



*We'll get you there.*

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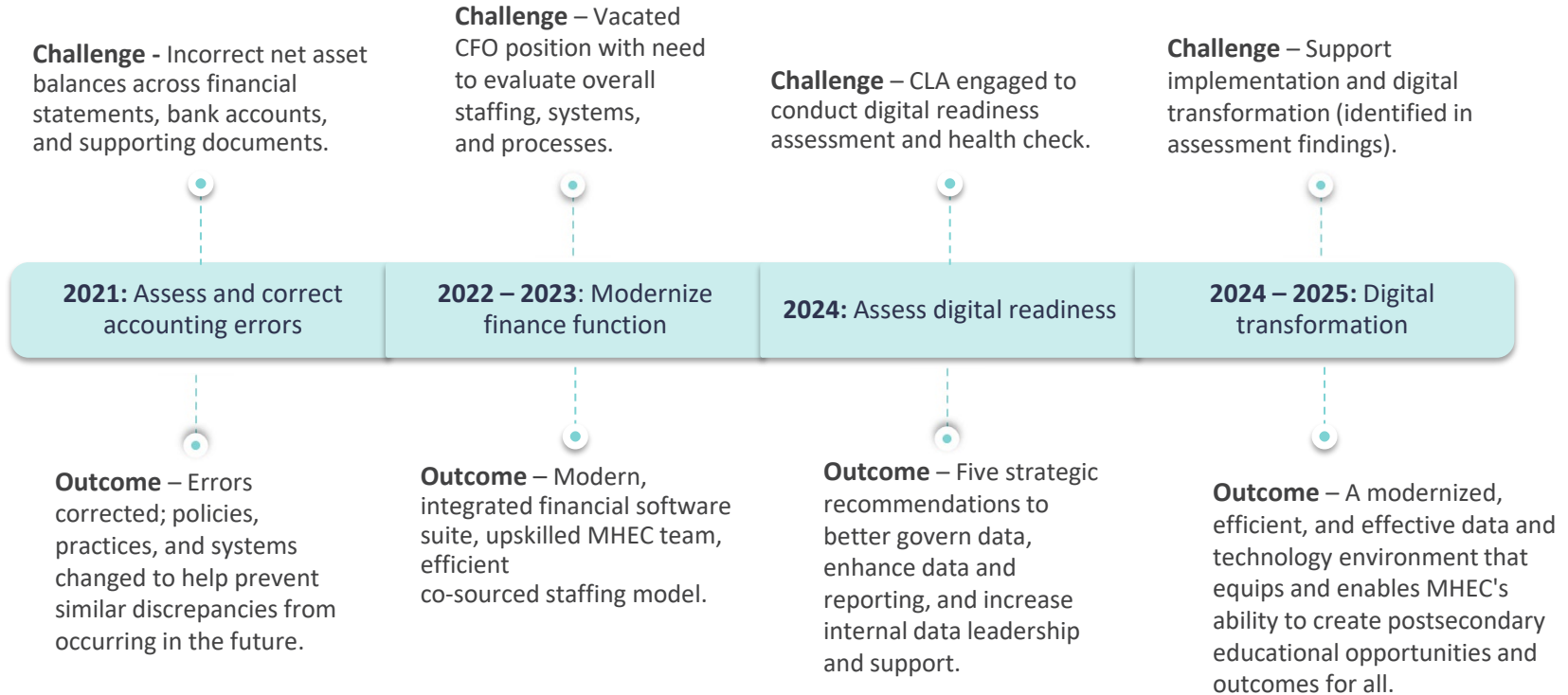


# MHEC Analytics and Management

Digital Modernization Overview

Presented by CLA (CliftonLarsonAllen LLP)

# MHEC + CLA Journey



# The Starting Point: Digital Readiness Assessment



# Key Themes Derived From Discovery

## Challenged sources of truth

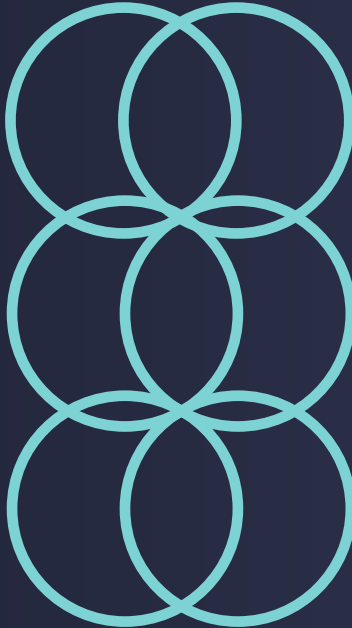
- Data silos and duplication, in small scale, exist.
- These challenge confidence in the data, systems, and reporting in various departments, resulting in separate, manual reporting.

## Reporting and adoption varies by team

- Power BI reports not fully meeting needs and outcomes.
- Variation across MHEC exists re: technology maturity, accuracy, and fit; this impacts adoption and can impact data efficiency.

## Complex data and reporting needs

- Current Tableau and Power BI dashboards have complex data collection for the critical reporting needs.



## Manually intensive processes

- Critical, departmental functions and activities are manually orchestrated (e.g., cost savings, state insights).
- This impacts ability for those roles to focus on more valuable knowledge work

## Challenged CRM

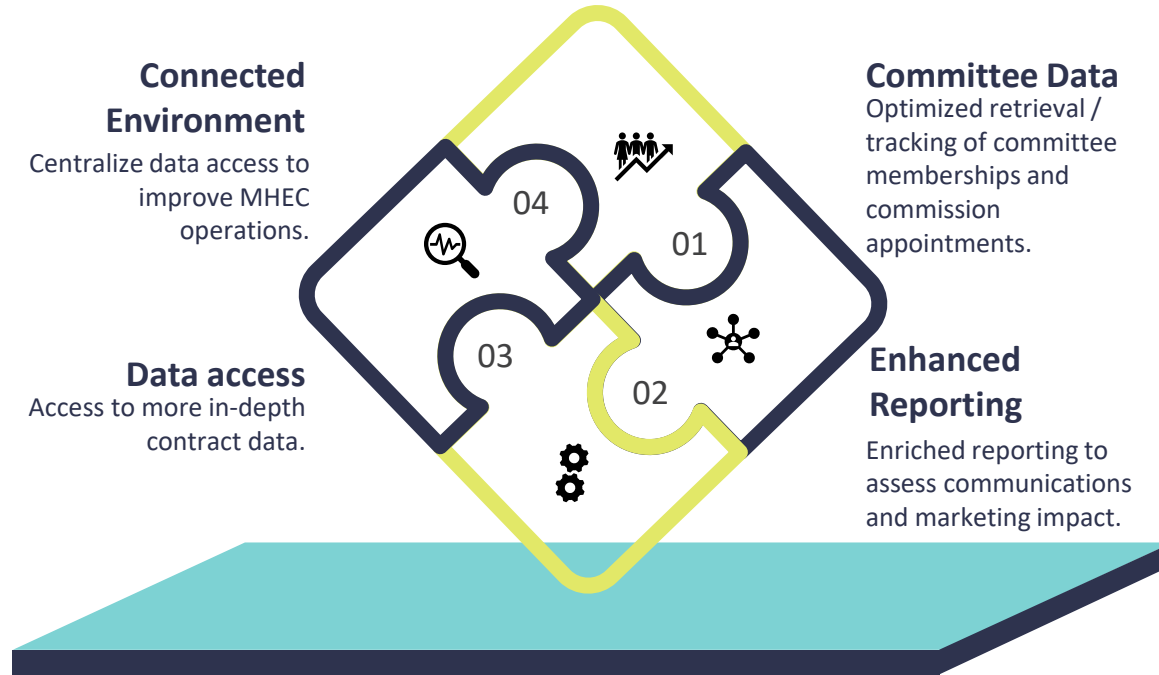
- Limited use, varied adoption, application configuration, and data retention (e.g., retaining historical info) challenges.

## Lack of data governance

- No clearly defined or mandated technology governance, standards, or use (e.g., one Macbook in use, others using PCs; variation in tool/platform use — Tableau vs. Smartsheet vs. Power BI).



# MHEC Strategic Outcomes



# The Journey Ahead



**1. Data governance**  
12 weeks:  
Low engagement



**2. Data warehouse**  
16 weeks:  
Moderate engagement



**3. Reporting**  
8 – 10 weeks:  
Moderate engagement



**4. CRM**  
8 – 10 weeks:  
Moderate engagement



**5. Increase data leadership**  
12 – 16 weeks:  
Low engagement

**Low:** ~ 1 – 4 hours/week    **Moderate:** ~ 5 – 12 hours/week    **High:** ~ 13+ hours/ week



# Alignment to MHEC Priorities



## Connected environment

**Recommendations:** Data warehouse, reporting



## Data access

**Recommendations:** Data warehouse, reporting and data governance, increased data leadership



## Committee data

**Recommendations:** Data governance, CRM



## Reporting

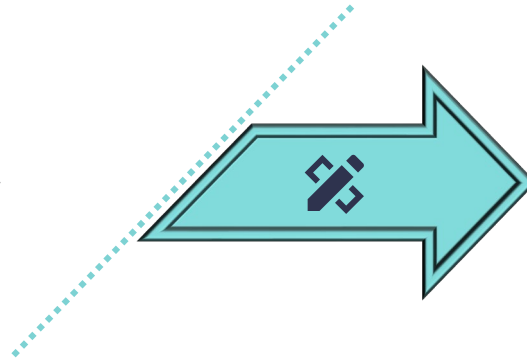
**Recommendations:** Data governance, data warehouse, reporting

# Status



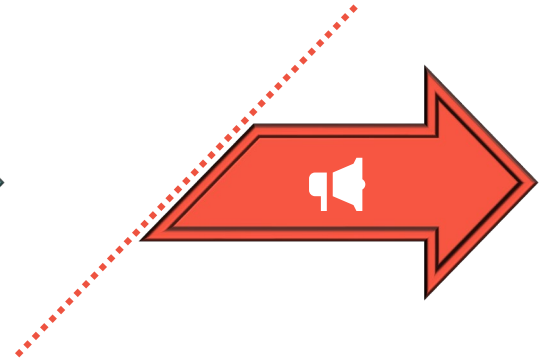
## Kick-off

- CRM, Data Warehouse, Reporting and Data Governance workstreams started



## Data collection started

- Data collection for CRM optimization and data governance engagements in progress
- CRM user security analysis in progress



## Data source rationalization

- Preliminary data source rationalization in progress





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# CLA Nonprofit Survey Responses

50%

of nonprofit respondents' main goal is improving operational efficiency

49%

of nonprofit respondents' primary challenge is the management and use of fragmented systems and spreadsheets

67%

of nonprofit respondents' say their data integration/centralized system use is "moderate"

65%

of nonprofit respondents' use "basic" analytic tools for reporting

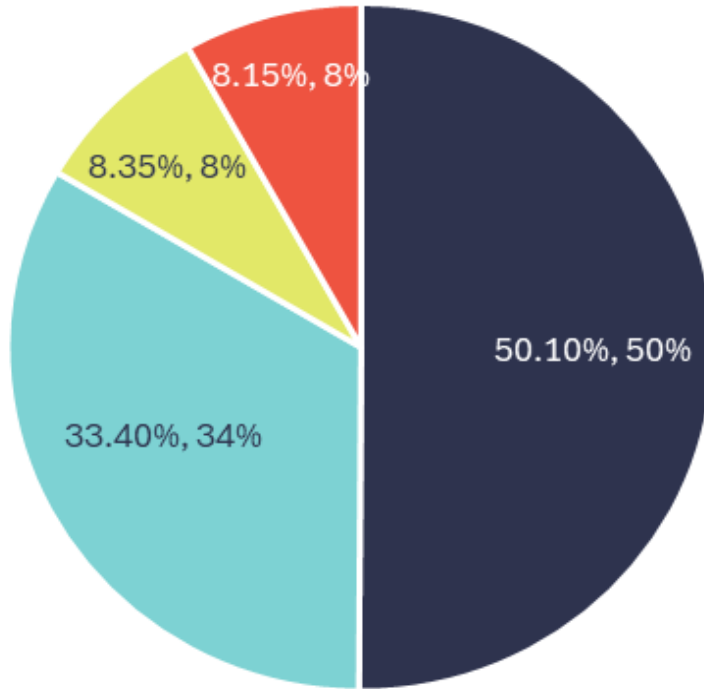
43%

of nonprofit respondents' say data analysis/reporting is their top opportunity for streamlining



# Main Goal for Enhancing Analytical Capabilities

*503 respondents*

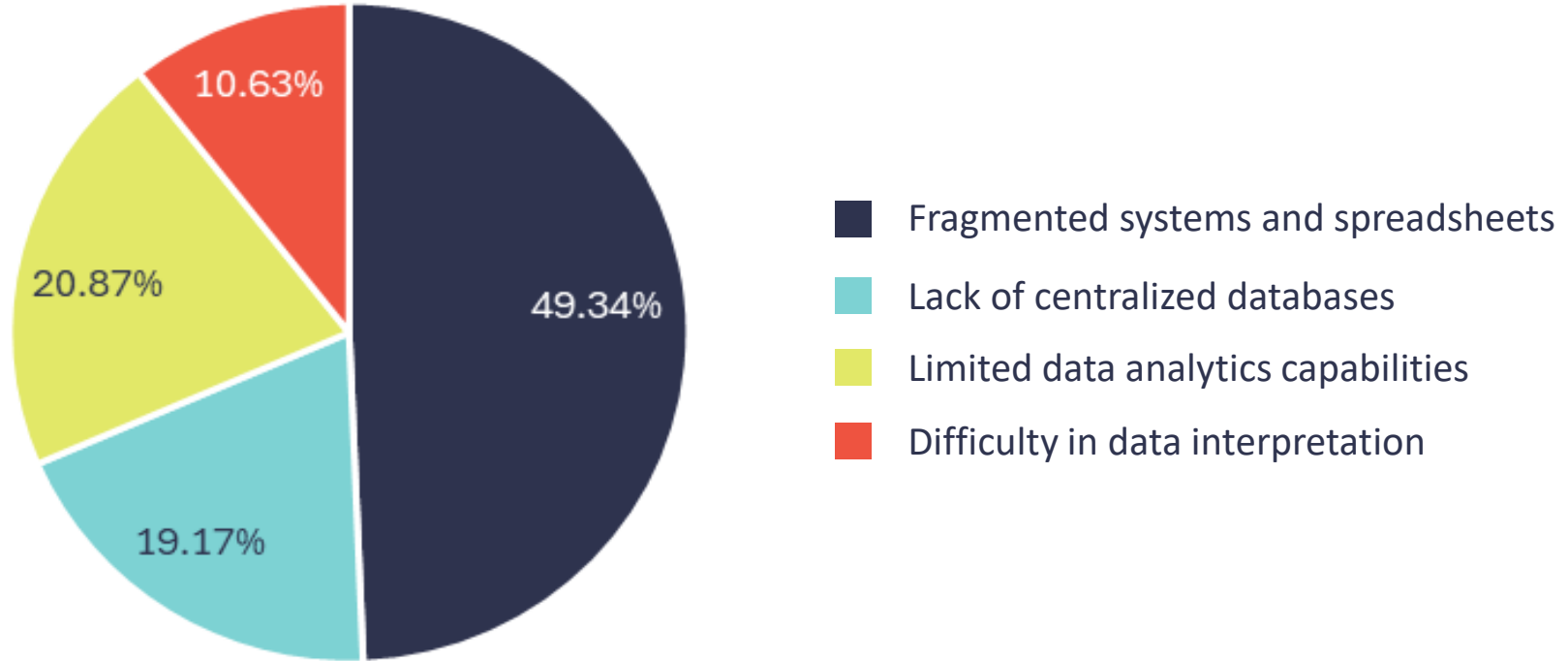


- Improving operational efficiency
- Enhancing strategic decision-making
- Increasing fundraising effectiveness
- Gaining deeper stakeholder insights



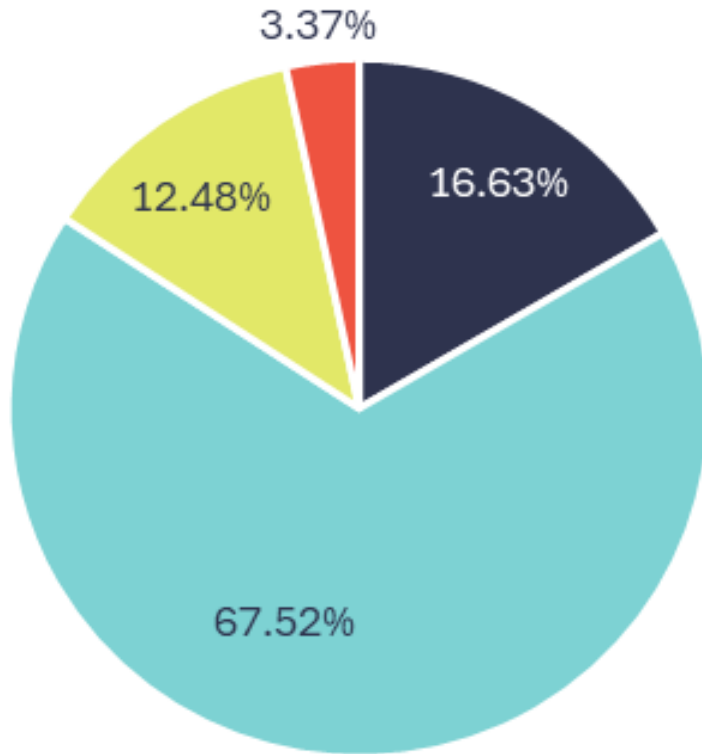
# What are the primary challenges your nonprofit faces with its current data management practices?

*527 respondents*



# How would you rate your organization's current level of data integration and centralized system usage?

*505 respondents*

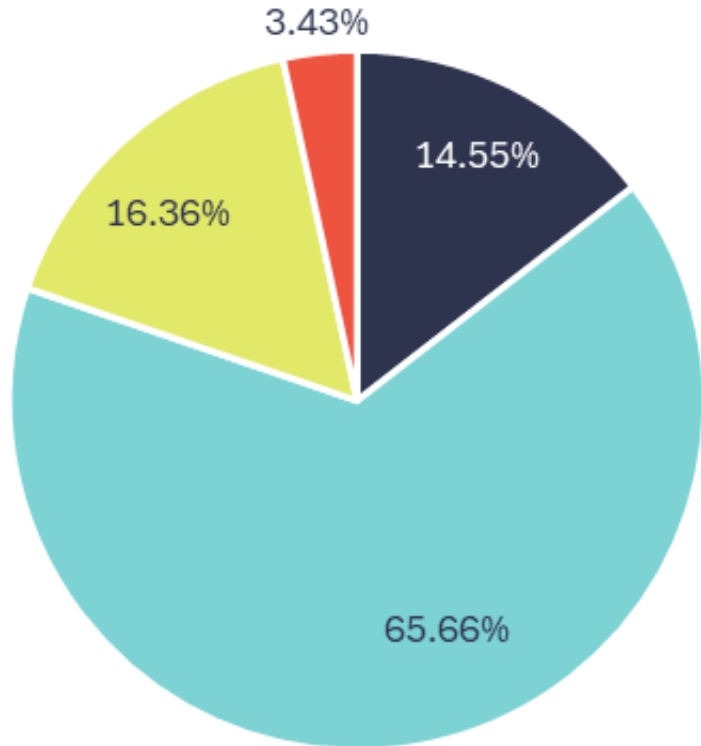


- Very low – we rely heavily on fragmented systems
- Moderate – we have some centralized systems but still face challenges
- High – we use integrated and centralized systems effectively
- Excellent – we have advanced, well-integrated systems



# What types of advanced analytics tools are you currently using or considering?

*495 respondents*



- None – we do not use advanced analytics tools
- Basic tools – we use some basic analytics tools for reporting
- Advanced tools – we use or are considering advanced analytics tools like predictive modeling or machine learning
- Comprehensive analytics suite – we use a variety of advanced tools and predictive models



# Which area of your data processes would benefit most from streamlining?

*527 respondents*

