A Tour of Power BI Reports You Can Use Today

June 17, 2021
Welcome!
Show and tell day!
Agenda

1. Welcome to the community!
2. Why business intelligence?
3. Microsoft’s Power BI report templates
4. Wipfli’s Power BI volunteer reports
5. Next steps
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Vision

A world where less resources are spent moving data and more time spent leveraging data to achieve the Sustainable Development Goals.
Mission

To nurture the growth of a vibrant nonprofit data model ecosystem and to more effectively achieve the SDGs through business, nonprofit, and individual collaboration.
A community for partners and nonprofit users to collaborate and grow
Online community

https://www.yammer.com/cdmfornonprofitscommunity
Information hub

Data Model for the Modern Nonprofit

The Nonprofit CDM is an open source data model for structuring data in a common way across applications and organizations.

https://www.nonprofitcdm.org
Social media

@NonprofitCDM
The data model

Overview of nonProfit

CDM 'nonProfit' Accelerators

Sub-folders

Name
- nonProfitCore
- nonProfitForSales
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Why Power BI, business intelligence?

See the full picture  
Bring details to life  
Make decisions from data  
Share insights
Reminder on Power BI

Power BI data visualization

Visualize data from multiple sources with Microsoft Power BI—spot trends as they happen so you can track and improve programming.

Get started

Power BI capabilities
Power BI options and pricing

**Power BI Desktop**
Free
Connect to hundreds of external data sources, build custom visualizations, publish to the Power BI service, and embed your

**Power BI Pro**
$3.00 user/month
All the features of Power BI Desktop plus 360-degree real-time views, auto updates, data collaboration, data access governance, and content distribution.

**Power BI Premium**
Capacity pricing per node/month
All the features of Power BI Pro, plus the ability to publish reports, unlock more capacity as needed, and distribute and embed content
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Power BI and the NCDM / F&E

Fundraising and Engagement Samples

The table below provides an overview of the sample contents.

<table>
<thead>
<tr>
<th>Sample</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>FundraisingAndEngagement.zip</td>
<td>LinkedIn Sales Navigator samples</td>
</tr>
<tr>
<td>FundraisingAndEngagement.zip</td>
<td>LinkedIn Sales Navigator samples</td>
</tr>
<tr>
<td>FundraisingAndEngagement.zip</td>
<td>LinkedIn Sales Navigator samples</td>
</tr>
<tr>
<td>README.md</td>
<td>LinkedIn Sales Navigator installation guide</td>
</tr>
</tbody>
</table>
Power BI resources for nonprofits

Nonprofit templates for Power BI
Learn what is possible for nonprofit data visualization, analytics, and insights with illustrative templates for case management, volunteer management, field resource management, and donation management.
Download templates

Find a partner
Whether you want help choosing the right Microsoft solution or the best deployment option, Microsoft partners are standing by to help you get started.
Find a partner

Power BI Training
Teach yourself at your own pace with training videos tailored to nonprofits.
Access Nonprofit training

Questions about nonprofit offers?
Microsoft representatives can help you find the right products for your organization and address inquiries related to eligibility and technical support.
Contact us
Power BI resources for nonprofits

Nonprofit templates for Power BI

Learn what is possible for nonprofit data analytics, and insights with illustrative templates for management, volunteer management, financial management, and donation management.

Download templates >

Questions about nonprofit offers?

Microsoft representatives can help you find the right products for your organization and address inquiries related to eligibility and technical support.

Contact us >
Case management

Power BI: Philanthropy - Case Management

- Cases: 202
- Total Cases by Status
- All Cases by Category
- By Gender
- By Category
- Closed Cases and Survey Scores

Available Volunteers
Deployed Field Resources
Donations Management
Case management
Field resources
Donations and fundraising

Total Donations
$2M

Donations by Campaign per Quarter

Donations by Type

Amount by Channel

Donations and Amount by State
Demo time!
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Getting to know AppSource

Get the right app for your business needs
Find solutions that enable innovation, drive business outcomes, and help you get more done with what you already have.

Explore business solutions now
Power BI reports in AppSource
Nonprofit solutions in AppSource
Volunteer Availability
Volunteer Availability

### Volunteers & Availability

<table>
<thead>
<tr>
<th>New Volunteers This Month</th>
<th>Volunteers by Qualification</th>
<th>Total Volunteers by Zip Code</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tr>
</tbody>
</table>

#### New Volunteers This Month
- **0** (Last Month: 11, I-100.0%)
- **11** (Last Year: 39, I-71.79%)
- **50** Total Volunteers

#### Volunteers by Qualification

<table>
<thead>
<tr>
<th>Qualification</th>
<th>2020</th>
<th>2021</th>
<th>2022</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advocacy</td>
<td>1</td>
<td>2</td>
<td>3</td>
</tr>
<tr>
<td>Arabic</td>
<td>1</td>
<td>1</td>
<td>2</td>
</tr>
<tr>
<td>Direct Service Delivery</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>English</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>French</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Hausa</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Hindi</td>
<td>2</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>Instructor Led Training Delivery - Course 1 (of 2)</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Instructor Led Training Delivery - Course 2 (of 2)</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Mandarin</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Portuguese</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
<tr>
<td>Spanish</td>
<td>1</td>
<td>1</td>
<td>1</td>
</tr>
</tbody>
</table>

#### Total Volunteers by Zip Code

[Map of volunteers by zip code with a focus on Wisconsin and Michigan areas.]
Volunteer Events

Volunteer Mgmt - Event Registration & Participation

WIPFLI LLP

Power BI apps

4 🌟 Ratings Write a review

Pricing Free Get it now Save to my list

Overview Reviews Details + support

Volunteer Management Event Registration and Participation Report built upon Nonprofit Accelerator

Nonprofit organizations who rely on volunteers to support their mission or who want to efficiently utilize their volunteer base need a solid and executable volunteer management strategy to support and scale their organizations and to maximize the impact they deliver. The Volunteer Management Event Registration & Participation Report enables nonprofits to analyze engagement and participation metrics to boost opportunity preparedness and drive success. This report is built upon and compatible with the Microsoft Nonprofit Accelerator core (Microsoft Cloud for Nonprofits). The Volunteer Management Event Registration & Participation Report powers involvement and increases optimization of opportunities by helping you:

- Identify gaps in event scheduling, registrations, and required qualifications.
- Pinpoint high performing programs and delivery frameworks.
- Forecast engagement to allow for efficient event planning.
- Provides Key Performance Indicators including:
  - Days Booked & Total Participation Hours
  - Volunteers by Required Qualifications
  - Registrations and Participation Over Time
  - Confirmed and Pending Registrations
Volunteer Events
Bonus Power BI reports!

+ Sponsorship and fundraising report
+ Incoming inquiries report
Demo time!
Q&A time!
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Resources to get started

- **Nonprofit Power BI templates from Microsoft**

- **AppSource nonprofit apps**

- **Wipfli volunteer templates**
How to get involved?

1. Join the community
   www.nonprofitcdm.org/join

2. Register for our workshops
   www.nonprofitcdm.org/events

3. Follow us on Twitter
   twitter.com/NonprofitCDM
Thank you!

info@nonprofitcdm.org
www.nonprofitcdm.org
Join the community!

https://www.nonprofitcdm.org/join