



# **Business Intelligence for NGOs Using Excel and Power Query Training Course**

**Ref: #BUI3115**



## **Course Introduction / Overview:**

In the modern landscape, nonprofit organizations face increasing pressure to demonstrate their effectiveness and accountability to donors, stakeholders, and the public. This demand has made data-driven decision-making a necessity, not just a luxury. This training course, offered by BIG BEN Training Center, is designed to empower professionals in the non-profit sector to harness the full potential of their data. We will move beyond simple data storage to an understanding of a comprehensive data management strategy. Participants will learn how to transform raw data into a compelling narrative of impact and efficiency. The course dives into the core concepts of business intelligence and its application specifically within non-governmental organizations, from measuring social impact to optimizing fundraising campaigns. Drawing on the principles from authors like Amanda Kline in her work, “Data-Driven Decision Making in Nonprofit Organizations,” we will explore how to build a data culture. The curriculum focuses on practical applications, using familiar and powerful Microsoft tools, Excel and Power Query. We will cover a range of essential skills, including data collection, cleaning, transformation, and visualization. Ultimately, this program provides the technical expertise and strategic insight needed to effectively communicate your organization’s mission and measure its success.

## **Target Audience / This training course is suitable for:**



- NGO and non-profit staff involved in program management and impact assessment.
- Fundraising and donor relations specialists.
- Monitoring and evaluation officers.
- Data analysts and data officers working in the humanitarian sector.
- Financial officers and accountants in non-profit organizations.
- Project managers and coordinators.
- Government agencies and their equivalents with social missions.

### **Target Sectors and Industries:**

- Non-governmental organizations (NGOs).
- Non-profit and charity organizations.
- Humanitarian aid and development sectors.
- Social enterprises.
- Public sector and government agencies.
- Academic and research institutions focused on social impact.
- Foundations and philanthropic groups.

### **Target Organizations Departments:**

- Monitoring, evaluation, accountability, and learning (MEAL) departments.
- Finance and accounting departments.
- Programs and project management departments.
- Communications and fundraising teams.
- Human resources departments.
- Data and analytics teams.
- Grants and compliance departments.

### **Course Offerings:**



By the end of this course, the participants will have able to:

- Apply business intelligence principles to solve common NGO data challenges.
- Use Power Query to connect to, clean, and transform messy data from various sources.
- Model data effectively within Excel to create meaningful relationships.
- Build dynamic dashboards and reports to visualize key performance indicators (KPIs) and track program outcomes.
- Create and share compelling data stories that showcase organizational impact to stakeholders and donors.
- Automate repetitive data cleaning and reporting tasks, saving significant time.
- Leverage advanced Excel functions to analyze and interpret large datasets for better decision-making.

## **Course Methodology:**



This training course is built around an interactive and practical approach to learning. Participants will not just listen to lectures; they will actively engage with the material through hands-on exercises, real-world case studies, and collaborative teamwork. The methodology is designed to reflect the real-life data challenges faced by professionals in non-governmental organizations. We will begin each unit with a clear explanation of the core concepts, followed by a live demonstration of the tools in action. Afterward, participants will have the opportunity to apply what they have learned by working on practical exercises using sample NGO data sets. Group activities will promote a collaborative learning environment where participants can share their experiences and solve problems together. Throughout the course, BIG BEN Training Center will provide personalized feedback and support, ensuring every participant can master the skills. The program emphasizes an agile learning process, with regular check-ins and opportunities for questions and clarification. By the end, participants will have not only gained new skills but will have also built a portfolio of practical reports and dashboards they can immediately use in their work.

## **Course Agenda (Course Units):**

### **Unit One: The Power of Data-Driven Decision-Making for Non-Profits**



- Understanding the role of business intelligence in the non-profit sector.
- Distinguishing between descriptive, diagnostic, predictive, and prescriptive analytics.
- Identifying key metrics and performance indicators for NGO programs and fundraising.
- Planning a data strategy for impact assessment and donor reporting.
- Exploring case studies of NGOs that have successfully used data to scale their impact.
- Introduction to the tools: Excel and Power Query.
- Setting up your Excel environment for data management and analysis.

## **Unit Two: Data Transformation with Power Query**

- Connecting to and importing data from various sources.
- The Power Query Editor interface and its core functions.
- Cleaning messy data: removing duplicates, handling errors, and managing missing values.
- Shaping and transforming data: pivoting, unpivoting, splitting, and merging columns.
- Creating and using custom columns with M language basics.
- Merge multiple datasets into a single, cohesive table.
- Automating data refresh processes to save time on manual tasks.

## **Unit Three: Data Modeling and Relationships in Excel**

- Principles of effective data modeling for business intelligence.
- Creating a star schema for analysis and reporting.
- Building relationships between different data tables.
- Working with Excel's Data Model and managing relationships.
- Introduction to Data Analysis Expressions (DAX) basics.
- Creating calculated columns and measures.
- Troubleshooting common data modeling issues.

## **Unit Four: Advanced Data Analysis and Reporting**



- Mastering PivotTables for dynamic data summarization and analysis.
- Advanced PivotTable features like Slicers and Timelines for interactive filtering.
- Creating interactive charts and visualizations from your data model.
- Designing and building professional, multi-sheet reports.
- Applying conditional formatting to highlight key trends and anomalies.
- Using advanced Excel functions such as VLOOKUP, INDEX/MATCH, and XLOOKUP for data retrieval.
- Conducting scenario analysis to project future outcomes for fundraising or programs.

### **Unit Five: Building Compelling Dashboards and Data Stories**

- Principles of effective dashboard design and user experience.
- Creating a single-page, executive dashboard.
- Crafting a compelling data story to communicate your impact.
- Sharing your reports and dashboards securely with stakeholders.
- Presenting your findings and insights with clarity and confidence.
- Review of best practices for data management and governance in non-profits.
- Final project: building a complete business intelligence solution for an NGO case study.

### **FAQ:**

#### **Qualifications required for registering to this course?**

There are no requirements.

#### **How long is each daily session, and what is the total number of training hours for the course?**

This training course spans five days, with daily sessions ranging between 4 to 5 hours, including breaks and interactive activities, bringing the total duration to 20 - 25 training hours.

#### **Something to think about:**



How can the adoption of data-driven decision-making fundamentally shift an NGO's mission from reacting to needs to proactively anticipating and addressing future challenges?

## **What unique qualities does this course offer compared to other courses?**

This course stands out because it is specifically tailored to the unique challenges and opportunities within the non-profit sector. While many data analysis courses teach general skills, this program focuses on the contextual application of business intelligence for NGOs. Participants will learn how to go beyond mere numbers to tell the compelling human story behind the data, a critical skill for fundraising, grant reporting, and stakeholder engagement. We use real-world case studies from the humanitarian and development fields, allowing for a deeper, more relevant understanding. The curriculum also emphasizes the integration of familiar tools, Excel and Power Query, empowering professionals to build powerful business intelligence solutions without needing to invest in complex or expensive software. The practical, hands-on methodology ensures that every participant leaves with tangible skills and a portfolio of reports and dashboards they can use right away. This approach, centered on practical application and the specific needs of the non-profit world, makes this course a transformative experience, enabling organizations to better track their impact, optimize their operations, and secure more funding.