NONPROFIT LEADERSHIP CENTER

Better Data, Better Decisions: How to Get Your Nonprofit Organized

Leila Martini, DrPH, MLS, MPH, UXC, CKM
Olive Branch Research, LLC

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Research | Strategy | Solutions

Learning Objectives

Explain the difference between data, information, and knowledge, and describe why data governance and data quality are essential for nonprofits.

Identify common data and document management challenges and understand how these issues impact staff time, productivity, and organizational risk.

Apply practical, low-lift strategies to improve how data and documents are organized, trusted, and used across their organization.

The Challenge

The Challenge: Knowledge Chaos

Organizations sit on mountains of data — but much of it is redundant, outdated, or trapped in silos.

Staff spend 30–40% of their time searching or recreating information. (McKinsey)

Without strong knowledge systems, staff (and AI) produce unreliable or biased outputs.

Result: Wasted time, lost insights, missed opportunities.

Use Case: Retirement

Scenario:
Maria leads a fast-moving global advocacy team. She has been with the organization for 20 years and is getting ready to retire.

The Challenge:
When staff leave, months or years of expertise walk out the door. Maria will be taking critical knowledge assets with her (knowledge lives in people's heads, not in systems).

The Impact:
New team members spend weeks trying to figure out who knows what, where things live, and how work gets done.

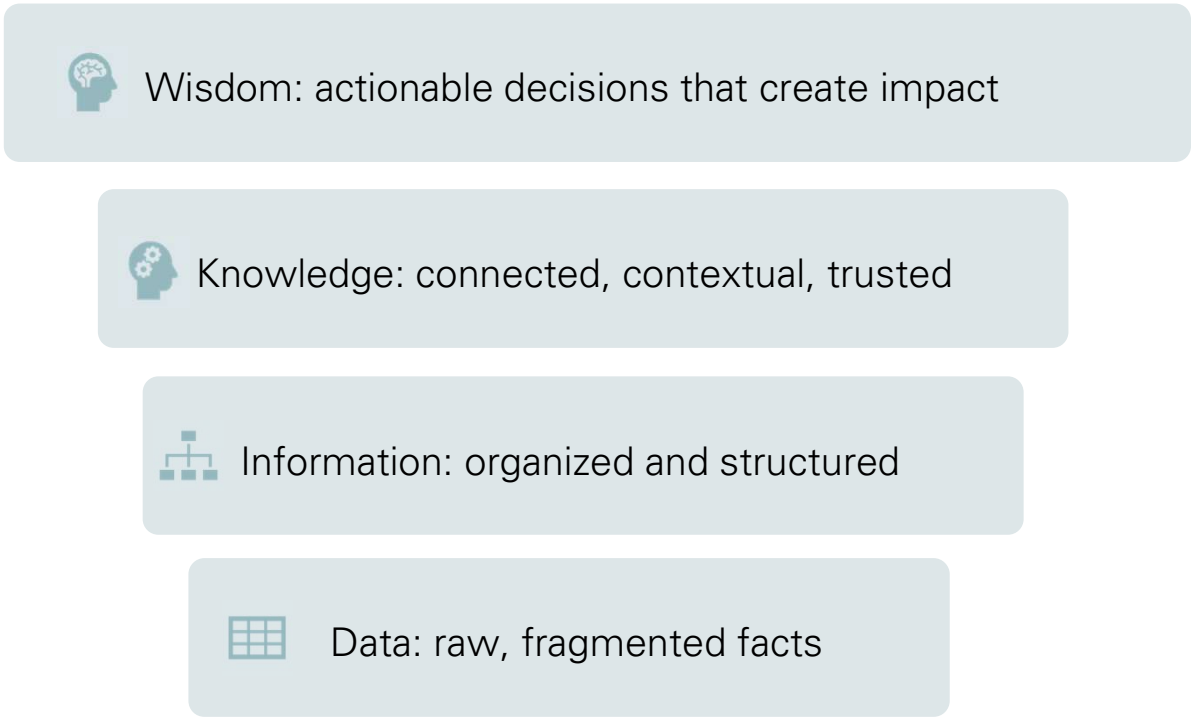
Use Case: Disorganized Files

Scenario: Sarah's team has thousands of files across SharePoint, Google Drive, and Box. Content is duplicated, outdated, mislabeled, and spread across multiple platforms.

Challenge: Sarah wants to use AI to surface insights and improve coordination — but unorganized, inconsistent, and stale content makes AI unreliable.

Impact: Staff spend hours searching — or worse, recreating work that already exists.

DIKW Journey*



*Olive Branch Research, LLC helps guide businesses along the DIKW journey.

Data: The Foundation

Data are raw facts — names, dates, donation amounts, service counts, demographics, survey responses.

For nonprofits, data:

- Tracks how many people you serve
- Records donations and financial transactions
- Documents services delivered
- Captures outcomes and metrics required by funders
- Supports compliance and audits

Without accurate data, everything built on top of it becomes unreliable.

Information: Data That Is Organized and Given Context

Information is data that has been organized and given meaning — reports, dashboards, charts, summaries.

For nonprofits, information:

- Shows trends (e.g., monthly clients served)
- Supports grant reporting
- Demonstrates program outcomes
- Informs board presentations
- Identifies gaps or service needs

Information turns raw numbers into something usable and understandable.

Knowledge: Understanding Patterns and Meaning

Knowledge is what you learn when you analyze information over time and connect it to goals, operations, and context. Knowledge answers *why it's happening* and *what it means*.

For nonprofits, knowledge helps you:

- Understand what's driving demand (seasonality, policy changes, referral sources)
- Identify what's working and what isn't across programs
- Recognize where processes are breaking down (intake delays, referral gaps)
- Build institutional memory (so insights don't disappear when staff leave)

Knowledge is "how we **understand** our world" based on **evidence** and **experience**.

Wisdom: Making Smart Decisions

Wisdom is the ability to use knowledge to make sound, ethical, and mission-aligned decisions — especially when facing constraints, tradeoffs, or uncertainty.

It answers the question: Given what we know, what should we do?

- For nonprofits, wisdom shows up when you:
  - Decide how to allocate limited funding across programs
  - Choose which services to expand, redesign, or sunset
  - Make strategic planning decisions grounded in evidence
  - Adopt AI or automation responsibly

Wisdom is where **evidence meets judgment, ethics, and mission**.

Why All Four Are Essential

If data are messy, your information will be flawed.

If information is fragmented, you won't develop reliable knowledge.

If knowledge isn't shared or documented, you can't build wisdom consistently—and decisions become reactive.

Strong data and information governance protects this entire pipeline so nonprofits can make decisions that are accurate, equitable, defensible, and mission-aligned.

What is Governance?

- In the context of data and information, governance is the system of roles, rules, processes, and accountability that ensures data is managed consistently, responsibly, and in alignment with the organization's mission.
- It answers questions like:
  - Who owns this data?
  - Who is allowed to access it?
  - How should it be entered and stored?
  - What standards must be followed?
  - How long do we keep it?
  - What happens when something goes wrong?
- Governance is not a tool. It is not software. It is a decision-making structure.

DATA QUALITY

6 Dimensions of Data Quality

Accuracy

- The data correctly represents real-world facts or events.
- *Example: A client's birthdate is recorded correctly in every system.*

Completeness

- All necessary information is present.
- *Example: A contact record has name, phone, email, and country — not just a name.*

Consistency

- Data is the same across systems and doesn't conflict.
- *Example: "Florida Department of Health" isn't spelled five different ways in five different databases.*

6 Dimensions of Data Quality (Continued)

Timeliness

- Data is up to date and reflects the most recent information available.
- *Example: Staff lists or project statuses are current, not from last year.*

Validity (Conformance to Standards)

- Data follows the agreed-upon rules or formats.
- *Example: Dates are all in the same format (MM/DD/YYYY), country codes follow ISO standards, etc.*

Uniqueness (No Duplicates)

- Each record is unique; duplicates have been removed or merged.
- *Example: "John Lopez" doesn't appear three times in the donor list*

Why Data Quality Matters

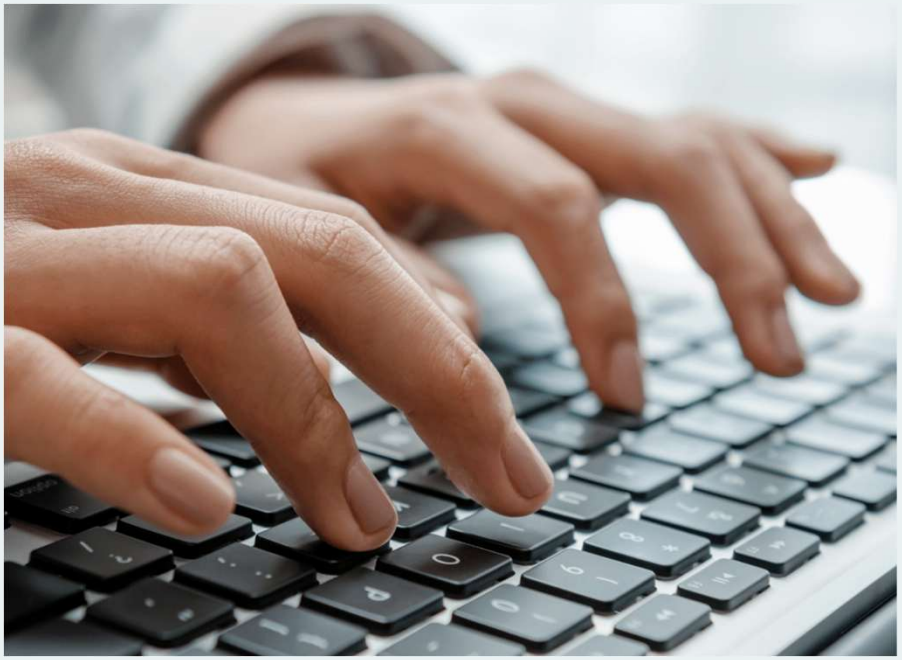
- Poor-quality data leads to bad decisions, wasted time, and lost trust.

- High-quality data makes it easier to:
  - Run accurate reports
  - Share information between teams
  - Train reliable AI systems
  - Deliver consistent communication to stakeholders

COMMON DIKW CHALLENGES

DIKW Challenges: Inconsistent Data Entry

Inconsistent Data Entry



Problem

- No required fields
- Different naming conventions

Impact

- “Dirty” data
- Inaccurate reporting
- Time-consuming cleanup
- Frustration across teams

Inconsistent Data Entry Solutions

Create Data Entry Standards- Define required fields and acceptable values.

Develop a Data Dictionary- Define what each field means and how it should be used.

Train Staff Regularly- Short refreshers reduce drift.

Monitor Quality Monthly or Quarterly- Run simple reports to check completeness and duplicates.

DIKW Challenges: Knowledge Loss

Knowledge Loss

Problem

- Staff leave positions either because of retirement, finding another role, etc.

Impact

- Repeated mistakes & slowed decision-making
- 20–30% of critical knowledge lost when staff leave

Knowledge Retention Solutions

Solution

- Knowledge Retention: Knowledge retention is the deliberate process of capturing, preserving, and transferring critical organizational knowledge so it is not lost when staff leave, roles change, or systems evolve.

- Knowledge Retention safeguards continuity, reduces risk, strengthens culture.

- Capture and document critical knowledge from staff and projects, organize it, and make it easy for others to find and use — so important information doesn't get lost when people leave or roles change.

DIKW Challenges: Data Silos

Data Silos

Problem

- Data stored across CRM, spreadsheets, shared drives, email
- No shared definitions or integration

Impact

- Conflicting Reports
- Manual Reconciliation
- Lost Staff Time
- Reduced Trust in Data

Data Silo Solutions

Create a Data Map - Document where key data lives and identify the "system of record" for each dataset.

Define a Single Source of Truth- Clarify which system is authoritative for donors, clients, programs, etc.

Reduce Shadow Systems- Migrate critical spreadsheets into governed platforms when possible.

Assign Data Owners- Every major dataset should have a responsible owner.

DIKW Challenges: Redundant, Outdated Trivial Content

Redundant, Outdated, Trivial (ROT) Documents/Content

Problem

- No version control standards
- No archive or retention process
- Old content never reviewed or retired
- Multiple versions of the same file saved in different locations
- “Final_v3_revised_final2” naming confusion

Impact

- Outdated policies used in grant submissions or public materials
- Incorrect data pulled from older versions of reports
- Compliance exposure during audits
- Sensitive documents stored improperly
- Reputational damage from inconsistent information

ROT Solutions

1. Establish Version Control Standards

- Enable version history in shared platforms
- Prohibit storing critical final documents on personal drives

2. Standardize File Naming Conventions

Example format:
YYYY-MM-DocumentName_Version_Status

Example:
2024-03-AnnualReport_v1_Draft

ROT Solutions (Continued)

3. Define a Single Source of Truth

- Identify official repositories for final documents
- Eliminate duplicate “final” folders
- Communicate clearly to staff

4. Implement Retention & Archiving Policies

- Define how long documents should be kept
- Separate active files from archived materials
- Conduct annual cleanup reviews

ROT Solutions (Continued)

5. Assign Content Owners

- Someone accountable for reviewing and updating key folders
- Schedule periodic ROT audits (quarterly or annually)

6. Use Metadata When Possible

- Tag documents as Draft / Final / Archived
- Include program, year, and grant cycle
- Improve search and filtering

What Is Metadata?

- Metadata is a label that helps you understand, find, organize, or manage something.

Example: If you track services delivered, metadata might include:

  - Program category (Behavioral Health, Housing, Food Security)
  - Funding source
  - Service type (Counseling, Referral, Case Management)
  - Delivery channel (In-person, Virtual, Phone)
  - Outcome type

This allows you to analyze impact by category or funding stream.

Use Cases Revisited

Use Case 1: Retirement

Scenario:
Maria leads a fast-moving global advocacy team. She has been with the organization for 20 years and is getting ready to retire

Challenge:
When staff leave, months or years of expertise walk out the door. Maria will be taking critical knowledge assets with her (knowledge lives in people's heads, not in systems).

Solution:
Olive Branch Research provides knowledge retention services to help the team Maria is leaving behind by capturing and documenting the knowledge currently stored in her head, so work does not have to be duplicated.

Use Case 2: Disorganized Files

Scenario: Sarah's team has thousands of files across SharePoint, Google Drive, and Box. Content is duplicated, outdated, mislabeled, and spread across multiple platforms.

Challenge: Sarah wants to use AI to surface insights and improve coordination — but unorganized, inconsistent, and stale content makes AI unreliable.

Solution: Olive Branch Research helps Sarah by cleaning, organizing, and structuring her content, removing redundant and outdated files, and creating a clear system so her information — and future AI tools — can finally work together.

Case Study

Case Study: Large Nonprofit

Challenge

- Rapid global growth created knowledge silos, inconsistent onboarding, and lost institutional knowledge.
- Critical knowledge lived in people's heads — not systems.
- SharePoint, Google Drive, and email were used inconsistently, leading to inefficiency and duplication.
- Meetings replaced documentation, making information hard to retrieve.

Approach

- Conducted 31 stakeholder interviews and a KM Strategic Planning Canvas.
- Mapped knowledge flows, pain points, and redundancies.
- Benchmarked against ISO 30401 Knowledge Management Standard.
- Designed a KM roadmap and retention model.

Case Study (Continued)

Solutions

- Knowledge Retention Framework to capture and preserve key expertise.
- Finance Knowledge Library for policies, templates, and budget rationales.
- A standardized onboarding and documentation processes across departments.
- SharePoint restructuring, ROT reduction, and meeting-to-documentation workflows.

Impact

- Established the first organization-wide KM definition and governance model.
- Improved efficiency, transparency, and knowledge access.
- Enabled better onboarding and prepared data for future AI-readiness.
- Designed a KM roadmap and retention model.

Q & A

Q & A

Q1. What's the very first step for a nonprofit with no data governance?

A: Start by creating a governance plan and documenting your "single source of truth" for key data: donors, clients, volunteers, and programs. Then assign an owner to each dataset.

Q2. How do we reduce duplicates in our database?

A:

- Establish data entry rules
- Require email or phone as a unique identifier
- Clean quarterly

Q& A Continued

Q3. Do we need a full-time data person?

A: No. Many nonprofits manage governance with a cross-functional data team meeting monthly: Development, Programs, IT, and Communications. Or hire a fractional Knowledge Officer (like Olive Branch Research, LLC).

Q4. How often should we check data quality?

A:

- High-volume data: monthly
- Medium-volume: quarterly
- Annual audits for everything else

Q & A Continued

Q5. What is the difference between data governance and IT?

A:

- IT maintains systems, security, access
- Governance defines the rules for how data should be entered, organized, and used
- IT supports governance; IT does not replace it

Q & A Continued

Q6. How do we get staff to follow standards?

A:

- Keep standards simple
- Train with real-life nonprofit examples
- Provide templates and quick guides
- Recognize people who follow the rules
- Reduce manual work (automate validation)

Q & A Continued

Q7. What if we have too many systems?

A: Create a system-of-record map documenting what data lives where and which one is authoritative. This alone reduces confusion by 50%.

Q8. How long should we keep client or donor files?

A: Follow:

- Grant requirements
- IRS rules
- Privacy regulations
- Organizational retention policy
- Most nonprofits follow 3–7 years for many categories, but sensitive client data may be shorter

Your Questions

Next Steps

- Schedule a discovery session
- Olive Branch Research, LLC at 813-494-8561
- Website: https://olivebranchresearchllc.com/
- Email: martiniolivebranch@gmail.com

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Leila Martini, DrPH, MLS, MPH, UXC, CKM
Martiniolivebranch@gmail.com
https://olivebranchresearchllc.com/

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