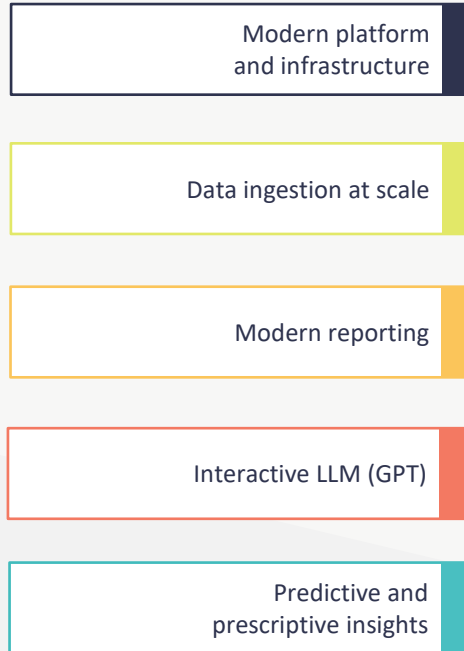


Data Analytics Platforms





## Solution Capabilities



## Strategy Pillars



## Case Study: Building a community data hub



# Polling Question



How would you rate your organization's current level of *data integration and centralized system* usage?

- A. **Very low** - We rely heavily on fragmented systems
- B. **Moderate** - We have some centralized systems but still face challenges
- C. **High** - We use integrated and centralized systems effectively
- D. **Excellent** - We have advanced, well-integrated systems



# Data Analysis Techniques

Descriptive

What *Is*

Predictive

What *Could Be*

Prescriptive

What *Should Be*



# Polling Question

What types of *advanced analytics tools* are you currently using or considering?

- A. None - We do not use advanced analytics tools
- B. Basic tools - We use some basic analytics tools for reporting
- C. Advanced tools - We use or are considering advanced analytics tools like predictive modeling or machine learning
- D. Comprehensive analytics suite - We use a variety of advanced tools and predictive models





# Case Study:

## Cleaning and connecting data sources



**CAMBRIDGE**  
Community Foundation



“ We were migrating three standalone platforms—CRM, core accounting, grantmaking—to a new system. CLA came in with the extra experience, technique, and cost-effective tools we needed to get the job done.

Geoff O-Connell  
CFO, Cambridge Community Foundation

CLA Digital helped Cambridge Community Foundation make sure they were moving forward on firm data footing by helping them identify, cleanse, and migrate key donor, financial, and grant data.



# Polling Question

Which area of your data processes would *benefit most* from streamlining?

- A. Data Collection
- B. Data Cleaning and Preparation
- C. Data Analysis and Reporting
- D. Data Storage and Management



Questions?





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