# The Nonprofit Data Collection Reference Guide

*A Complete Framework for Institutional Fundraising Readiness*

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*Your funding partner.*

# HOW TO USE THIS GUIDE

This guide follows the logic model sequence that funders use to evaluate nonprofit programs: Inputs, Activities, Outputs, Outcomes, and Impact. Each section details the specific data points your organization should be collecting, maintaining, and preparing to report at every stage of the program lifecycle.

Use this guide to audit your current data infrastructure, identify gaps, build stronger grant applications, and prepare for funder reporting and compliance reviews. Whether you are applying to a private foundation, a corporate partner, or a government agency, the data categories in this guide represent the full picture of what institutional funders expect.

*This is not a theoretical framework. It reflects what funders actually ask for across Letters of Inquiry, full proposals, government applications, grant reports, audits, and site visits.*

# SECTION ONE: ORGANIZATIONAL READINESS DATA

*Before funders evaluate your programs, they evaluate your organization. This is the baseline information you need organized and accessible at all times.*

## Organizational Foundation Data

- Legal name of the organization
- Employer Identification Number (EIN/Tax ID)
- 501(c)(3) determination letter from the IRS
- Unique Entity Identifier (UEI) and active SAM.gov registration (required for all federal grants)
- Organization founding date
- Current mission statement
- Current vision statement
- Geographic service area (cities, counties, regions, states served)
- Current fiscal year organizational budget size
- Board of directors list with professional affiliations
- Current strategic plan (or summary of strategic priorities)
- Organizational chart showing leadership structure and reporting lines

## Financial Data

- Current fiscal year operating budget (income and expense)
- Most recent audited financial statements (or independent financial review if below audit threshold)
- Last two years of IRS Form 990s
- Balance sheet showing assets and liabilities
- Revenue breakdown by source: earned income, government, foundation, corporate, individual
- Indirect cost rate (de minimis up to 15% of modified total direct costs per the 2024 revision to 2 CFR 200, or a federally negotiated rate)
- Federally negotiated indirect cost rate agreement (NICRA), if applicable

- Documentation of compliance with 2 CFR 200 Uniform Guidance (cost principles, audit requirements, and internal financial controls) for organizations pursuing or managing federal funds

### Staffing and Capacity Data

- Key staff bios and resumes (executive director, program leads, finance lead, development lead)
- Staff qualifications, credentials, licenses, and certifications relevant to program delivery
- Organizational capacity narrative describing infrastructure, systems, and institutional knowledge
- Partnership MOUs or letters of support from collaborators
- Description of data management and CRM systems in use
- Description of financial management systems and internal controls

### Compliance and Governance Data

- Board meeting minutes (most recent fiscal year)
- Governance policies (bylaws, board terms, committee structure)
- Conflict of interest policy
- Whistleblower policy
- Document retention and destruction policy
- Nondiscrimination policy
- Most recent audit management letter (if applicable)
- Insurance certificates: general liability, directors and officers (D&O), professional liability
- Relevant regulatory compliance documentation (HIPAA, FERPA, or sector-specific requirements)
- Single Audit documentation and readiness (for organizations expending $1,000,000+ in federal funds annually per the 2024 revision to 2 CFR 200)
- Time and effort documentation protocols for grant-funded staff

### Funder-Specific Intelligence Data

- Each funder's stated giving priorities and focus areas
- Average award size and grant range
- Past grantee lists and giving patterns (from 990-PF analysis)

- Program officer names, contact information, and relationship history
- Submission deadlines and reporting deadlines mapped across the full fiscal year
- Prior relationship or communication history with the funder
- Notes on funder site visit protocols, review timelines, and decision-making processes

## SECTION TWO: PROGRAM INPUTS

*Resources invested to operate the program. Inputs are what your organization brings to the table before any services are delivered. Funders evaluate inputs to assess whether you have the infrastructure to execute what you propose.*

### Financial Resources

- Grant funding allocated to the program (by funder and award amount)
- General operating funds dedicated to the program
- Matching funds or cost-share commitments required by funders
- In-kind revenue or donated goods and services with estimated monetary value
- Leveraged or braided funding from other sources supporting the same program

### Human Resources

- Staff positions with FTE allocation dedicated to the program (e.g., Program Manager at 0.5 FTE)
- Staff qualifications, credentials, licenses, and certifications relevant to service delivery
- Contractors or consultants engaged to deliver specific program components
- Volunteers: number of individuals, roles assigned, total hours contributed, and associated training costs
- Leadership and supervisory oversight time allocated to the program
- Administrative and back-office support allocated (HR, finance, IT, legal, compliance)

### Physical and Material Resources

- Facilities: office space, program delivery sites, co-located partner space, rent, and utilities
- Equipment and technology: computers, software licenses, vehicles, specialized program tools

- Supplies and materials: educational packets, toolkits, office supplies, program-specific goods
- Curriculum, training materials, evidence-based models, and program manuals

### Partnerships and Agreements

- Formalized partnerships and MOUs with referral networks, co-service providers, and institutional collaborators
- Subcontractor and subrecipient agreements for delegated program delivery
- Letters of commitment from partners confirming specific collaboration roles and contributions

### Data and Knowledge Infrastructure

- Needs assessment data: community-level data justifying the program's existence and design
- Evidence base and research literature supporting the program model or theory of change
- Data and evaluation systems: CRM, case management platforms, intake tools, and reporting software
- Participant recruitment and enrollment infrastructure: intake systems, referral pipelines, eligibility screening criteria, and outreach channels
- Consent and data collection protocols: participant consent forms, data sharing agreements, privacy compliance frameworks (HIPAA, FERPA), and IRB approvals if applicable

### Assumptions

*Many funders and logic model frameworks require organizations to name their assumptions explicitly:*

- Beliefs about available resources and sustained support
- Expectations about participant engagement, motivation, and behavior
- Theories about the connection between activities, outputs, and outcomes
- External factors that may affect the program but cannot be controlled by program staff

# SECTION THREE: PROGRAM ACTIVITIES

*What staff actually do with the inputs to produce the outputs. Activities describe the work happening between resource deployment and countable results.*

## Direct Service Delivery

- Counseling sessions (individual, group, family)
- Case management meetings and follow-up contacts
- Classroom instruction, workshops, and trainings
- Mentoring and coaching sessions
- Peer support and group facilitation
- Crisis intervention and emergency response
- Health screenings, assessments, and clinical encounters
- Housing navigation and placement assistance
- Employment readiness and job placement services
- Benefits enrollment and system navigation assistance
- Legal consultations and advocacy support
- Transportation assistance coordination

## Program Administration

- Enrollment processing and eligibility determination
- Participant intake and orientation
- Data entry and file maintenance
- Service plan development and updates
- Progress documentation and case notes
- Internal reporting and data reconciliation
- Staff supervision and quality assurance reviews
- Program scheduling and logistics coordination

## Partnership Coordination

- Referral follow-up with partner organizations
- MOU activation and partnership check-ins
- Co-case management and shared service planning

- Partner reporting and information sharing
- Joint service delivery coordination
- Cross-training with partner staff

### Community Engagement

- Community outreach events and information sessions
- Participant recruitment and enrollment campaigns
- Public presentations and community education
- Advisory board and community council participation
- Stakeholder convenings and listening sessions
- Media engagement and public awareness activities

# SECTION FOUR: PROGRAM OUTPUTS

*Direct, countable products of program activities. Outputs answer the question: What did we do, and how much of it did we do?*

## Service Delivery Counts

- Number of individuals served (unduplicated count)
- Number of individuals enrolled or admitted to the program
- Number of individuals completing the full program cycle
- Number of sessions, workshops, classes, or trainings delivered
- Number of direct service hours provided
- Number of service contacts or encounters
- Number of assessments, screenings, or intakes completed
- Number of referrals made to partner services
- Number of individualized service plans developed
- Number of applications submitted on behalf of participants
- Number of events, convenings, or community meetings held
- Number of outreach contacts (calls, presentations, door knocks)
- Number of follow-up contacts completed
- Number of materials developed and distributed
- Number of staff or volunteers trained to deliver the program
- Number of sites or locations where services were delivered
- Number of partnerships or collaborations activated
- Number of reports, publications, or data products produced

## Participant Demographic Data

- Age and date of birth
- Race and ethnicity (aligned with Census categories where possible)
- Gender identity
- Sexual orientation (where relevant and collected with informed consent)
- Preferred pronouns (increasingly requested in equity-centered reporting)
- Primary language spoken

- Household size and composition
- Income level or federal poverty level percentage
- Housing status (housed, unhoused, unstably housed, transitional)
- Employment status
- Education level
- Disability status
- Veteran status
- Immigration or citizenship status (where relevant and collected with informed consent)
- Tribal affiliation (relevant for AIAN-serving programs and certain federal funders)
- Geographic location (zip code, city, county, neighborhood)
- Health insurance status
- Justice system involvement
- Re-entry/formerly incarcerated status (as a standalone field)
- Pregnancy or postpartum status (relevant for maternal health and family-serving programs)
- Parenting or caregiver status
- Special population identifiers required by the funder

### Enrollment and Participation Data

- Number of individuals who applied or were referred to the program
- Number of individuals who met eligibility criteria
- Number of individuals enrolled versus number on waitlist
- Referral source tracking (self-referral, partner referral, outreach, walk-in, funder-referred)
- Attendance and participation rates (sessions attended per participant)
- Dosage data (total hours or units of service received per participant)
- Retention rate (percentage who remained engaged through milestones)
- Attrition rate (number who dropped out and at what point)
- Reasons for attrition or non-completion (where tracked)
- Unique participant IDs linking intake through completion for longitudinal tracking

### Quality and Satisfaction Data

- Participant satisfaction survey results (pre/post or post-program)

- Net Promoter Score or equivalent satisfaction metric
- Participant feedback from focus groups, interviews, or open-ended surveys
- Staff-to-participant ratio maintained during service delivery
- Program fidelity measures (was the program delivered as designed)
- Cultural responsiveness and language access metrics
- Accessibility accommodations provided
- Third-party or external evaluation findings (where applicable)

### Qualitative and Storytelling Data

- Number of participant success stories collected (with signed informed consent)
- Number of testimonials gathered from participants, families, or community partners
- Number of photos, video clips, or media assets collected for reporting
- Interview or focus group transcripts (stored with participant consent)
- Case management notes documenting participant progress and milestones

### Compliance and Documentation Outputs

- Number of participant files completed and compliant with funder requirements
- Number of consent forms on file
- Number of incident reports filed (where applicable)
- Number of grievances received and resolved
- Time and effort documentation for grant-funded staff
- Subrecipient monitoring reports completed (if program includes sub-awards)
- Data quality audit results: percentage of complete files, percentage of fields with missing data
- Funder site visit readiness checklist status

# SECTION FIVE: PROGRAM OUTCOMES

*What changes as a result of the program. Outcomes measure what changed, not what you did. This is the data funders care about most.*

### Short-Term Outcomes (0 to 6 months)

*Knowledge gained, skills acquired, attitudes shifted, behaviors initiated.*

- Percentage of participants demonstrating increased knowledge (pre/post assessment)
- Percentage completing a skills-based training or certification
- Percentage demonstrating increased financial literacy
- Percentage completing job readiness training
- Percentage reporting improved coping skills or emotional regulation
- Percentage demonstrating awareness of available resources and services
- Percentage who created an individualized goal plan
- Percentage reporting increased confidence or self-efficacy
- Percentage who initiated a new behavior (e.g., opened a savings account, attended a support group)

### Intermediate Outcomes (6 to 18 months)

*Sustained behavior change, milestone achievement, system navigation.*

- Percentage who obtained employment
- Percentage who secured stable housing
- Percentage maintaining sobriety or treatment engagement at 6 months
- Percentage enrolled in post-secondary education or vocational training
- Percentage who achieved a measurable income increase
- Percentage who obtained health insurance coverage
- Percentage who successfully navigated a public system (benefits, legal, immigration, child welfare)
- Percentage maintaining engagement with ongoing support services
- Percentage who advanced to a higher level of program participation or independence

### Long-Term Outcomes (18+ months)

*Population-level or sustained life change.*

- Percentage maintaining employment at 12 months post-program
- Percentage maintaining stable housing at 12 months post-program
- Percentage avoiding recidivism within 24 months
- Percentage achieving income above federal poverty level
- Percentage maintaining sobriety or recovery milestones at 12+ months
- Percentage who completed a degree or credential program
- Reduction in emergency room visits or crisis service utilization
- Improvement in community-level indicators (where program scale supports measurement)

## Outcome Measurement Methodology

*For each outcome tracked, document:*

- Instrument or tool: validated assessment, pre/post survey, third-party data match, self-report
- Measurement timing: intake/baseline, midpoint, exit/completion, post-program follow-up
- Target threshold: specific, measurable target (e.g., 75% will demonstrate improvement)
- Data source: internal database, partner agency records, public data systems, participant self-report
- Responsible party: who collects and enters the outcome data

# SECTION SIX: PROGRAM IMPACT

*The broadest level of change your program contributes to. Most funders understand that impact is cumulative and shared across many actors.*

## Impact Indicators

- Changes in community-level conditions your program addresses (poverty rates, homelessness counts, recidivism rates, health disparities, educational attainment)
- Systems-level changes your organization has contributed to (policy changes, new service models adopted, improved provider coordination)
- Shifts in community awareness, norms, or behaviors related to the issue
- Evidence of institutional or structural change influenced by your advocacy, data, or service model
- Contributions to the evidence base through published research, evaluation reports, or replicable models

## Articulating Impact in Proposals and Reports

- Connect outputs and outcomes to broader impact using your theory of change
- Use community-level data to contextualize your contribution
- Acknowledge the role of partners and systemic factors rather than overclaiming
- Use language such as "contributed to," "advanced," and "supported progress toward"

# SECTION SEVEN: DATA COLLECTION MECHANISMS

*The tools and processes your organization uses to capture all of the data described above.*

## Point-of-Entry Collection

- Participant intake forms (standardized across programs)
- Eligibility verification documentation
- Demographic and self-identification forms
- Consent and release forms (including data sharing permissions)
- Initial needs assessments and baseline surveys

## Ongoing Service Documentation

- Attendance sheets and sign-in logs (digital is preferable to paper)
- Case notes and service logs
- Session documentation and progress notes
- Pre- and post-assessments administered at defined intervals
- Dosage tracking (hours, sessions, units of service per participant)
- Referral tracking logs (referrals made, completed, pending)
- Milestone tracking (certifications earned, housing secured, employment obtained)

## Exit and Follow-Up

- Discharge and exit interviews
- Program completion documentation
- Follow-up and retention tracking at 30, 60, and 90 days post-exit
- Client satisfaction surveys
- Alumni engagement tracking (for programs maintaining post-program contact)

## Organizational and Financial

- Program budget tracking against actuals
- Staff time allocation and effort reporting
- In-kind contribution documentation
- Match and leverage tracking

# SECTION EIGHT: DATA SYSTEMS AND TOOLS

*Recommended platforms by organizational stage.*

### Getting Started (Limited Capacity)

Excel or Google Sheets with a standardized template. Create one master tracking document per program with consistent column headers, dropdown menus for standardized responses, and a clear data entry protocol. The most important thing at this stage is consistency, not sophistication.

### Growing (Multiple Programs or Funders)

For donor and funder relationship management, recommended platforms include Neon CRM and Bloomerang. For program participant data and case management, Bonterra Apricot (formerly Social Solutions Apricot) offers robust program tracking, outcomes measurement, and funder-ready reporting tools. Many organizations will need both a donor CRM and a case management platform as they scale.

### Complex Portfolio (Government Contracts, Multiple Reporting Requirements)

Salesforce Nonprofit Cloud or Blackbaud's Raiser's Edge NXT provide the depth, customization, and reporting power needed for large-scale data management. These systems require dedicated staff or consultant support to set up and maintain.

### Grants Management Platforms

For organizations managing multiple institutional funders, dedicated grants management tools such as Submittable, Fluxx, and AmpliFund can centralize deadline tracking, reporting workflows, and compliance documentation alongside your CRM.

### The Program Impact Tracker from Poppy Philanthropy Studio

The Program Impact Tracker is a 13-tab spreadsheet tool built for nonprofit program and development teams who need to collect participant data, document service delivery, measure outcomes, and report results to institutional funders. Unlike generic templates, every dropdown, formula, and dashboard metric is mapped directly to the reporting requirements of foundation, corporate, and government funders.

The tool includes automated KPI dashboards with charts, demographic breakdowns, outcome achievement rates, funder report prep worksheets with narrative prompts and submission checklists, and a data quality audit system. Designed by an institutional fundraising practitioner with experience managing 120+ grants across every funder type. Compatible with Google Sheets and Microsoft Excel. Includes 2 worked examples on every tab.

**$45** poppyphilanthropy.com/program-impact-tracker

# SECTION NINE: DATA GOVERNANCE AND QUALITY

*Clean data requires ongoing discipline, not a one-time cleanup.*

### Data Governance Essentials

- Designate a data champion or data quality lead (even if it is not a dedicated position)
- Document who enters data, who reviews it, who runs reports, and who resolves discrepancies
- Define standardized definitions for all key data fields
- Establish a data reconciliation cadence: weekly or biweekly review at minimum
- Conduct regular data quality audits: percentage of complete files, missing data, duplicate checks
- Maintain a data dictionary that defines every field, dropdown value, and reporting term

### Data Ethics and Equity

- Obtain informed consent from participants about how their data will be used and shared
- Collect demographic data in culturally responsive ways that allow individuals to self-identify
- Disaggregate data to reveal disparities rather than burying them in averages
- Report outcomes honestly, including when results fall short of targets
- Use strength-based, equity-centered framing when presenting data in narratives and reports
- Protect participant privacy and comply with all applicable data protection regulations

## About Poppy Philanthropy Studio

Poppy Philanthropy Studio is a boutique institutional fundraising consultancy that partners with nonprofits to build the funding infrastructure that secures and sustains revenue. Services include grant strategy, prospect research, proposal development, compliance management, funder stewardship, and organizational capacity building across foundation, corporate, and government funding streams. Poppy also offers digital tools for nonprofits, including the Institutional Fundraising Grant Tracker and the Program Impact Tracker, designed to help organizations collect, organize, and report the data funders require.

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