



We'll get you there.

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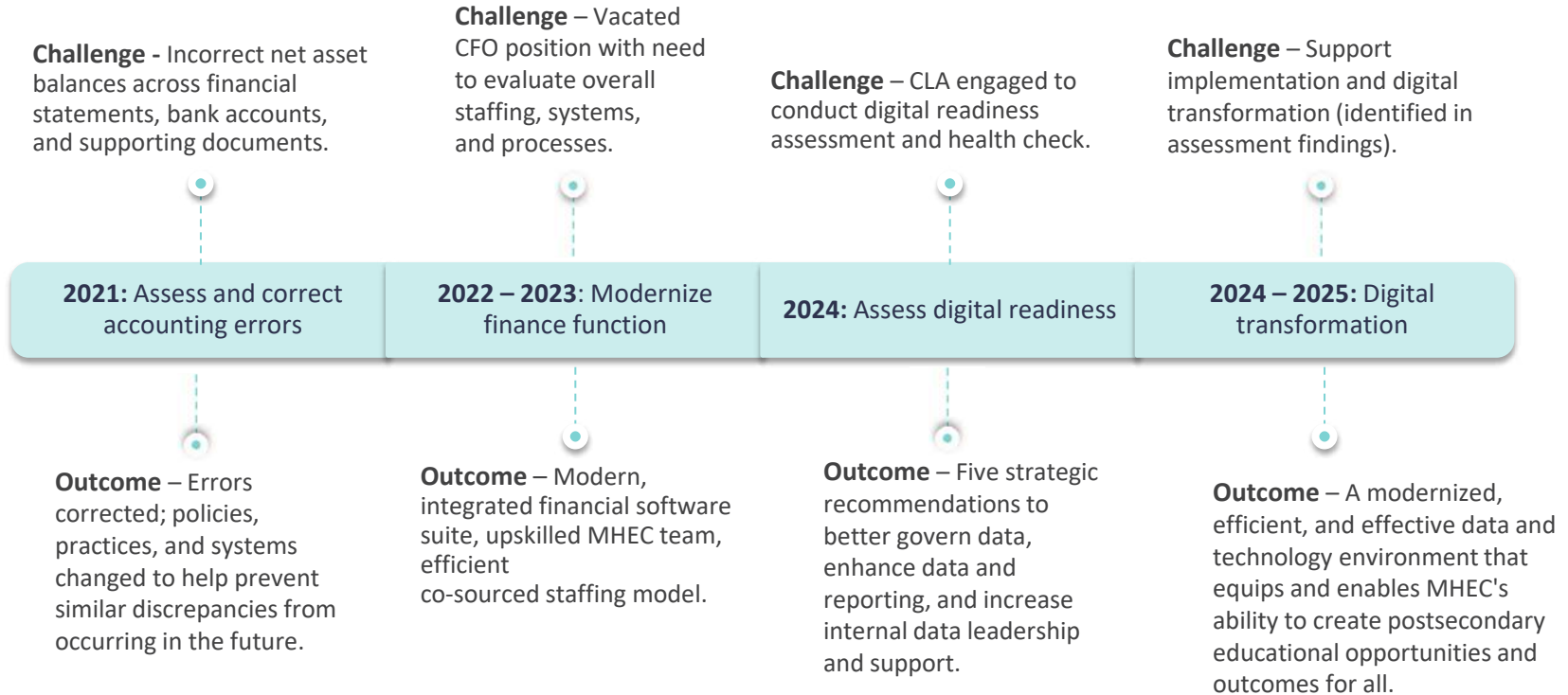


MHEC Analytics and Management

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

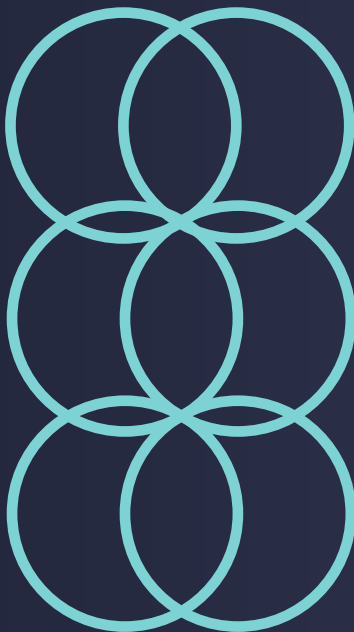
- Data silos and duplication, in small scale, exist.
- These challenge confidence in the data, systems, and reporting in various departments, resulting in separate, manual reporting.

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

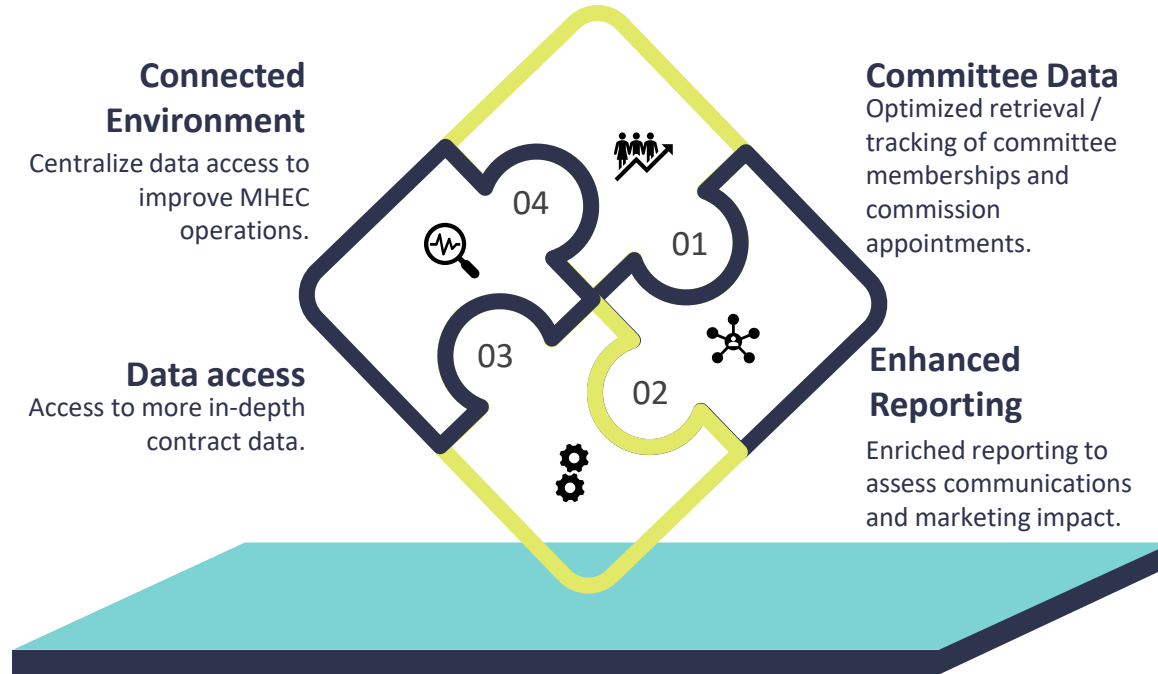
Challenged CRM

- 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

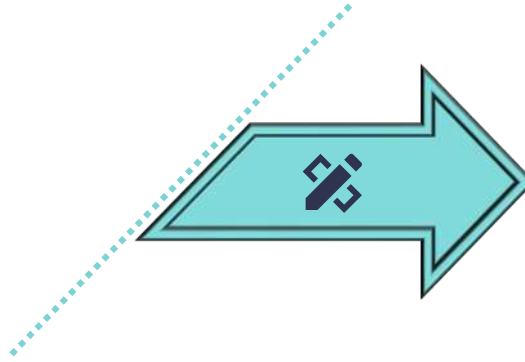


Status



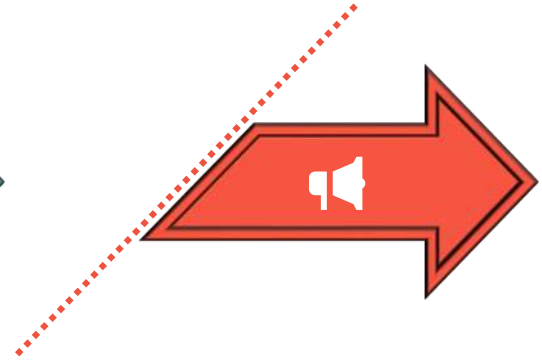
Kick-off

- 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

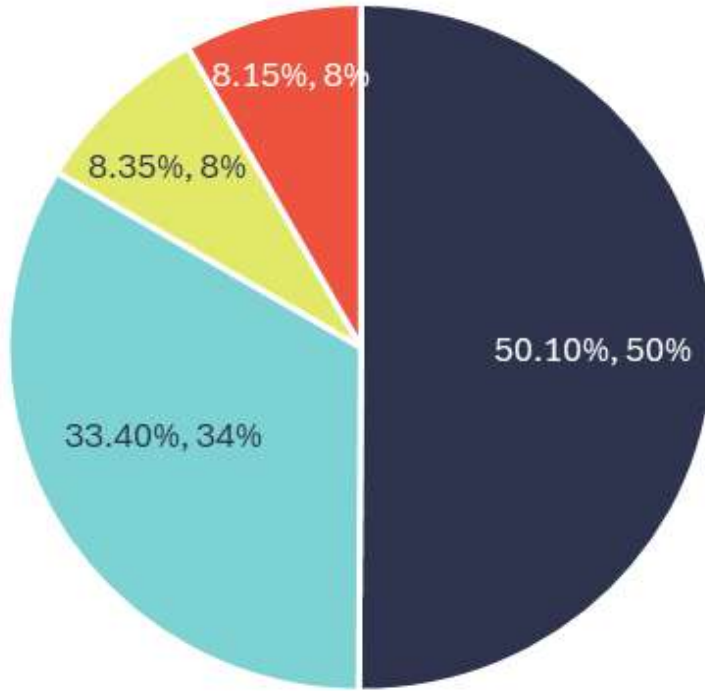
43%

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



Main Goal for Enhancing Analytical Capabilities

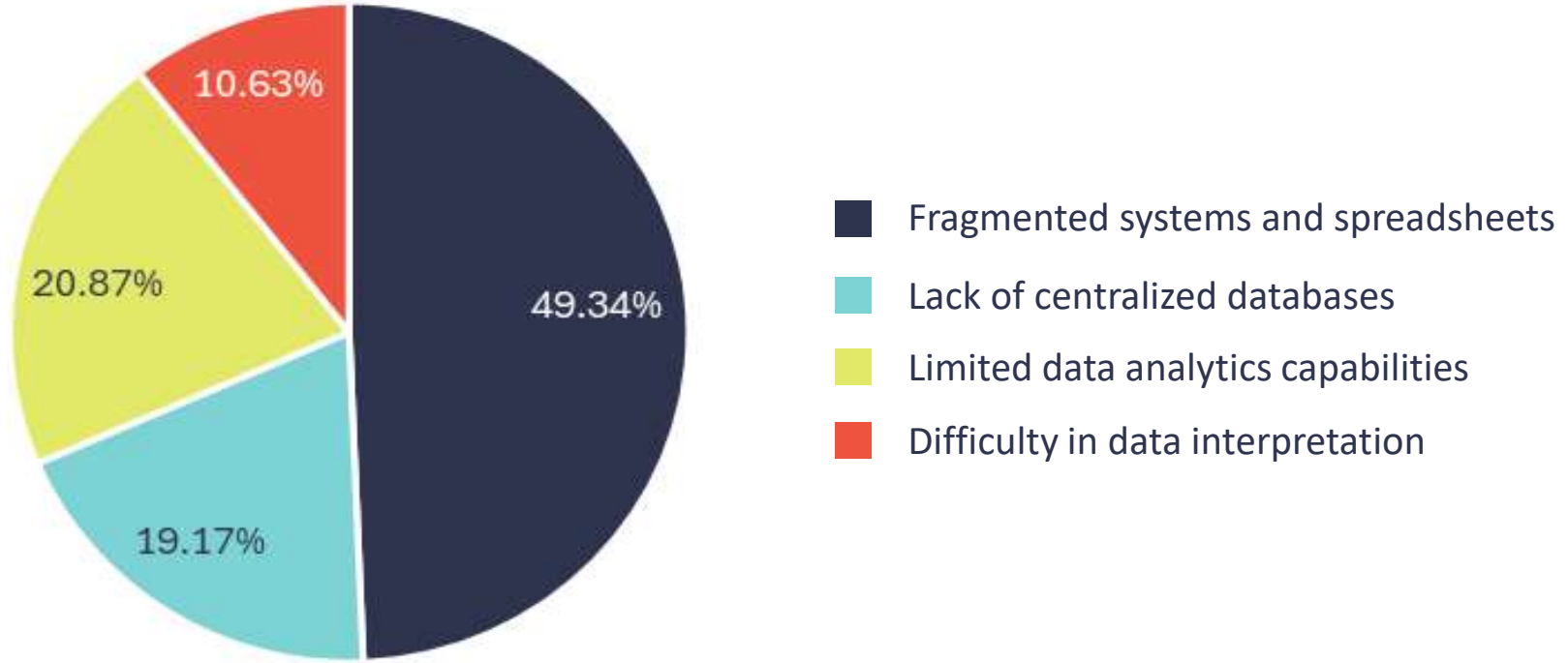
503 respondents



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

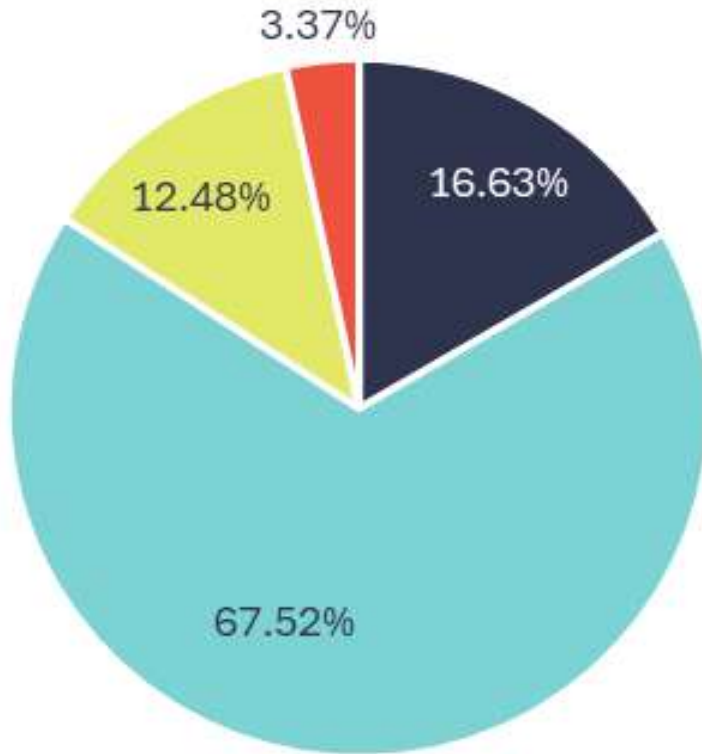
What are the primary challenges your nonprofit faces with its current data management practices?

527 respondents



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

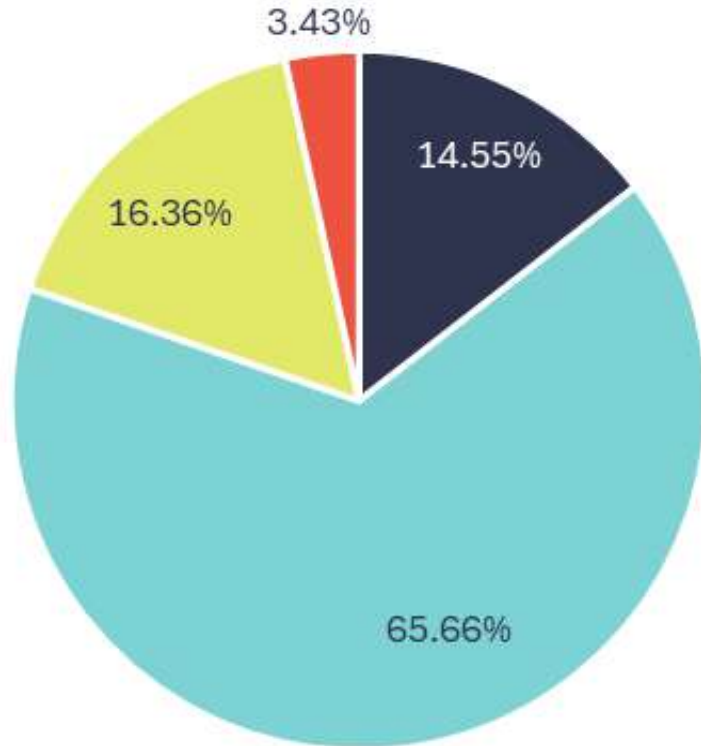
505 respondents



- 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

