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# Financial Intelligence: How to Tell Your Nonprofit's Story

November 13, 2025



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# Speakers



**Tim Warren, CPA**  
Managing Principal of  
Office



**Brian Berry**  
Signing Director  
CLA Digital



“The most powerful person in the world  
is the storyteller.

The storyteller sets the *vision, values, and agenda* of an entire generation that is to come.”

— Steve Jobs



# Discussion

Discuss the type of successes and challenges you face within your organization in terms of sharing financial/nonfinancial data with various audiences





## Grounded in “Data”



# Why Do We Look at Data?



To see clearly



To identify patterns, not just outcomes



To prompt the right questions



To empower decision-making

# What's a Dashboard?

- A visual summary of key data
- Tool for tracking performance and impact
- Translation of data into decision clarity





# Where do you start?



# The Golden Rule

Relevance

- How do the selected KPIs correlate with nonprofit activities?
- How do they empower/inform decision-making?
- “What would I do differently if...”



# Selecting KPIs

## Core KPIs

- Metrics every org needs
- Supports/reflects the economic engine
- Relevant in multiple aspects of the nonprofit

## Strategic KPIs

- Supports vision objectives (temporary/mid-term)
- Non-financial
- Mission impact



# Balanced Scorecard

Financial

Operational health

The Four  
Perspectives

Mission impact

Leadership and  
culture development



# Track it



- Define the KPI and the formula for calculation
- Find the *SIMPLEST* method for getting the data points
- Automate wherever possible





# Build, Deploy, and Use

Getting Started



# Design Example

For the period ended April 2024

	Apr-23	May-23	Jun-23	Jul-23	Aug-23
<b>Income</b>					
Giving	220,214	138,753	144,062	135,753	175,936
Event Income	3,820	9,640	7,885	850	7,618
Other Income	7,810	1,217	850	807	715
<b>Total Income</b>	<b>231,844</b>	<b>149,610</b>	<b>152,797</b>	<b>137,410</b>	<b>184,269</b>

	Apr-23	May-23	Jun-23	Jul-23	Aug-23
<b>Expenses</b>					
Food and Meals	7,544	10,727	10,962	6,379	2,889
Occupancy	21,798	22,173	20,608	18,289	23,963
Operations	11,517	8,270	20,766	9,074	6,547
Event and facility fees	2,180	12,325	7,624	4,046	2,180
Salaries and Benefits	95,766	98,241	94,894	95,037	96,642
Supplies	11,257	9,735	14,910	16,194	12,537
Travel and Transportation	2,381	10,883	15,506	6,575	8,794
Transfer to Global and Other Support	23,151	15,025	14,806	14,955	18,003
<b>Total Expenses</b>	<b>175,594</b>	<b>187,379</b>	<b>200,076</b>	<b>170,549</b>	<b>171,555</b>

Net Surplus (Loss)

% Surplus (Loss)

People as a % of Income

Occupancy as a % of Income

People and Occupancy as a % of Income

People and Occupancy as a % of Income

People and Occupancy as a % of Income

People and Occupancy as a % of Income

People and Occupancy as a % of Income

FYE 2023					FYE 2024								12 Month Total	12 Month Average	Current Plan
Apr-23	May-23	Jun-23	Jul-23	Aug-23	Sep-23	Oct-23	Nov-23	Dec-23	Jan-24	Feb-24	Mar-24	Apr-24			
220,214	138,753	144,062	135,753	175,936	158,846	152,083	184,433	248,669	203,557	146,083	166,565	156,161	2,010,901	167,575	168,000
3,820	9,640	7,885	850	7,618	4,047	5,303	6,867	9,980	5,735	5,141	1,710	2,545	67,321	5,610	-
7,810	1,217	850	807	715	5,820	8,163	694	2,365	1,163	680	736	4,352	27,562	2,297	-
<b>231,844</b>	<b>149,610</b>	<b>152,797</b>	<b>137,410</b>	<b>184,269</b>	<b>168,713</b>	<b>165,549</b>	<b>191,994</b>	<b>261,014</b>	<b>210,455</b>	<b>151,904</b>	<b>169,011</b>	<b>163,058</b>	<b>2,105,784</b>	<b>175,482</b>	<b>168,000</b>

56,250	(37,769)	(47,279)	(33,139)	12,714	1,842	(51,083)	2,578	64,896	(22,807)	(26,710)	(18,003)	(17,607)	(172,419)	(14,369)	9,993
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24%	-25%	-31%	-24%	7%	1%	-31%	1%	25%	-11%	-18%	-11%	-11%	-8%	-8%	6%
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41%	66%	62%	69%	52%	58%	63%	52%	44%	51%	68%	62%	60%	58%	58%	48%
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9%	15%	13%	13%	13%	13%	15%	11%	8%	11%	15%	13%	13%	13%	13%	13%
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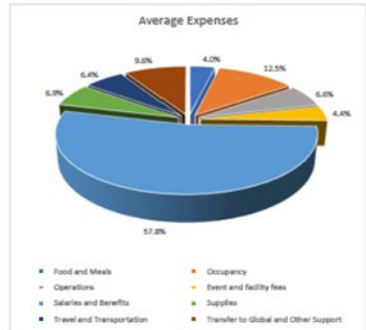
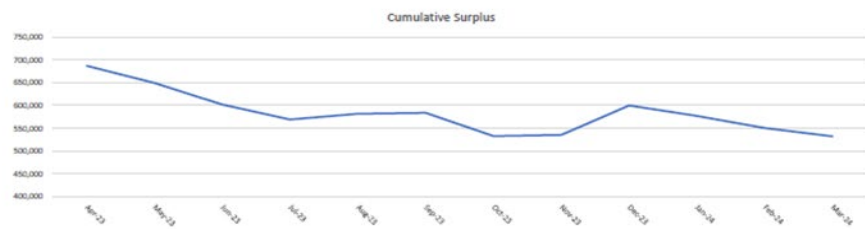
51%	80%	76%	82%	65%	71%	78%	63%	52%	62%	83%	76%	73%	70%	70%	61%
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# Why Not Copy and Paste?



Numerous data  
extracts



From multiple sources



With formatting issues



Introducing breaking  
changes



Creating confusion

Example of Formatting Issues

	A	B	C	D	E	F
1	Date	Account	AccountType	DR	CR	Total
2	4/30/2023	Giving	Income		\$ 220,214.00	\$ (220,214.00)
3		Event Income	Income		\$ 3,820.00	\$ (3,820.00)
4		Other Income	Income		\$ 7,810.00	\$ (7,810.00)
5		Food and Meals	Expenses	\$ 7,544.00		\$ 7,544.00
6		Occupancy	Expenses	\$ 21,798.00		\$ 21,798.00
7		Operations	Expenses	\$ 11,517.00		\$ 11,517.00
8		Event and facility fees	Expenses	\$ 2,180.00		\$ 2,180.00
9		Salaries and Benefits	Expenses	\$ 95,766.00		\$ 95,766.00
10		Supplies	Expenses	\$ 11,257.00		\$ 11,257.00
11		Travel and Transportation	Expenses	\$ 2,381.00		\$ 2,381.00
12		Transfer to Global and Other Support	Expenses	\$ 23,151.00		\$ 23,151.00
13				\$ 175,594.00	\$ 231,844.00	\$ (56,250.00)
14						



# How Modern Dashboards Help

Data preparation

Data calculation

Data visualization





# Demonstration

Building a Story with a Dashboard



# Key Takeaways



Combine data  
from many sources



Small Learning  
Curve



Low-Cost Tools



Simple calculation  
expressions



Powerful  
visualization



Drill down to  
details

# Directions and Next Steps

## Assessment

- When you need a strategy

## Workshop

- When you don't know what is possible

## Project

- When you know what you want



# *Insights*

Stay informed and  
prepare for what's next.



*Thank you!*

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