



STANFORD SOCIAL INNOVATION REVIEW PRESENTS

# DATA ON PURPOSE

TELLING GREAT STORIES WITH DATA

February 9, 1:45 – 2:45 p.m.

## 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



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# 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.



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# 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...



(✓) ORIGINAL

12/31/2003

(✓) original

EIN 13-3566610

990

(✓) ORIGINAL

# 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.

IRS  
OGDEN

UT 84  
OMB No 1545-0047

2003

Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

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

B Check if applicable:

- ☒ Address change
- ☐ Name change
- ☒ Initial return
- ☐ Final return
- ☐ Renewal return
- ☐ Application pending

Please use IRS label or print or type. See Specific Instructions.

C Name of organization

HANDICAP INTERESTS INT'L (WORLD RELIGIOUS GROUP)

Number and street (or P.O. box if mail is not delivered to street address) Room/suite

P.O. Box 1173

(P.O. Box 1173)

City or town, state or country, and ZIP + 4

SARANAC LAKE, NEW YORK 12983

D Employer identification number

13-3566610

E Telephone number

(518) 891-5466

F Accounting method

- ☒ Cash
- ☐ Accrual
- ☐ Other (specify)

G Web site

107 Scribner Ave. SE, Atlanta, GA 30316

H Organization type (check only one)

- ☒ 501(c)(3) (insert no.)
- ☐ 4947(a)(1) or
- ☐ 527

K Check here

☐ If the organization's gross receipts are normally not more than \$25,000. The organization need not file a return with the IRS; but 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.

Gross receipts: Add lines 8b, 8c, 9b, and 10b to line 12

\$2,145,500.00

H and I are not applicable to section 527 organizations

H(a) Is this a group return for affiliates?

- ☐ Yes
- ☒ No

H(b) If "Yes," enter number of affiliates

H(c) Are all affiliates included?

- ☐ Yes
- ☒ No

(If "No," attach a list. See instructions.)

H(d) Is this a separate return filed by an organization covered by a group ruling?

- ☐ Yes
- ☒ No

I Enter 4-digit GEN

M Check ☒ If the organization is not required to attach Sch. B (Form 990, 990-EZ, or 990-PF).

## Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (See Specific Instructions on page 16.)

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 \$470,999.00 noncash \$600,000.00)

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

3 Membership dues and assessments

4 Interest on savings and temporary cash investments

5 Dividends and interest from securities

1a	\$2,080,500.00
1b	
1c	\$600,000.00

1d	\$808,050.00
2	\$240,000.00
3	\$13,500.00
4	\$500.00
5	

Submit

on

3/31/04

To IRS  
Hillsdale  
NY  
00501

Rev. Karmel

Page 2

APR 27 04

VED

Summary

Financials

Forms 990 &  
Docs

People &  
Governance

Programs

Impact

External  
Perspectives

Contractors

## GuideStar Summary



Updated Profile

Organization has not updated their  
[GuideStar Nonprofit Profile](#) ?



Registered with IRS

[Legitimacy information is available](#)



Financial Data

[Annual Revenue and Expense data reported](#)



Forms 990

[2013, 2012, and 2011 Forms 990 filed with the IRS](#)



Mission Objectives

[Mission Statement is available](#)



Impact Summary

[Impact Summary from the nonprofit is \*not\* available](#)



[Average rating from 42 Personal Reviews](#) |  
[Write a Review](#)



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Summary

Financials

Forms 990 &  
Docs

People &  
Governance

Programs

Impact

External  
Perspectives

Contractors

## 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**



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GUIDESTAR GuideStar Pro Search Advanced Search Update Nonprofit Profile Products Blog

Pro Search Tools -

ENVIRONMENTAL QUALITY PROTECTION, BEAUTIFICATION

## National Audubon Society, Inc.

New York, NY [www.audubon.org](http://www.audubon.org)

NATIONAL HEADQUARTERS PARENT

DONATE TO THIS ORGANIZATION

GuideStar Charity Check - National Audubon Society, Inc.

IRS Pub 78 Verified December 2015 Most Recent IRS Publication 78

IRS ERF 509(a)(1) December 14, 2015 Most Recent IRS ERF

View Summary View PDF Report

Summary Story of the organization at a glance

Programs + Results How do they make a difference?

Financials Gauging financial health by the numbers

Operations People, practices, and partners

National Audubon Society, Inc. MISSION STATEMENT

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.

Summary

Programs + Results

Financials

Operations

BACK TO TOP

MAIN PROGRAMS

1. Conservation Programs

REVENUE VS EXPENSES

The comparison of revenue versus expenses illustrates the financial state of an organization over time.

Source: IRS Form 990

1998

Revenue \$73,245,456

Expenses \$49,161,319

RULING YEAR 1972

CHIEF EXECUTIVE David Yarnold

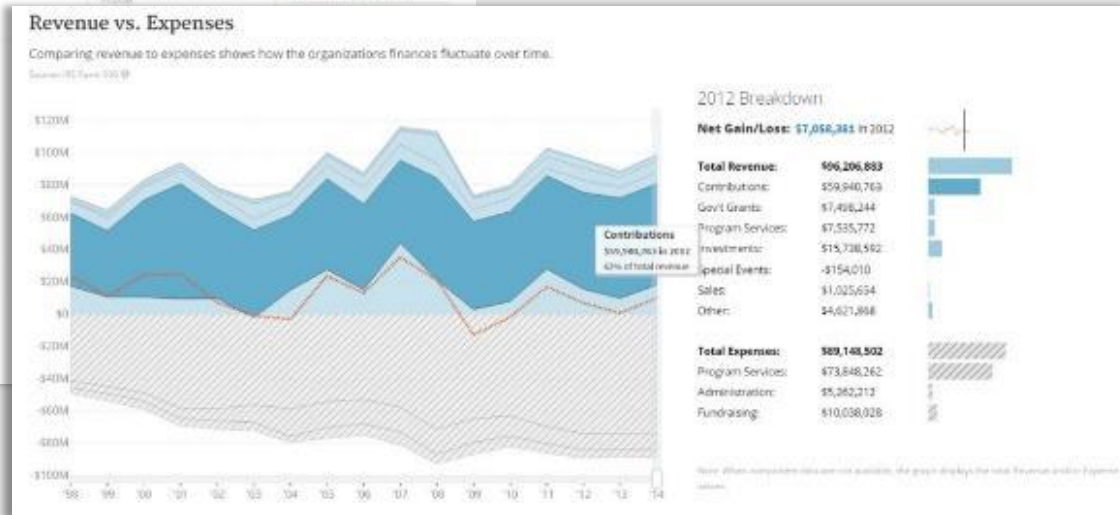
Source: Audubon Nonprofit Profile

Audubon Tax Forms (Forms 990)

Download

EIN 13-1624102

IRS Subsection 501(c)(3) Public Charity



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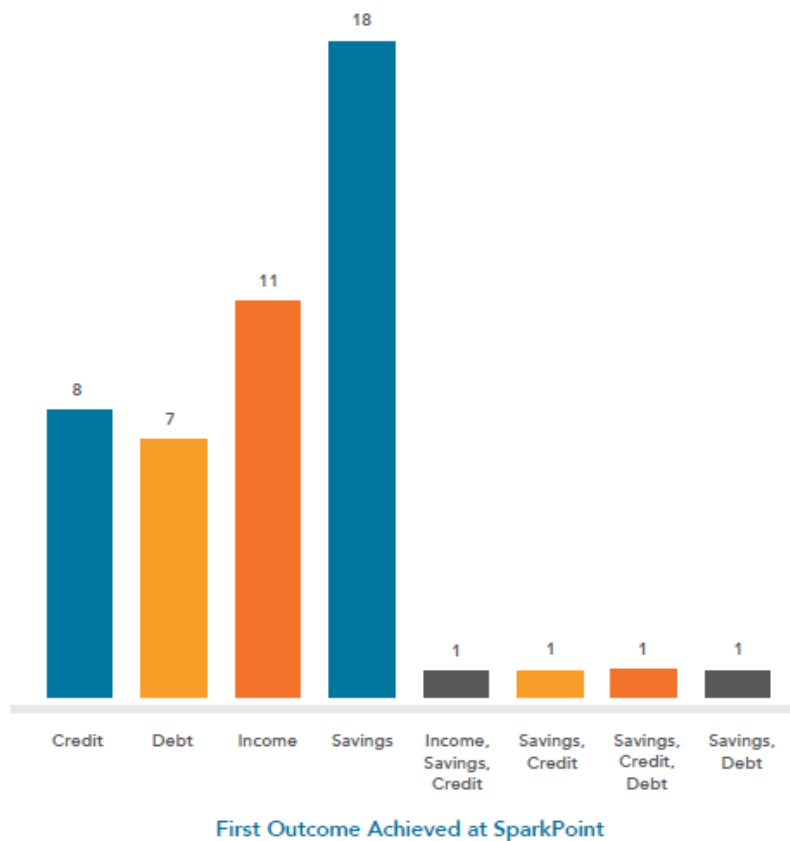
# Stanford SOCIAL INNOVATION Review

## 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.

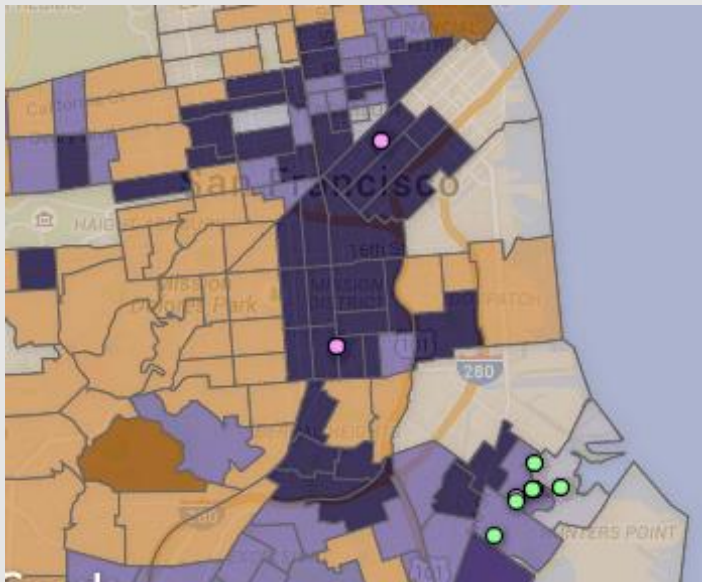
Although the sample size is small, this finding suggests multiple pathways towards achieving financial prosperity. While some build savings before increasing income, others increase income before achieving other financial goals.



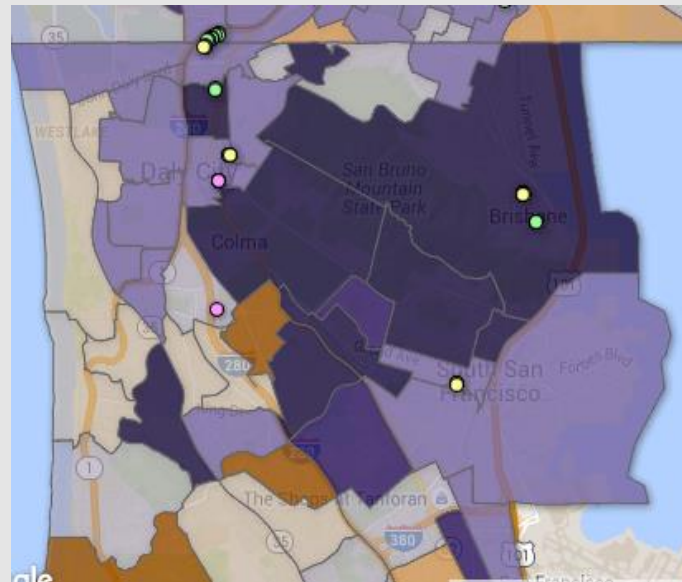


# PROPERTIES IN DALY CITY AND SAN FRANCISCO ARE IN LOW INCOME TRACTS THAT ARE EXPERIENCING ADVANCED DISPLACEMENT

San Francisco County



South San Francisco / Brisbane / Daly City



Low Income (LI) Tracts

- Not losing LI households / very early stages
- At risk of gentrification or displacement
- Undergoing displacement
- Advance Gentrification

High Income (HI) Tracts

- Not losing LI households / very early stages
- At risk of displacement
- Undergoing displacement
- Advance Exclusion

● Condominium Unit ● Townhome ● Single Family-Detached

Source: Berkeley Urban Displacement Project



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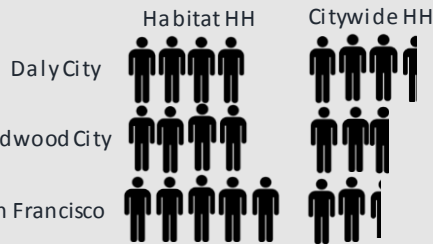
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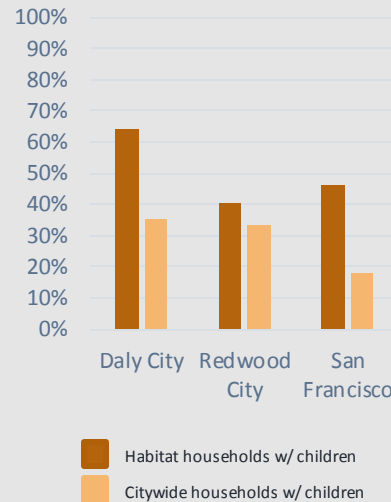
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# ON AVERAGE, HABITAT HOMES HOUSE LARGER FAMILIES, AND ARE MORE LIKELY TO HAVE CHILDREN OR BE A FEMALE HEADED HOUSEHOLD

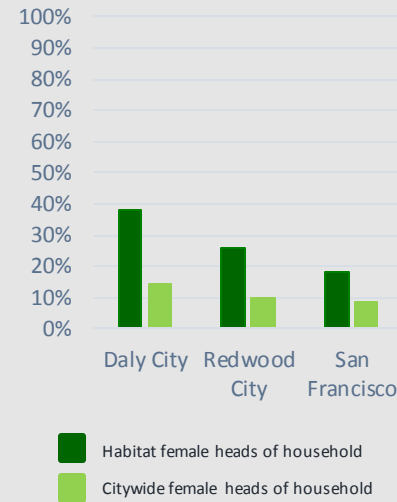
Average Household Size



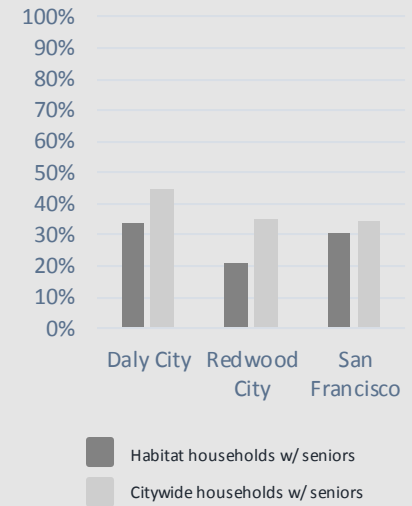
Households with Children



Female Heads of Households



Households with Seniors\*



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

Source: Census data



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- ✓ 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







# Discussion



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# Getting started!

- Funding
- Tools
- Outreach

# THE OVERHEAD MYTH

[www.overheadmyth.com](http://www.overheadmyth.com)

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.



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Attending to the "Unsexy"  
Side of Scaling: Sustainable  
Funding – Paul Carrar blog



Donors Forum's Commitment to Full-Cost Funding

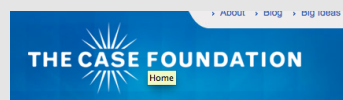


Summit To End The Overhead Myth: Meeting Report

*Overhead Summit II  
Funding to Support Scale and Results*

*Events & Initiatives*

*Grantmakers*



**Social Impact Exchange**  
Taking successful innovation to scale



GUIDESTAR®



CHARITY NAVIGATOR  
Your Guide To Intelligent Giving



Corporation for  
NATIONAL &  
COMMUNITY  
SERVICE ★★★★★

Social  
Innovation  
Fund



*Watchers & Helpers*

*Grant Receivers*

(Thousands of NGOs)



A YEAR  
AGO



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**THE OVERHEAD MYTH**  
A GUIDESTAR INITIATIVE TO IMPROVE DONOR CHOICE

**Scaling What Works**  
geo

**Rethinking How Grantmakers Support Scale**

**Attending to the "Unsexy" Side of Scaling: Sustainable Funding** – Paul Carrara blog

**BDO** **UBS** **InsideNGO** **Donors Forum**

**Summit To End The Overhead Myth: Meeting Report**  
**Donors Forum's Commitment to Full-Cost Funding**

**DON'T ASK IF A CHARITY HAS LOW OVERHEAD. ASK IF IT HAS BIG IMPACT.** **CHARITY EXPANSION**

**THE PERFORMANCE IMPERATIVE**  
A FRAMEWORK FOR SOCIAL SECTOR EXCELLENCE

**RE-CONSTRUCTING PHILANTHROPY FROM THE OUTSIDE-IN**  
**A Funder-to-Funder Point of View**  
Paul Shoemaker, Executive Connector  
Social Venture Partners

**CliftonLarsonAllen**  
**Third Annual CLA National Foundation Conference**

**Inside Philanthropy** **Philanthrosaurus Rex: Why the Age of Big Foundations Is Almost Over**

**The REAL COST Project**  
Real Cost. Real Outcomes  
A joint initiative of Northern California Grantmakers, San Diego Grantmakers and Southern California Grantmakers

**InsideNGO** **Overhead Summit Funding to Support Scale and Results**  
**Summit III: Unraveling the Overhead Myth, Examining Solutions by Play**

**AICPA** American Institute of CPAs  
**Deconstructing the Overhead Myth: Using Financial Reporting**

**CIVIL SOCIETY** **Preventing death by starvation**

**Northwest global donors exchange**  
Full Funding for Results Series

### Events, Initiatives & Publications

**IMPACT EXCHANGE**

**GUIDESTAR**

**CHARITY NAVIGATOR**  
Your Guide To Intelligent Giving

**LEAP OF REASON**

**BBB** **Nonprofit Finance Fund**

**Community Wealth Partners**  
A Share Our Strength Organization

**The Bridgespan Group**

**ACT** **ALLIANCE FOR CHARITABLE TRUST**

**Alliance for Charitable Trust**

**CHARITY DEFENSE COUNCIL**

### Watchers & Helpers

TODAY

### Grantmakers

**San Diego Grantmakers** **Strengthening Philanthropy**

**FORD FOUNDATION**

**DONORS FORUM** **SOUTHERN CALIFORNIA GRANTMAKERS** **NCG** **NORTHERN CALIFORNIA GRANTMAKERS** **INSPIRATION COMMUNITY LEADERSHIP**

**Edna McConnell Clark FOUNDATION** **WEINGART FOUNDATION**

**THE CASE FOUNDATION** **geo** **GRANTMAKERS FOR EFFECTIVE ORGANIZATIONS** **SVP SEATTLE**

### Grant Receivers

**InsideNGO**  
Operational Excellence for Global Impact

**INDEPENDENT SECTOR**

**NATIONAL COUNCIL OF NONPROFITS**  
National voice. State Home local impact.

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# GuideStar Nonprofit Profile

Pro Search Tools ▾

GuideStar Pro Search



★  
SAVE FOR LATER

📄  
DOWNLOAD DATA

📄  
PDF

🔗  
SHARE

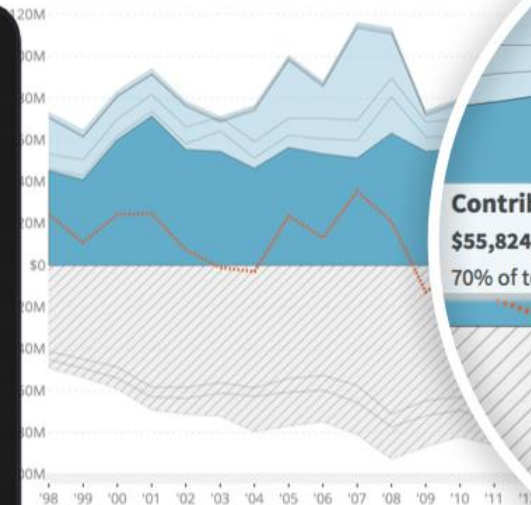
## Revenue vs. Expenses

Comparing revenue to expenses shows how the organizations finances fluctuate over time.

National Audubon Society, Inc.

Source: IRS Form 990

### Summary



### Total Revenue:

Contributions:	\$55,824,204
Gov't Grants:	\$5,540,000
Program Services:	\$8,288,000
Investments:	\$7,974,500
Special Events:	-\$17,880
Sales:	\$1,235,336
Other:	\$1,214,474

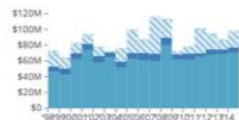
### Total Expenses: \$81,898

Program Services:	\$62,900
Administration:	\$6,000
Fundraising:	\$12,998

### Funding Sources

The funding sources breakdown shows the funding categories upon which a nonprofit organization relies over time.

Source: IRS Form 990



### Assets & Liabilities

The comparison of assets to liabilities shows the relationship between what an organization owns and what it owes.

Source: IRS Form 990



### Financial Data



# Four Levels of Participation



8,258 organizations



16,647 organizations



8,187 organizations



*Coming soon*

Bronze	Silver	Gold	Platinum
Contact Info	Audited Financial Statement <b>OR</b>	Long term Goals	Quantitative Programmatic Metrics
Mission Statement	Fiscal Year	Strategies	Narrative to explain your metrics
Area Served	Revenue Sources	Core Competencies	
Keywords	Expenses	Indicators	
CEO Info	Liabilities	Progress in reaching goals	
Board Info	Assets		
Lists of Programs			

# 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





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## Audience Questions



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