The Nonprofit Storytelling High Wire Act: Balancing Quantitative and Qualitative Data

Jasmine Marrow
Director of Nonprofit Strategy, GuideStar

Lauren Shaughnessy
Director of Measurement and Learning, Habitat for Humanity San Francisco

Peter Manzo
President and CEO, United Ways of California
The High wire Balancing Act
The two elephants in the room…

**ELEPHANT #1**

Some **nonprofits** are better than others

They create more social or environmental impact per dollar.

**ELEPHANT #2**

Some **donors** are better than others

Their donations create social or environmental impact per dollar.
Agenda

1. The **good**, the **bad**, and the **ugly** of storytelling
2. What are the **challenges**?
3. Getting **started**
Let’s start with the ugly...
Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation) The organization may have to use a copy of this return to satisfy state reporting requirements.

A. For the calendar year, or tax year beginning 1-1-2003 and ending 12-31-2003

B. Check if applicable: Name change Initial return Final return

C. Name of organization HANDICAP INTERESTS INTL WO RELIGION

D. Employer identification number 13-3566610

E. Telephone number 516-891-5466

F. Accounting method: Cash Accrual

G. Web site: ARCHIVE.107 SCRIBNER AVE. NY 10307

H. H-1 and H-2 are not applicable to section 527 organizations if applicable to section 527 organizations.

I. If "Yes," enter number of affiliates: 0

J. Are all affiliates included? Yes No

K. Check here if the organization's gross receipts are not more than $25,000. If not, file a return with the IRS. If the organization received a Form 990 Package in the mail, it should file a return without financial data. Some states require a complete return.

B. BRANCHES ELSEWHERE:

G. Gross receipts: Add lines 8a, 8b, 8c, and 10a to line 12a $1,677,500

Part 1 Revenue, Expenses, and Changes in Net Assets or Fund Balances

1. Contributions, gifts, grants, and similar amounts received:
   a. Direct public support.
   b. Indirect public support.
   c. Government contributions (grants)
   d. Total (add lines 1a through 1c) (cash $2,080,500 noncash $600,000)

2. Program service revenue including government fees and contracts (from Part VII, line 93)

3. Interest on savings and temporary cash investments

4. Dividends and interest from securities

5. Total revenue $2,400,000
### GuideStar Summary

<table>
<thead>
<tr>
<th>Category</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Updated Profile</td>
<td>Organization has not updated their GuideStar Nonprofit Profile</td>
</tr>
<tr>
<td>Registered with IRS</td>
<td>Legitimacy information is available</td>
</tr>
<tr>
<td>Financial Data</td>
<td>Annual Revenue and Expense data reported</td>
</tr>
<tr>
<td>Forms 990</td>
<td>2013, 2012, and 2011 Forms 990 filed with the IRS</td>
</tr>
<tr>
<td>Mission Objectives</td>
<td>Mission Statement is available</td>
</tr>
<tr>
<td>Impact Summary</td>
<td>Impact Summary from the nonprofit is not available</td>
</tr>
</tbody>
</table>

*Average rating from 42 Personal Reviews | Write a Review*
Annual Revenue & Expenses  (IRS Form 990, January 2013)

Fiscal Year Starting: January 01, 2013
Fiscal Year Ending: December 31, 2013

Total Revenue: $10,960,587
Total Expenses: $10,200,014
National Audubon Society, Inc.

Audubon’s mission is to conserve and restore natural ecosystems, focusing on birds, other wildlife, and their habitats for the benefit of humanity and the earth’s biological diversity.

Revenue vs. Expenses

Comparing revenue to expenses shows how the organizations finances fluctuate over time.
THE SPARKPOINT MODEL: 10 KEY FINDINGS

1. On average, it takes about 8-10 months for SparkPoint clients to achieve a **financial prosperity goal**.

2. 70-85% of clients maintain their financial goals after achieving them. More clients retain the credit outcome than any other outcome (i.e. income, debt, savings).

3. 15-30% of clients lose a financial prosperity outcome after achieving it, and 80-85% of them have yet to re-achieve it.

4. To date, 177 clients have achieved self-sufficient income and at least one other financial prosperity outcome. 61% of them achieved self-sufficient income first, or at the same time as another outcome.

5. 61% of clients return to SparkPoint to complete a second follow-up assessment (usually 6 months after completing a baseline).

6. On average, clients who have been with SparkPoint consistently for two or more years increased their monthly income by $807, improved their credit score by 39 points, and decreased their debt by $10,586.

7. 76% of the clients who have been with SparkPoint consistently for two or more years have increased their savings during their time at SparkPoint. The average savings increase is $2,969.

8. Of the clients who have been with SparkPoint consistently for more than two years and have achieved financial outcomes, the outcome most often achieved first is building savings.

9. Achieving financial goals is not a linear process. Families are constantly in flux on their path to financial prosperity.

10. 74% of clients who achieve all **financial stability** or all **financial success** outcomes have maintained all of the outcomes. Clients who have achieved financial prosperity have maintained it for an average of 7 months (to date). Clients are more likely to maintain their level of income, credit, or savings the longer s/he is with SparkPoint.
FINDING 8: Of the clients who have been with SparkPoint consistently for more than two years and have achieved financial outcomes, the outcome most often achieved first is savings. More clients increased their savings equal to two weeks, one month, or three months of living expenses before achieving any other outcome—or at around the same time as achieving a credit, debt, and/or income outcome.

Although the sample size is small, this finding suggests multiple pathways towards achieving financial prosperity. While some build savings before increasing income, others increase income before achieving other financial goals.
PROPERTIES IN DALY CITY AND SAN FRANCISCO ARE IN LOW INCOME TRACTS THAT ARE EXPERIENCING ADVANCED DISPLACEMENT

Source: Berkeley Urban Displacement Project
ON AVERAGE, HABITAT HOMES HOUSE LARGER FAMILIES, AND ARE MORE LIKELY TO HAVE CHILDREN OR BE A FEMALE HEADED HOUSEHOLD

*HomeKeeper defines seniors as 65 and over, while the ACS defines seniors as 60 and over.

Source: Census data
✓ Connects to the bigger picture
✓ Contextualizes the story
✓ Articulates evidence of impact at scale
✓ Donors increasingly expect it

So…..
Why is this so rare?
Barrier #1 – Choosing the ‘Right’ Data

• What’s the scale?
• Outputs vs Outcomes
• Learning vs Marketing
Barrier #2 – Acquiring Data Fluency

SEE, I TOLD YOU THAT BIG DATA WAS TOO SCARY
Discussion
Getting started!

• Funding
• Tools
• Outreach
A nonprofit’s investments in training, planning, evaluation, and internal systems—investments in itself—are how a nonprofit sustains and improves its impact on the world.
GuideStar Nonprofit Profile

<table>
<thead>
<tr>
<th>Total Revenue:</th>
<th>$55,824,204 in 2010</th>
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<tbody>
<tr>
<td>Contributions:</td>
<td>$5,540,700</td>
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<tr>
<td>Gov't Grants:</td>
<td>$8,288,600</td>
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<tr>
<td>Program Services:</td>
<td>$7,974,570</td>
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<tr>
<td>Investments:</td>
<td>$7,365,000</td>
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<tr>
<td>Special Events:</td>
<td>-$17,880</td>
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<tr>
<td>Sales:</td>
<td>$1,235,336</td>
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<tr>
<td>Other:</td>
<td>$1,214,474</td>
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70% of total revenue

<table>
<thead>
<tr>
<th>Total Expenses:</th>
<th>$81,898</th>
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<tbody>
<tr>
<td>Program Services:</td>
<td>$62,964</td>
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<tr>
<td>Administration:</td>
<td>$6,466</td>
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<tr>
<td>Fundraising:</td>
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Four Levels of Participation

- 8,258 organizations
- 16,647 organizations
- 8,187 organizations
- Coming soon

All totals as of 2/7/2016
<table>
<thead>
<tr>
<th>Bronze</th>
<th>Silver</th>
<th>Gold</th>
<th>Platinum</th>
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<tbody>
<tr>
<td>Contact Info</td>
<td>Audited Financial Statement OR</td>
<td>Long term Goals</td>
<td>Quantitative Programmatic Metrics</td>
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<tr>
<td>Mission Statement</td>
<td>Fiscal Year</td>
<td>Strategies</td>
<td>Narrative to explain your metrics</td>
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<tr>
<td>Area Served</td>
<td>Revenue Sources</td>
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<td>Keywords</td>
<td>Expenses</td>
<td>Indicators</td>
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<td>CEO Info</td>
<td>Liabilities</td>
<td>Progress in reaching goals</td>
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<td>Board Info</td>
<td>Assets</td>
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</tr>
<tr>
<td>Lists of Programs</td>
<td></td>
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</table>
Sector–Wide Growth

• Squash the Overhead Myth
• Educate donors
• Get more data in front of relevant donors
• Publicly show organizational progress year to year
• Benchmark metrics against peers
• Lift up best practices
Discussion
Audience Questions

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