Excel for Non-profit administrators: Half-day workshop

Lesson 1: Excel and the non-profit data stack

Lesson 2: Data entry

Lesson 3: Data cleaning

Lesson 4: Data analysis

Lesson 5: Data presentation

Recommended preparation: Introductory Excel, half-day workshop

Learning Objectives

- Student can identify appropriate use cases for Excel in non-profit data administration
- Student can build integrity checks into data entry process
- Student can build repeatable processes for common data cleaning tasks
- Student can calculate common non-profit data analysis metrics
- Student can create visualizations and reports using principles of information design

Lesson 1: Excel and the non-profit data stack
Objective: Student can identify appropriate use cases for Excel in non-profit data administration
Description:
- What is a spreadsheet and when do you use it?
- Tour of the stack: spreadsheets, databases/data warehouses, business intelligence/dashboard platforms
- Identifying the best tool for given scenarios

Time: 20 minutes

Lesson 2: Data entry
Objective: Student can build integrity checks into data entry process
Description:
- Conditional formatting
- Data validation
- Protected cells & ranges
- Removing duplicates
- Restoring & comparing workbook versions

Time: 45 minutes

Lesson 3: Data cleaning
Objective: Student can build repeatable processes for common data cleaning tasks
Description:
- What is reproducibility?
- Row-wise transformations: sorting, filtering, filling, aggregating
- Column-wise transformations: delimiting, creating calculated fields, cleaning and converting variables

Functions/tools used:
- Power Query

Time: 45 minutes

Lesson 4: Data analysis
Objective: Student can calculate common non-profit data analysis metrics
- Tracking year-over-year performance
- Tracking donor activity: retention, donor level moves, engagement, loyalty
- Tracking efficiency and efficacy: program, fundraising, operational

Functions/tools used:
- Date functions
- PivotTables

Time: 50 minutes

Lesson 5: Data presentation
Objective: Student can create visualizations and reports using principles of information design
- Choosing the right visualization
- Creating on-brand visual assets
- Visualizing geospatial data
- From visualization to dashboard

Functions/tools used:
- Charts
- Power Map

Time: 50 minutes