



# Leveraging Data for Nonprofit Success: Unlocking Insights for Strategic Decision- Making

A White Paper

**WhitworthKee Consulting, LLC**

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## Executive Summary

Nonprofits, including private foundations and community-based organizations (CBOs), generate vast amounts of internal data but may not always utilize these data to their full potential. Research from Candid,<sup>1</sup> the Centre for Effective Philanthropy (CEP<sup>2</sup>), the National Council of Nonprofits,<sup>3</sup> and Council on Foundations<sup>4</sup> highlights that nonprofits underutilize key data sources—such as grant application materials, partner<sup>5</sup> feedback, and operational records—that could significantly enhance their decision-making, demonstrate impact, and increase both their giving and receiving funding opportunities.

WhitworthKee Consulting, LLC (WKC) helps private foundations and CBOs strategically leverage their existing data in a cost-effective, sustainable manner. This white paper provides actionable insights to help nonprofit leaders identify untapped data sources, implement realistic data strategies, and develop effective data management processes. By fostering a culture of data-informed decision-making, nonprofits can streamline operations, enhance transparency, and secure stronger financial support, ultimately maximizing community impact and ensuring long-term sustainability.

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<sup>1</sup> Candid. (2023). *U.S. nonprofit sector: 2023 report*. <https://candid.org/research>

<sup>2</sup> Center for Effective Philanthropy. (2023). Trends and insights from nonprofit leaders. <https://cep.org/research>

<sup>3</sup> National Council on Nonprofits. (2025). <https://www.councilofnonprofits.org>

<sup>4</sup> Council on Foundations. (2025). <https://www.cof.org>

<sup>5</sup> Consistent with the CDC Guiding Principles, WKC chooses to use the term *partner* or *interested parties* in place of *stakeholder* as it can have colonialist connotations, which may be triggering for certain communities. (See: Calanan, R., Bonds, M., Bedrosian, S., Laird, S., Satter, D., & Penman-Aguilar, A. (2023). CDC's guiding principles to promote an equity-centered approach to public health communication. *Preventing Chronic Disease*, 20. doi:10.5888/pcd20.230061.)

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## Introduction

Nonprofits face evolving challenges due to shifting funding priorities, increased scrutiny on impact measurement, and the rising need for data-driven decision-making.<sup>6,7</sup> As funding grows more competitive, organizations that can effectively communicate their impact through data are better positioned to secure resources.

For private foundations, demonstrating effectiveness to boards and donors is critical, while CBOs must meet funder expectations through measurable results. Despite collecting valuable data—such as progress reports, participant records, case management notes, and census data—many nonprofits lack the resources or frameworks to maximize their use<sup>8,9</sup>.

By leveraging their existing data assets, nonprofits can:

- strengthen funding proposals through clear, measurable outcomes.
- use formative evaluation to assess process in real time
- demonstrate long-term impact through benchmarking and pre/post assessments
- enhance community engagement with targeted, data-informed outreach

This white paper is designed for two primary nonprofit audiences:



Private Foundations that are looking to strengthen grantmaking, board reporting, and impact measurement. If you are a Private Foundation or have a limited amount of time, head to the [Strategic Data Use for Private Foundations: Strengthening Grantmaking and Impact Measurement](#) section.



Community-Based Organizations (CBOs) who want to improve program outcomes, securing funding, and optimizing partner reporting. If you are a CBO or have a limited amount of time, please go to the [Maximizing Data for Community-Based Organizations: Enhancing Program Outcomes and Securing Funding](#) section.

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<sup>6</sup> Candid. (2023). *U.S. nonprofit sector: 2023 report*. <https://candid.org/research>

<sup>7</sup> Center for Effective Philanthropy. (2023). *Trends and insights from nonprofit leaders*. <https://cep.org/research>

<sup>8</sup> Lee, J. (2022). Data utilization challenges in nonprofit organizations: A systematic review. *Journal of Nonprofit Management and Leadership*, 33(2), 215-232.

<sup>9</sup> Nonprofit Technology Network (NTEN). (2023). *State of nonprofit data: Opportunities and challenges*. <https://nten.org/research>

Both types of organizations share a common challenge: Ensuring that data assets—grant applications, donor interactions, program evaluations—are effectively leveraged to drive decision-making and long-term sustainability. This paper outlines cost-effective strategies to help nonprofits transition from basic data collection to data organization, utilization, and robust program evaluation.

## Common Challenges in Data Utilization

Nonprofits collect extensive data but often struggle to use them effectively due to resource constraints, siloed systems, and funding pressures.<sup>10,11</sup> Key challenges include:

- **Limited Resources:** Many organizations lack dedicated staff, funding, or technical infrastructure for robust data analysis. Staff often juggle multiple roles, leaving little time for in-depth data utilization.
- **Data Silos & Fragmentation:** Information is often stored across separate departments, preventing a comprehensive view of program performance or client impact.<sup>12</sup>
- **Funding & Impact Measurement:** Securing funding requires compelling data narratives, yet many nonprofits lack structured processes for tracking and communicating the outcomes of their efforts.<sup>13</sup>
- **Staff Capacity & Expertise:** Without dedicated data specialists, program staff may handle data tasks as secondary duties, leading to inconsistent use and limited expertise. Professional development in data analytics is also often underfunded due to competing priorities.

By reframing these challenges into opportunities that emphasize organizational strengths and practical solutions, nonprofits can move from merely collecting data to actively using insights to strengthen proposals, enhance strategic decisions, and clearly demonstrate their impact.<sup>14</sup>

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<sup>10</sup> Nonprofit Technology Network (NTEN). (2023). *State of nonprofit data: Opportunities and challenges*. <https://nten.org/research>

<sup>11</sup> Lee, J. (2022). Data utilization challenges in nonprofit organizations: A systematic review. *Journal of Nonprofit Management and Leadership*, 33(2), 215-232.

<sup>12</sup> Kim, M., & Lee, J. (2021). Overcoming data silos in nonprofit organizations: Practical strategies for enhancing data-driven decision making. *Nonprofit Management & Leadership*, 32(1), 47-64. <https://doi.org/10.1002/nml.21473>

<sup>13</sup> Nonprofit Finance Fund. (2023). *Annual report 2023*. Nonprofit Finance Fund. <https://nff.org/annual-report-2023>

<sup>14</sup> Ibid.

## Scalable Data Strategies for Nonprofit Impact

Nonprofits do not need expensive technology or dedicated data staff to implement data strategies. By incorporating simple, actionable steps, organizations can improve decision-making, strengthen impact measurement, and maximize funding opportunities.

### Key Steps to Strengthen Data Use

- 1 Audit Existing Data** – Identify available data, where those data are stored, and how those data can be optimized.
- 2 Train Staff** – Utilize free training platforms (Coursera, NTEN, TechSoup) to enhance internal staff's data skills.
- 3 Leverage Free Data Tools** – Use tools like Google Looker Studio, Canva, or Tableau Public for alternative options for reporting.
- 4 Align Data with Goals** – Focus on quality over quantity, collecting only what serves mission impact.
- 5 Seek External Expertise** – Use data-sharing networks or short-term consultants for focused and impactful improvements.

By taking small, strategic steps, nonprofits can shift from passive data collection to active data use, enhancing transparency, funding opportunities, and long-term sustainability.

## Strategic Data Use for Private Foundations

Private foundations play a critical role in supporting nonprofit initiatives, but demonstrating the long-term impact of their funding requires structured data strategies. Boards, donors, and other partners increasingly expect data-driven reporting to assess how grants contribute to meaningful change. By leveraging data effectively, private foundations can refine funding strategies, improve transparency, and strengthen their decision-making processes. Table 1 presents how foundations can strategically utilize various data sources across their core functions: Strategic grantmaking, field-building, accountability, and collaborative efforts.

## Table 1: Data Sources Foundations Can Use for Evaluation

Data Source	Strategic Uses	Field-Building Uses	Accountability Uses	Collaborative Uses
<b>Grantee Program Data</b>	Identify effective interventions across portfolios to inform funding priorities	Identify sector-wide trends and needs	Demonstrate collective impact of funding strategies	Create shared measurement frameworks with consistent metrics
<b>Cross-Grantee Outcome Measures</b>	Compare results across similar programs to identify best practices	Track evolution of emerging practices	Ensure grantee programs are implemented as intended	Identify funding gaps or overlaps in particular issue areas
<b>Financial Data</b>	Analyze cost-per-outcome across different approaches	Identify operational efficiencies across the sector	Track how grant dollars flow through organizations	Coordinate funding approaches with other foundations
<b>Publicly available Census and Community Data</b>	Identify geographic or demographic gaps in service coverage	Understand systemic issues affecting target populations	Assess whether funding strategies influence systems-level change	Build combined datasets from public and private sources
<b>Case Management Data</b>	Understand participant journeys across different program models	Identify common challenges facing specific populations	Verify that services reach intended beneficiaries	Share anonymized insights across multiple funders
<b>Administrative Data</b>	Evaluate operational models across grantees	Identify sector-wide bottlenecks	Monitor grantee performance consistently	Develop standards for administrative efficiency
<b>Progress Reports</b>	Make real-time adjustments to funding strategies	Track the evolution of promising practices	Report on foundation impact to boards and partners	Track long-term community changes beyond individual grant cycles

By synthesizing information from multiple data sources across their organization, foundations can gain comprehensive insights into program outcomes. Grantee program data and cross-grantee outcome measures help identify high-impact interventions, while financial data can provide information about cost-effectiveness or the return on initial investments. Adding data from publicly available sources such as those that collect census and community data provides essential context on external factors influencing outcomes. By triangulating evidence across diverse sources and tracking progress through administrative data and reports, foundations can refine grantmaking strategies to maximize impact and efficiency.

# Maximizing Data for Community-Based Organizations

CBOs must demonstrate impact to funders while often operating with limited data resources. Effectively using existing data can strengthen grant applications, improve program delivery, and enhance funder relationships. While many organizations collect participant data, program activity records, case management notes, and administrative data, they often lack systems for strategic analysis.<sup>15</sup> Table 2 outlines how CBOs can use existing data for both formative and outcome evaluations, eliminating the need for additional collection efforts.

**Table 2: Data Sources Community-Based Organizations (CBOs) Can Use Data for Evaluation**

Data Source	Formative Evaluation Use	Outcome Evaluation Use
<b>Participant Data</b>	Analyze demographics to adjust recruitment strategies and program design	Track which demographics benefit most from services and achieve desired outcomes
<b>Program Activity Records</b>	Compare planned vs. actual implementation to identify components needing modification	Link specific program components to participant outcomes to determine what drives the greatest change
<b>Case Management Notes</b>	Identify common barriers participants face to develop responsive program adaptations	Extract qualitative outcomes and success stories that illustrate quantitative findings
<b>Administrative Data</b>	Analyze participant flow, dropout points, or service bottlenecks	Track service dosage and its relationship to outcome achievement
<b>Progress Reports</b>	Track implementation milestones to make adjustments	Demonstrate incremental outcome achievement over time
<b>Financial Data</b>	Conduct cost analyses of different program components to optimize resource allocation	Calculate cost-effectiveness and return on investment for different outcomes
<b>Census Data</b>	Compare program reach against community demographics to identify underserved populations	Benchmark participant outcomes against broader community indicators
<b>Funding Information</b>	Align program adjustments with funder priorities while maintaining the organization mission integrity	Analyze how different funding structures influence program sustainability and outcome achievement

<sup>15</sup> Hassan, B. A., & Qader, S. M. (2021). *A new framework to adopt multidimensional databases for organizational information system strategies*. arXiv preprint arXiv:2105.08131.

By synthesizing information from multiple data sources, CBOs can pinpoint high-impact program components, add qualitative insights from case management notes, and track service utilization patterns. Financial data helps assess cost-effectiveness, while publicly available census comparisons provide a broader community benchmark. A strategic, integrated approach enhances impact measurement, funder communication, and resource allocation.

## Innovative Data Tools for Nonprofit Growth

Data-driven tools offer nonprofits new opportunities to improve decision-making, fundraising, and efficiency.<sup>16,17</sup> However, their adoption depends on budget, mission, and organizational size. Private foundations and CBOs must evaluate which tools align with their needs while considering cost, feasibility, and ethics.

Rather than seeing technology as a barrier, nonprofits can take a practical approach, integrating solutions that fit their existing resources and operational realities. Table 3 presents various data tools that can be utilized based upon the organization's budget, analytical needs, and data management capabilities.

**Table 3: Data Tools Based on Budget and Needs**

Challenge or Need	Low-Cost Solution	Mid-Range	High Investment
<b>Disconnected Data Systems</b>	Google Sheets, Airtable (free)	Smartsheet, Monday.com (affordable nonprofit plans)	Salesforce Nonprofit Cloud
<b>Limited Data Visualization</b>	Tableau Public, Google Looker Studio (free)	Canva Pro for Nonprofits	Power BI, Domo
<b>Need for Automated Reporting</b>	Zapier (basic tier), Power Automate (free)	Custom-built Excel macros	Full grant management software
<b>No Dedicated Data Staff</b>	Free online courses (DataCamp, Coursera, TechSoup)	Consultant-led workshops	Full-time data analyst
<b>Difficulty Demonstrating Impact</b>	Pre-built KPI templates (Excel, Google Sheets)	Subscription-based impact measurement tools	Advanced donor analytics platforms

<sup>16</sup> Candid. (2023). *U.S. nonprofit sector: 2023 report*. <https://candid.org/research>

<sup>17</sup> Nonprofit Technology Network (NTEN). (2023). *State of nonprofit data: Opportunities and challenges*. <https://nten.org/research>

## Conclusion: Turning Data into Impact

Nonprofits collect valuable data, but without a clear strategy, much of these data go underutilized or unused. By adopting cost-effective, scalable approaches, organizations can transform data into a powerful tool for funding, transparency, and program effectiveness. Strategic data use leads to stronger, more sustainable impact by:



**Maximizing funding opportunities** – Funders and boards expect data-backed success stories, strengthening grant applications and donor trust.



**Improving program outcomes** – Tracking trends helps refine services and ensure resources have the greatest impact.



**Enhancing operational efficiency** – A data-driven approach reduces redundancy and improves decision-making.

## Moving from Data Collection to Strategy

This white paper outlines practical steps for nonprofits to:

- Leverage existing data without major system changes.
- Foster cross-team collaboration.
- Use free or low-cost tools for data analysis and reporting.

WhitworthKee Consulting helps nonprofits build sustainable, low-cost data strategies that go beyond compliance—we work with our partners to create tailored approaches that facilitate long-term success. If your organization is ready to take the next step in practical data utilization, contact us at [info@whitworthkee.com](mailto:info@whitworthkee.com) to start the conversation.

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