



# How Microsoft is Aligning to IATI

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# Technology for Social Impact

Tech for Social Impact empowers nonprofit and humanitarian organizations to advance their missions through the power of technology



# Breadth of Our Commitment

## Data & Advanced Analytics

Amnesty International | Oxfam International

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## Infrastructure & Security

iRespond | ID2020

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## Productivity & Collaboration

Operation Smile | SERP

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## Constituent Management & Operations

Team Rubicon | Danish Refugee Council





# Top Scenarios for Nonprofits

Nonprofit		Foundations		UN	
<b>Engage Donors, Volunteers, and Beneficiaries</b>					
Fundraising research and analysis	Constituent and donor management	Campaign management	Event management	Volunteer management	Beneficiary management
<b>Optimize Operations</b>					
Finance, budget and accounting	Workforce management	Project management	IT operations	Grant, award, and contract management	Logistics and supply chain
<b>Innovate for Impact</b>					
Strategic planning	Program planning	Monitoring and evaluation	Insights and analytics	Mobile data connection	Policy and advocacy
<b>Empower Employees</b>					
Access to data	Collaboration	User productivity	Mobile workforce	Knowledge management	Accessibility
<b>Support Beneficiaries</b>					
Data privacy	Digital identity	Open and permissioned data	Data exchanges	Standards and policy	Distributed ledgers
<b>Security, Privacy, and Compliance</b>					
Security standards	Global auth. and SSO	Endpoint protection	GDPR	Awareness and assessment	Device management

# What have we heard...

Need **interoperability** across solutions

Need ways to better **measure impact**

Need **solutions** purpose-built for program delivery

Need to increase data **transparency**

Need to share **best practices** across the sector

Need a healthy partner **ecosystem**

Need solutions that are performant and **secure**

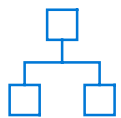


# Dynamics 365 Common Data Model for Nonprofits

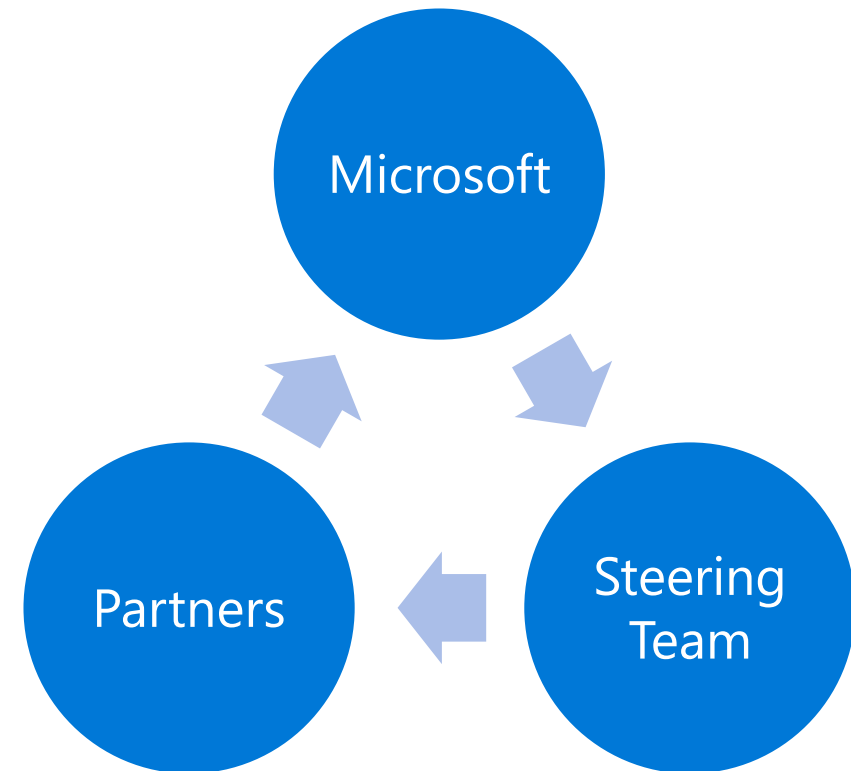
A Microsoft-led, purpose-built data schema published on GitHub encourages interoperability, best-practices, turnkey solutions, and deep analytics



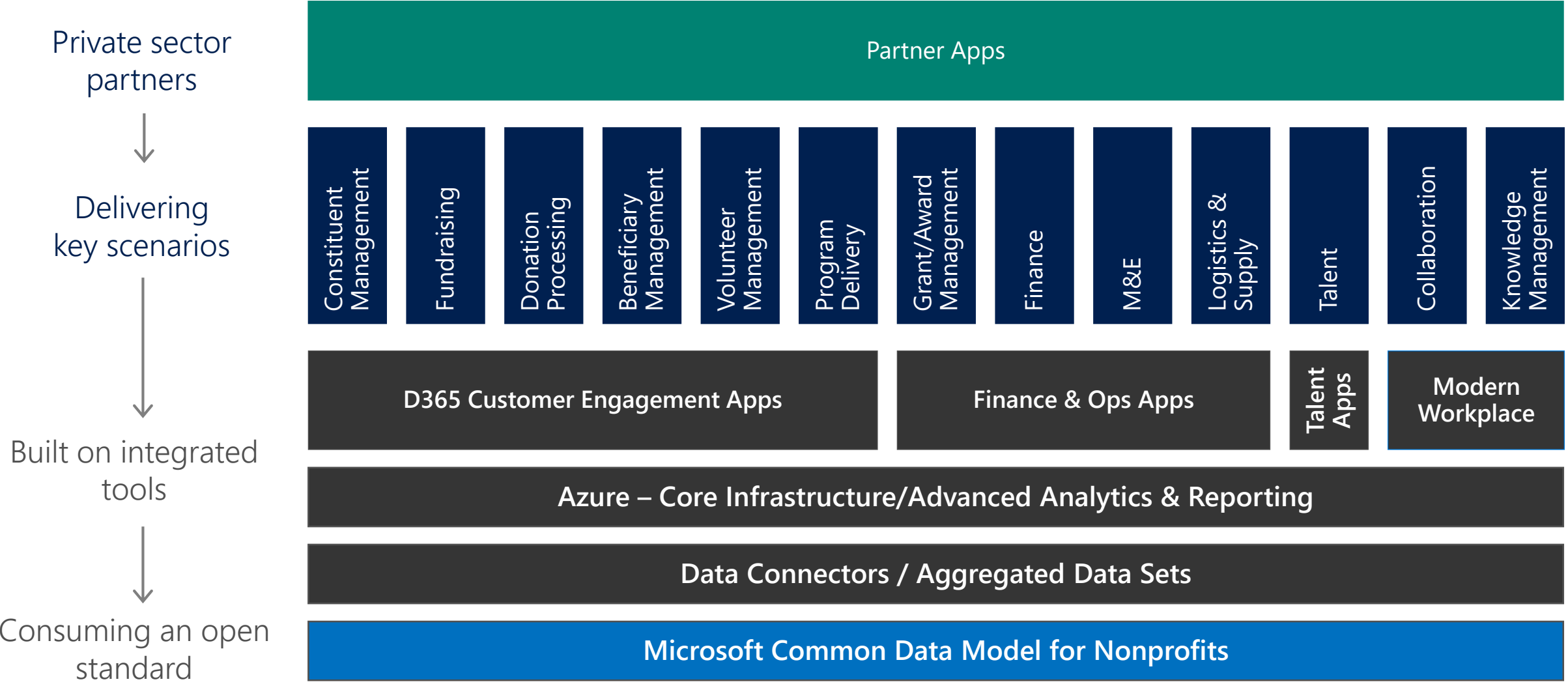
Thousands of nonprofits trust D365 to run their operations, yet we consistently hear that Microsoft can do more.



We are starting with the creation of reference models, accelerators, and a robust partner ecosystem.



# Nonprofit Accelerator Strategy





# Nonprofit Accelerator Partners



Nonprofit Accelerator

Sample Apps

Templates

Connectors

Common Data Model for Nonprofits

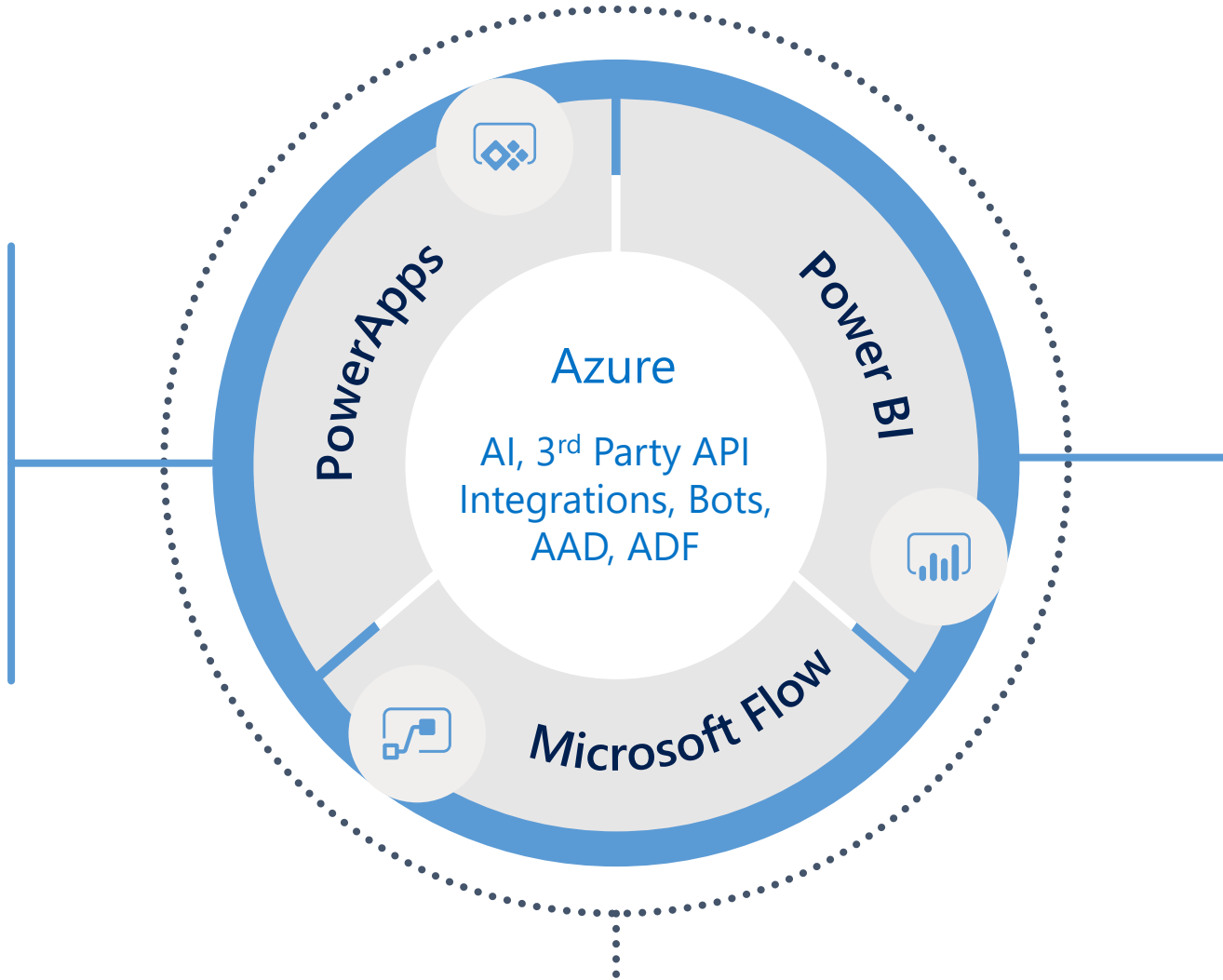
Microsoft Common Data Model

# Microsoft Platform

Dynamics 365

Office 365

Power Apps  
+ Insights + AI



# Nonprofit Accelerators

Application accelerators

Teams & Office 365  
integrations

Data connectors through  
the common data service

Common Data Model for Nonprofits

# Key Scenarios

Constituent Management		Donation Management		Grant and Award Management	
<b>Account Management</b>	360 degree view and tracking of constituent's data to include profile, relationships, and complete history of engagement with the organization involving donations, communications, marketing, grants, case management, etc.	<b>Donation Processing</b>	Acknowledgement of donation, tracking pledges and donations from individuals and institutions to include one-time and recurring donations, GIK, grant payments, and bequests, restricted and unrestricted tracking, call center support, revenue recognition in the accounting system of record	<b>Award Management</b>	360 degree view of the award details to include the proposal, proposal budget, award budget, resource plan, respond to requests from the donor, book the award, set up payment schedule & deliverables, expenditures, monitoring program outcomes, documentation, & communications
<b>Fundraising</b>		<b>Payment Integration</b>	Integration with payment processing platform for all types of donations	<b>Sub-recipient Management</b>	Tracking of sub-recipients/sub-awards to the grant to include budgets, objectives, activities, performance, etc.
<b>Campaign Management</b>	<ul style="list-style-type: none"> <li>Campaign creation—create campaign, identify goals, and track donations as a result of the campaign</li> </ul>	<b>Volunteer Management</b>		<b>Results Tracking</b>	Set performance measures against each objective & track progress throughout the life of the grant
<b>Multi-channel Marketing</b>	<ul style="list-style-type: none"> <li>Market campaigns and events through various channels—To include email, websites, and social media</li> <li>Personalized outreach—Automatic notifications, individual emails, print communications, mass mailings, and target groups</li> </ul>	<b>Volunteer Lifecycle Management</b>	<ul style="list-style-type: none"> <li>Volunteer strategy—Identify program volunteer needs to include skills, number of volunteers, and timing</li> <li>Recruit, onboard, train, &amp; offboard— Get qualified volunteers to help program, provide training &amp; certifications, and offboard when the volunteer leaves</li> <li>Plan—Organize volunteers with sign-ups, scheduling, and assignment</li> </ul>	<b>Beneficiary Management</b>	
<b>Program Delivery</b>		<b>Monitoring and Evaluation</b>		<b>Beneficiary Management</b>	360 degree view of the services that the beneficiary has utilized, relationships staff and donations
<b>Define &amp; Track Programs from Strategy to Execution</b>	<ul style="list-style-type: none"> <li>Define hierarchy of programs and projects and track activities, outputs, and outcomes to the programs and projects</li> </ul>	<b>Results Measurement</b>	Outcomes tracking, log frames, measuring program efficacy	<b>Case Management</b>	A goal-oriented process handling cases from opening to closure, coordinating services between an individual and a case manager, providing services to an individual by assessing the needs of the individual and when appropriate arranges, coordinates, monitors, and evaluates
<b>Service Delivery</b>	<ul style="list-style-type: none"> <li>Delivery of programmatic services directly to beneficiaries</li> </ul>	<b>Predictive Analysis</b>	Using AI/machine learning and data mining aggregate program and operational data to gain insights		

## Insights & Analytics

# Nonprofit End-to-End Capabilities

Constituent Management	Donation Management	Beneficiary Management	Finance
Account Management	Donation Processing	Individual Management	Revenue & fund management
Constituent Data Acquisition	Payment Integration	Case Management	Project account
Constituent Network	GIK Management	Beneficiary Experience	Service Billing
Membership Management	Corporate Giving	Sponsorship	Project Budgeting
Fundraising	Donor/Grantee Experience	Monitoring & Evaluation	Forecasting & Planning
Campaign Management	Grant/Award Management	Results Measurement	Tax Reporting
Event Management	Grant/Award Management	Predictive Analytics	Merchant & Payment Services
Multi-channel Marketing	Proposal Management	Knowledge Management	Human Resources
Program Management	Donor Compliance	Sourcing and Supply	Compensation & Benefits
Define & Track Programs from Strategy to Execution	Results Tracking	Logistics & Supply Chain	Payroll
Service Delivery	Sub-recipient Management	Procurement and Sourcing	Staff Portal
Advocacy Campaign Management	Volunteer management	Asset Management	Attract and Hiring
Project Planning & Delivery	Volunteer Lifecycle Management	Inventory Management	Performance & Feedback
	Volunteer Experience		Compliance & Workplace Safety
<b>Analytics and Reporting</b>			

# Microsoft Common Data Model for Nonprofits

- Built with nonprofits
- Incorporates best practices
- Results/outcome focused model
- Aligning to IATI standards
- Microsoft curated
- Sector governance
- Publicly available on Github

## Nonprofit CDM Entity Definitions

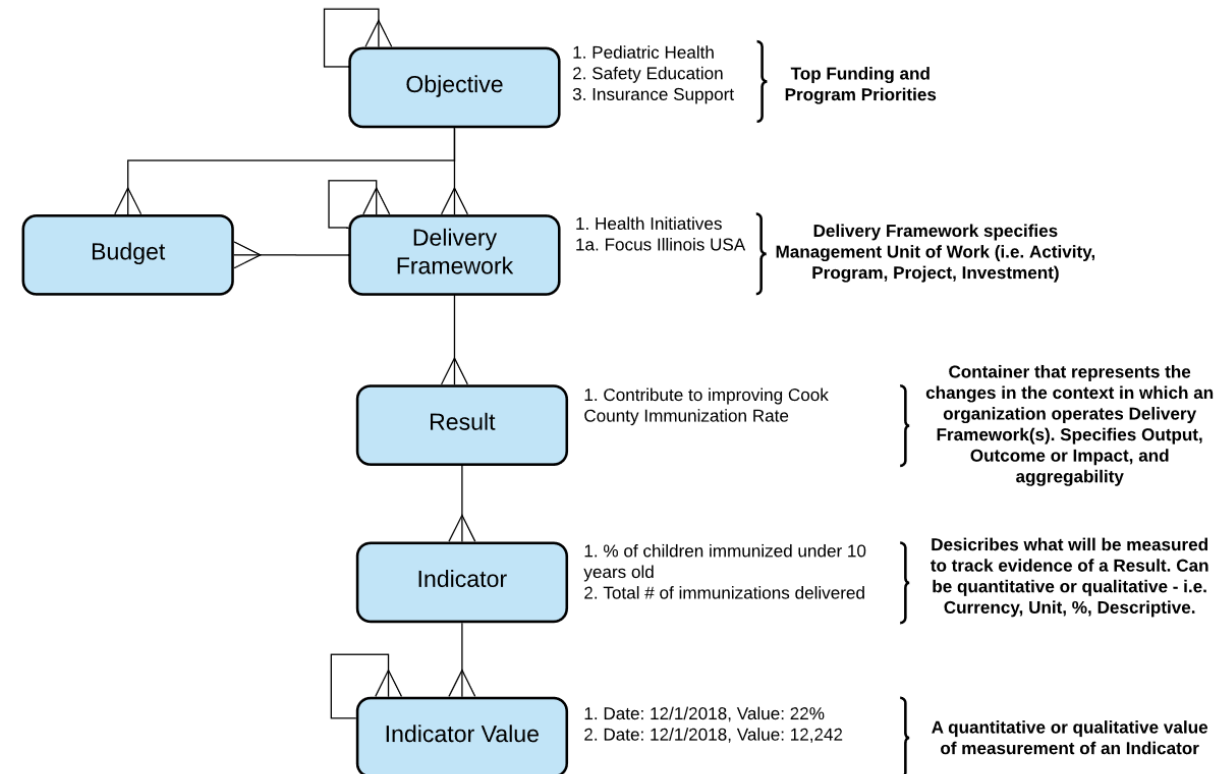
Entity Name	Definitions and Common Uses to the Nonprofit Market
1 Account	An account is a business that represents a donor, potential donor, grant maker or grant maker. For nonprofits, accounts can be Corporations, Companies, Foundations or Agencies. Many nonprofits (501c3s) use a concept of "organization" to track company information and address contacts of a particular organization who influence giving. In the case of a business transaction between two companies, the account is the organization that is the beneficiary.
2 Address	A contact is a person or organization who is involved in a relationship with an organization. An individual contact can work on its own, or be part of a household along with other contacts with whom it has a relationship. A contact can also be part of an organization, and a nonprofit uses the concept of organization to track which contacts have an influence on an organization's giving. For instance, Mrs. Smith sometimes volunteers for an orchestra. Smith sometimes gives financially, sometimes gives on her husband's behalf with her partner, but sometimes gives through her medical practice. All these contacts require specific tracking, reporting, recordation against the financial system, and a relationship.
3 Budget	A budget is a financial plan or statement of anticipated revenues and expenses for a period of time. It is used to allocate resources and track financial performance. It is a key tool for financial management and planning.
4 Campaign	A campaign is a series of coordinated activities designed to achieve a specific goal or objective. It can be used for fundraising, advocacy, or other purposes. It is a key tool for strategic planning and execution.
5 Contact	A contact is a person or organization who is involved in a relationship with an organization. An individual contact can work on its own, or be part of a household along with other contacts with whom it has a relationship. A contact can also be part of an organization, and a nonprofit uses the concept of organization to track which contacts have an influence on an organization's giving. For instance, Mrs. Smith sometimes volunteers for an orchestra. Smith sometimes gives financially, sometimes gives on her husband's behalf with her partner, but sometimes gives through her medical practice. All these contacts require specific tracking, reporting, recordation against the financial system, and a relationship.
6 Campaign	A campaign is a series of coordinated activities designed to achieve a specific goal or objective. It can be used for fundraising, advocacy, or other purposes. It is a key tool for strategic planning and execution.
7 Designation Credit	A designation credit is a financial instrument that is used to track the amount of a grant or contribution that is allocated to a specific program or project. It is a key tool for financial management and reporting.
8 Designation Plan	A designation plan is a document that outlines the terms and conditions of a grant or contribution. It is a key tool for financial management and reporting.
9 Budget	A budget is a financial plan or statement of anticipated revenues and expenses for a period of time. It is used to allocate resources and track financial performance. It is a key tool for financial management and planning.
10 Campaign	A campaign is a series of coordinated activities designed to achieve a specific goal or objective. It can be used for fundraising, advocacy, or other purposes. It is a key tool for strategic planning and execution.
11 Designation	A designation is a financial instrument that is used to track the amount of a grant or contribution that is allocated to a specific program or project. It is a key tool for financial management and reporting.
12 Education	Education is the process of acquiring knowledge, skills, and values. It is a key tool for personal and professional development. It is a key tool for strategic planning and execution.
13 Employment History	Employment history is a record of an individual's work experience. It is a key tool for personal and professional development. It is a key tool for strategic planning and execution.

- 38 entities – 32 new & 6 extensions
- 691 new data attributes

## Program Delivery

### Combines Objective & Delivery Framework Investment Over Time

Health Initiatives:  
 - \$980,000 Pediatric Health FY2019  
 - \$1,200,000 Insurance Support FY2019  
 Focus Illinois:  
 - \$450,000 Safety Education FY2019  
 - \$620,000 Pediatric Health FY2019



# Call to Action

Review the Common Data Model for Nonprofit and **provide input**

Identify common **external data sources** so we can build connectors

Communicate **common use cases** where new tools are needed

Connect us to key **private partners** in your ecosystem

Identify opportunities where Microsoft can provide **capacity building**

Take the survey: [aka.ms/CDM4Nonprofits](https://aka.ms/CDM4Nonprofits)

# Thank you!

- Microsoft Core Common Data Model  
<https://github.com/Microsoft/cdm>
- Microsoft Common Data Model for Nonprofits  
<https://github.com/Microsoft/Dynamics-365-Industry-Accelerators/tree/master/nfp>
- Test Drive  
<https://aka.ms/dynamics365nonprofitaccelerator>
- Blog announcements  
<https://blogs.microsoft.com/on-the-issues/?p=62316>  
<Aka.ms/CDMFirstLook>  
<Aka.ms/CDMContext>



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