

CDM for Nonprofits and Reporting: Part 2

CDM for Nonprofits Community Events

Guiding principles

We want people to make informed decisions.

Information needs to be accessible where decisions are made.

Trustworthy information is decision-worthy information.

Reliable information is accurate, up-to-date, and semantically consistent.

Step 1: Where to start (*not tech*)

What decisions or actions are being driven by the information?

What specific questions are being asked?

What roles or individuals need the information?

What is the frequency of the decision or action?

Example scenarios

Decision or Action	Role & Frequency	Best Tech
What Opportunities require follow-up today?	Donor Management, Daily	Dynamics View
Are there any GL Transactions that don't appear to be mapped correctly?	Project Manager or Finance Manager, Weekly	Power Query -> Excel
What is the status of our funding pipeline and why?	Executive and Operational Leaders, Monthly	Power Query -> Excel -> Power BI

Step 2: Modeling

CDM for NP schema is broad and is likely to be expanded upon during implementation - too big to report on in its entirety.

Choose a subject area to focus on (e.g., Fundraising). Prioritize the questions identified and identify the tables needed.

Use Power Query in Excel to establish your queries (“get data”), perform transformations and validate that the resulting tabular data including any calculations makes sense to a subject matter expert.

Step 3: Reports

If the report is in Excel:

- **Organize/edit connections and queries for sustainability.**
- **Clean-up tabs or tables for end-user.**
- **Provide instructions in the file for how to refresh data.**

If the report is in Power BI:

- **Import your Excel file to reuse connections, queries, and models.**
- **Sketch a report layout on paper using the questions as placeholders before placing visuals.**

Step 4: Profit!

Your report will be used a million times and help your or other organizations make great decisions.

The CDM for NP Community-driven report effort is developing in developing in a great way. Excited to see the results.