

Simple, Affordable Reporting Energizes Nonprofits

Easy-to-use and painless information collection, reporting, and analysis in nonprofit organizations ensures accountability, accelerates achievement, and allows professionals and volunteers to focus on serving constituents.

Abstract

Reporting is a significant burden on NFP organizations. It only begins with capturing the myriad bits of information that track day-to-day and campaign-specific performance targets. That requires compiling and integrating data, frequently from multiple internal and external sources, all using different computer systems. It also demands different kinds of analysis to make the data relevant and actionable to groups accountable for diverse and vital commitments, from administration and communication to constituent relations and fund raising. Then, organizations must distribute the results, frequently in multiple formats, to individuals in various locations with particularly differentiated expectations, responsibilities, and interests.

The burden is compounded by the complexity of information technology infrastructures. As nonprofit organizations grow, they adopt best-of-breed solutions for all their different needs, from accounting and email to event management and donor outreach. That kind of growth tends to scatter relevant data across multiple computer systems, many of which do not easily communicate or integrate with one another. Further, nonprofit leaders can't afford to convert every volunteer and professional into computer wizards who can negotiate the complex technologies that support their organization.

Today, though, innovative technology is enabling charitable groups to easily gather, analyze, and distribute the information necessary to maximize the potential of all their relationships with constituents. This kind of collaborative technology solution unlocks the potential of every nonprofit organization and enables mission success.

How Did We Get Here?

Nonprofit organizations grow organically and add information technology functionality as necessary and as staff or volunteers have knowledge, ability, time, and resources. As the number and variety of computer programs proliferate, every decision-maker gets a copy of every program to use those programs' information and analysis, or gets a dedicated conversion of the data into a common format such as a word processing document or spreadsheet.

Eventually, if reporting doesn't grow increasingly infrequent or simply go by the wayside, it becomes very expensive or dependent on a few highly skilled technical experts -- or both. Because of the cost of purchasing multiple software licenses or the labor-intensive conversion into common formats, nonprofits allocate substantial money and time to the essential reports they need, or reporting becomes isolated to only a few computers at the organization's main office or chapters.

Further, compiling all that important internal information in a single, actionable, real-time resource becomes virtually impossible because data exists in the proprietary formats of particular applications. As a result, nonprofit organizations run the constant risk of out-of-date, out-of-sync, or corrupted data. Leaders face the equally frustrating risk that the person who knows how to operate that application, or understands the schedule or workflow, will be absent at a critical moment.

In the same way, nonprofits rely on numerous and various external and internal organizations to deliver information -- Web site traffic, direct mail results, event turnout, more every day. Those reports tend to proliferate as nonprofit leaders identify new ways to advance their mission. Collecting that polyglot of individual documents and integrating charts, graphs, digits, and narratives into a unified, actionable language becomes a tedious manual process of translating oranges and limes (and the occasional tomato) into a simple apple.

Corporations leverage enterprise resource planning software that integrates every aspect of their business operations in every location around the world. Unfortunately, similar solutions in the nonprofit world are prohibitively expensive. Interim or partial solutions require nonprofit leaders to lock in all their data with service providers that disrupt their existing procedures and require extensive -- and expensive -- training for all current and all future employees and volunteers.

Leveraging Your Information

Reporting is the essence of organizational accountability and a day-to-day necessity. For most nonprofits, a contribution from a donor may go unnoticed until a report is run manually at the end of the day or week. The contribution collection software may automate the distribution of a brief, generic email to confirm processing of the donation by a credit card company; after that, it requires the generation of another report to transfer the donor's information into a database and perhaps a second report to propagate a more formal written acknowledgement of the contribution. Each new report or transfer of information from one system to another introduces the risk of corrupting the data, electronically or manually.

At the end of the week or month, the nonprofit organization's executive and development director will review all the donor information from that period. Getting that data in an actionable form -- with apples compared to apples and all the relevant information in one place -- requires those leaders to pick and choose which fields they want to retrieve from which systems. It even assumes they know all the data that's being collected through years of software upgrades or new solutions implementations. An IT expert has to run a report on all those fields; that report is then handed to another expert to sort and analyze, who then has to handle the administrative tasks related to printing and delivering the report or hand it off to yet another busy person for that purpose. Then, if the executive and development leader identify a trend that requires additional insight, they have to ask for more reporting and wait for the IT and accounting experts to extract and analyze the data and deliver it to them -- probably just in time for next week's or next month's meeting.

In other words, nonprofit leaders might have to request and wait on the generation and analysis of multiple reports simply to discover that a particular event or message has attracted more generous donations than anticipated. Their ability to collect and analyze their data, which exists in a hodge-podge collection of programs on various platforms, few of which were designed to communicate with one another, is simultaneously complex and time-consuming:

- Delivery of a "data dump" to all decision makers in the organization is wasteful and may actually be counterproductive, creating confusion and consuming resources that the organization could better apply in fulfillment of its mission.
- Most recipients will not have the computer programs necessary to run reports or understand them in a relevant organizational context. Providing access to those

applications or the expertise to operate them creates costly and time-consuming demands on administrative and IT staff.

- The skills required to develop and run queries, filter data, and merge internal and external reports across such systems as Web site analytics, the donor database, and campaign and event management requires access to a few highly technical professionals. This bottleneck creates waiting lines for important information and prevents key decision makers from analyzing data by drilling down or generating multiple views of their data on demand.
- Proprietary applications tend to create silos of knowledge about information and processes in the organization. Such isolation prevents a holistic, integrated organizational perspective of constituents and business processes.

The challenge of reporting in nonprofit environments means that it takes more time or resources than necessary -- time the organization could otherwise dedicate to its mission -- or that important data goes unreviewed, or both.

According to Randy McCabe, “Every minute spent gathering organizational performance data for analysis and distribution is a minute nonprofit leaders and their organizations could spend better by serving their constituents or raising funds to extend their capacity to do so.” McCabe is the founder and CEO of Orange Leap, a company of experienced technology and nonprofit professionals who are dedicated to offering innovative, easy-to-use software that strengthens relationships with constituents and other nonprofits.

A Better Way of Controlling Your Information

Recognizing the challenges of collecting, analyzing, and distributing data in nonprofit organizations, McCabe and his colleagues at Orange Leap developed a simple, affordable strategy for every nonprofit to apply the maximum leverage to its information. The reporting solution they devised, ***The Guru***, is unlike any other reporting solution currently available for nonprofits. It vastly simplifies the process for collecting and analyzing data, enabling an organization to create and share reports in just a few minutes that used to take hours or days.

Critically, this Web browser-based, wizard-driven, open-source reporting solution works with any of the systems a nonprofit organization use to store the data required to understand and optimize its own operations. In other words, nonprofit leaders no longer

have to decide whether to give up a best-of-breed application in exchange for reporting across their systems. And, because it's based on the industry-standard open-source JasperServer technology, already trusted by Fortune 500 companies around the world for their heavy-duty business intelligence and integration demands, Orange Leap can offer its solution for free with a transparent, honest, and low-cost subscription for support.

With The Guru, nonprofit leaders no longer need information technology experts to achieve the organizational effectiveness goals of reporting. Using its simple wizards, or in consultation with Orange Leap's support team, anyone in the organization -- from the executive to a front-desk volunteer -- can tell The Guru what information to monitor and analyze. With just a few mouse clicks, The Guru enables immediate reporting and analysis of events and information combined with the easy anytime/anywhere access of the Internet. And, because it is the only open-source data integration and reporting solution that is entirely independent of the platforms and architectures that currently limit collaboration, The Guru enables organizations to maximize the impact of a holistic view of their operations.

In contrast to the earlier description of generating and analyzing multiple reports simply to support a regularly scheduled meeting, The Guru can accomplish the same thing automatically. Using easy-to-understand plain-language software wizards -- the kind that help guide users to automate all kinds of processes on their computers -- a nonprofit organization can simply tell The Guru to pull the necessary data, sort it into a spreadsheet or chart, and deliver it by email to the executive and development director 15 minutes before their meeting starts.

Once in that meeting, the participants can work backwards through the big picture to drill down into any data that prompts a question or suggests a trend. Without waiting on IT support or a stopover in the accounting office, the executive and development director can immediately identify the source of, or reason for, any results in their reports.

And, The Guru can apply the same simple, wizard-driven reporting to any data that exists anywhere within a nonprofit organization's systems. From administration to campaign management and communications, The Guru allows nonprofit leaders to automatically monitor and analyze any specific item of information -- and the relationships among multiple items of information.

Because it does not care what kind of program or database stores information, The Guru makes reporting and analysis of all an nonprofit's key performance indicators simple by automating the collection of data from diverse, disparate, and disconnected

sources -- even sources external to the organization. Likewise, The Guru automates distribution to individuals or groups only the data and analysis relevant to them. It provides that information in the most appropriate format, such as Excel, PDF, HTML, .csv, or Flash, using easily updated design-once/use-forever reports. And, because it is truly an open-source solution with a robust developer community inside and outside the nonprofit sector, it's easy to create or find new interfaces as organizations change and technology advances, so nonprofits no longer need to risk locking their information in a proprietary program or system.

A Catalyst for Your Most Critical Mission

Today, compilation and distribution of reports is time- and labor-intensive, requiring the generation of reports from multiple computer systems on a person-dependent schedule and the manual integration of external and internal reports. The burden of reporting falls squarely on nonprofit leaders who are more interested in serving their constituents and advancing the mission of the organization.

The Guru is a new, truly open-source solution for integrating and analyzing a nonprofit organization's data. A wizard-based approach allows nonprofits to create tabular, summary, cross-tab, or matrix reports quickly and easily -- or any combination of those reports, so apples are compared to apples -- without requiring any knowledge of the data structure or the applications or platforms on which the data resides. The Guru's scheduling and delivery features allow anyone in the nonprofit, regardless of technical expertise, to:

- Collect and analyze only the data they need only when it's needed;
- Create reports that are relevant to specific audiences in the formats they want;
- Deliver those reports to the intended recipients without regard to whether they have access to the software that originated the data; and,
- Get value of the results by immediately drilling down into information that will help them take organizational performance to the next level.

Because it is built on the same IT foundation trusted by the world's largest global corporations, nonprofit leaders can be confident that The Guru will aggregate data from virtually any application and run on all common operating systems -- Microsoft Windows, Macintosh OS, Linux, and even hand-held devices like Blackberries, iPhones,

and smart phones. The Guru enables nonprofits of any size to leverage the same analytical capability used by the world's largest institutions and businesses through a simple yearly support-per-data-source pricing model that makes true enterprise business intelligence affordable for even the smallest organizations. And, unlike solutions that merely claim to be open, The Guru -- at zero initial investment -- provides users with extensive, sophisticated reporting and collaboration capabilities and allows them to share the best, most innovative, and most productive templates and practices created by the Orange Leap community.

Orange Leap's The Guru is a catalyst for collaboration that puts velocity behind nonprofit organizations' most critical mission: fundraising and constituent management. By centralizing and automating data analytics, it unlocks each organization's full potential. No more robust, easy-to-use, or affordable solution exists for nonprofit organizations that want to effectively integrate and manage the data necessary to support productive and valuable relationships with constituents.

About Orange Leap

Orange Leap energizes nonprofits, making it easier for them to achieve mission success. The Dallas-based company (formerly known as MPower Open) offers innovative yet simple to use software-based solutions that strengthen relationships with constituents and other nonprofits. Orange Leap's ever-growing community collaborates on advanced technology and smarter practices using Orange Leap's open-source code. Nonprofits big and small, with a wide range of missions and constituencies, choose Orange Leap to move their organizations forward. For more information, please visit www.orangeleap.com.

Contact Information

Mailing Address:

Orange Leap
13800 Montfort Drive
Suite 220
Dallas TX 75240

Phone: 1 (800) 562-5150

Website: <http://www.orangeleap.com>

Email: info@orangeleap.com