How Microsoft is Aligning to IATI

Erik Arnold
Global CTO, Tech for Social Impact
Microsoft

IATI TAG - November 15, 2018
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

Infrastructure & Security
iRespond | ID2020

Productivity & Collaboration
Operation Smile | SERP

Constituent Management & Operations
Team Rubicon | Danish Refugee Council

Microsoft Dynamics 365
Office
Azure

Microsoft
Our shared responsibility

Private sector

Public sector

Nonprofits
# Top Scenarios for Nonprofits

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

Private sector partners

Delivering key scenarios

Built on integrated tools

Consuming an open standard

Partner Apps

Constituent Management
Fundraising
Donation Processing
Beneficiary Management
Volunteer Management
Program Delivery
Grant/Award Management
Finance
M&E
Logistics & Supply
Talent
Collaboration
Knowledge Management

D365 Customer Engagement Apps

Finance & Ops Apps

Talent Apps

Modern Workplace

Azure – Core Infrastructure/Advanced Analytics & Reporting

Data Connectors / Aggregated Data Sets

Microsoft Common Data Model for Nonprofits
## Nonprofit Accelerator Partners

![Logos of Nonprofit Accelerator Partners](image)

<table>
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<tr>
<th>Nonprofit Accelerator</th>
<th>Sample Apps</th>
<th>Templates</th>
<th>Connectors</th>
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<td>Common Data Model for Nonprofits</td>
<td>Microsoft Common Data Model</td>
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### Key Scenarios

#### Constituent Management

- **Account Management**
  - 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.

#### Fundraising

- **Campaign Management**
  - Campaign creation—create campaign, identify goals, and track donations as a result of the campaign

- **Multi-channel Marketing**
  - Market campaigns and events through various channels—To include email, websites, and social media
  - Personalized outreach—Automatic notifications, individual emails, print communications, mass mailings, and target groups

#### Donation Management

- **Donation Processing**
  - 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

- **Payment Integration**
  - Integration with payment processing platform for all types of donations

#### Volunteer Management

- **Volunteer Lifecycle Management**
  - Volunteer strategy—Identify program volunteer needs to include skills, number of volunteers, and timing
  - Recruit, onboard, train, & offboard—Get qualified volunteers to help program, provide training & certifications, and offboard when the volunteer leaves
  - Plan—Organize volunteers with sign-ups, scheduling, and assignment

#### Program Delivery

- **Define & Track Programs from Strategy to Execution**
  - Define hierarchy of programs and projects and track activities, outputs, and outcomes to the programs and projects

- **Service Delivery**
  - Delivery of programmatic services directly to beneficiaries

#### Monitoring and Evaluation

- **Results Measurement**
  - Outcomes tracking, log frames, measuring program efficacy

- **Predictive Analysis**
  - Using AI/machine learning and data mining aggregate program and operational data to gain insights

#### Grant and Award Management

- **Award Management**
  - 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

- **Sub-recipient Management**
  - Tracking of sub-recipients/sub-awards to the grant to include budgets, objectives, activities, performance, etc.

- **Results Tracking**
  - Set performance measures against each objective & track progress throughout the life of the grant

#### Beneficiary Management

- **Beneficiary Management**
  - 360 degree view of the services that the beneficiary has utilized, relationships staff and donations

- **Case Management**
  - 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

### Insights & Analytics
## Nonprofit End-to-End Capabilities

<table>
<thead>
<tr>
<th>Constituent Management</th>
<th>Donation Management</th>
<th>Beneficiary Management</th>
<th>Finance</th>
<th>Human Resources</th>
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<td>Account Management</td>
<td>Donation Processing</td>
<td>Individual Management</td>
<td>Revenue &amp; fund management</td>
<td>Compensation &amp; Benefits</td>
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<td>Constituent Data Acquisition</td>
<td>Payment Integration</td>
<td>Case Management</td>
<td>Project account</td>
<td>Payroll</td>
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<td>Constituent Network</td>
<td>GIK Management</td>
<td>Beneficiary Experience</td>
<td>Service Billing</td>
<td>Staff Portal</td>
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<td>Membership Management</td>
<td>Corporate Giving</td>
<td>Sponsorship</td>
<td>Project Budgeting</td>
<td>Attract and Hiring</td>
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<td>Donor/Grantee Experience</td>
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<td>Forecasting &amp; Planning</td>
<td>Performance &amp; Feedback</td>
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<td>Fundraising</td>
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<td>Monitoring &amp; Evaluation</td>
<td>Tax Reporting</td>
<td>Compliance &amp; Workplace Safety</td>
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<td>Campaign Management</td>
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<td>Merchant &amp; Payment Services</td>
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<td>Project Planning &amp; Delivery</td>
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### Analytics and Reporting

- Volunteer Lifecycle Management
- Volunteer Experience
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

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

✉️ Erik.arnold@microsoft.com  lponti@microsoft.com
LinkedIn: linkedin.com/in/erikaarnold
Twitter: @msftnonprofits