Mission Moment: Driving Impact with Data

Presenter: Anna Bierer

Why Data Matters

- Moves your work from anecdotal to provable
- Builds trust with funders, donors, and partners
- Identifies what's working — and what's not
- Drives decisions about programs, staffing, and funding

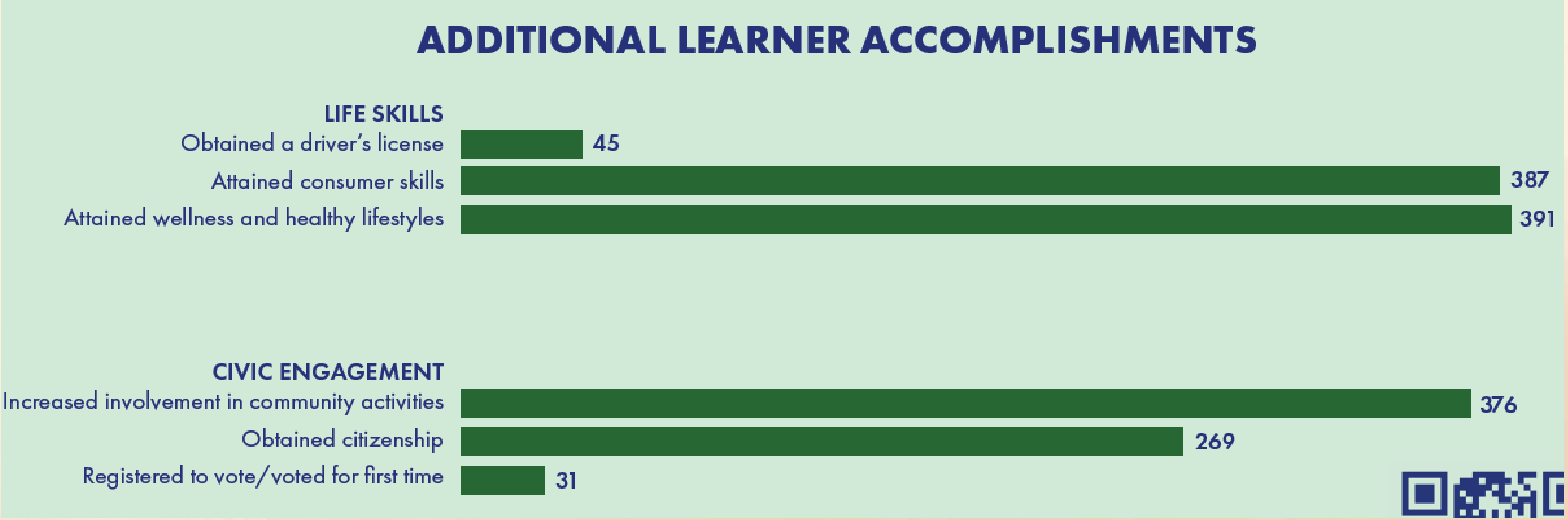
14,606 Students

health workforce community

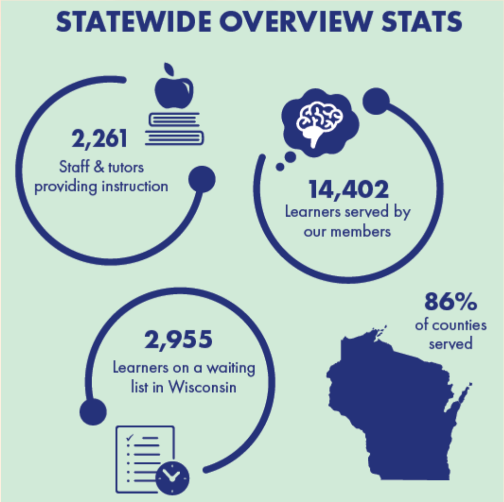
Why Data Matters

WL advocates for support with **your** data!

Together, we give our students a statewide voice!



Types of Data You Can Use



Quantitative Data:

- Test scores, attendance, completion rates
- Hours of instruction
- Number of students served

Qualitative Data:

- Student testimonials
- Teacher or volunteer feedback
- Stories of transformation

How You Can Use Data

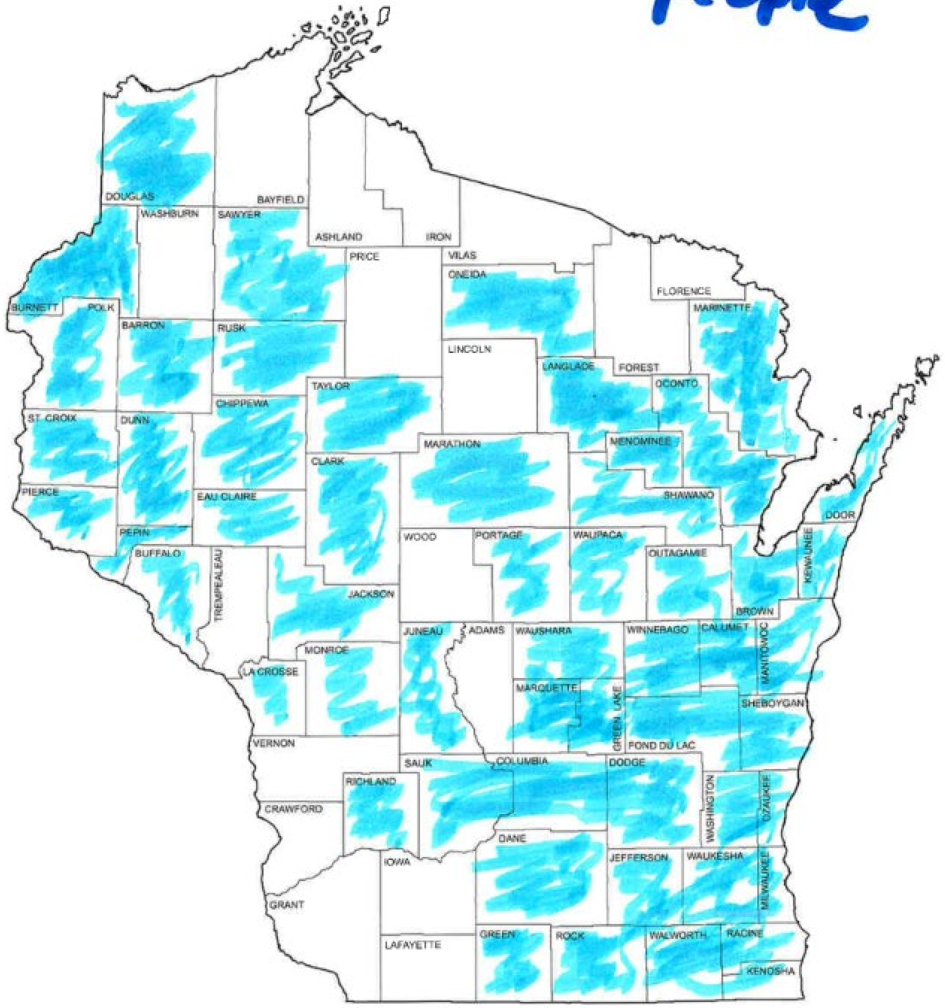
- Evaluate Programs: Track what works and improve where needed
- Guide Strategy: Plan staffing, outreach, and resources

- Communicate Impact: Use visuals and stories backed by numbers
- Build Credibility: Share outcomes with your community and funders

Wisconsin Literacy 40 Years
health workforce community

56/72 counties, 77.7% Land

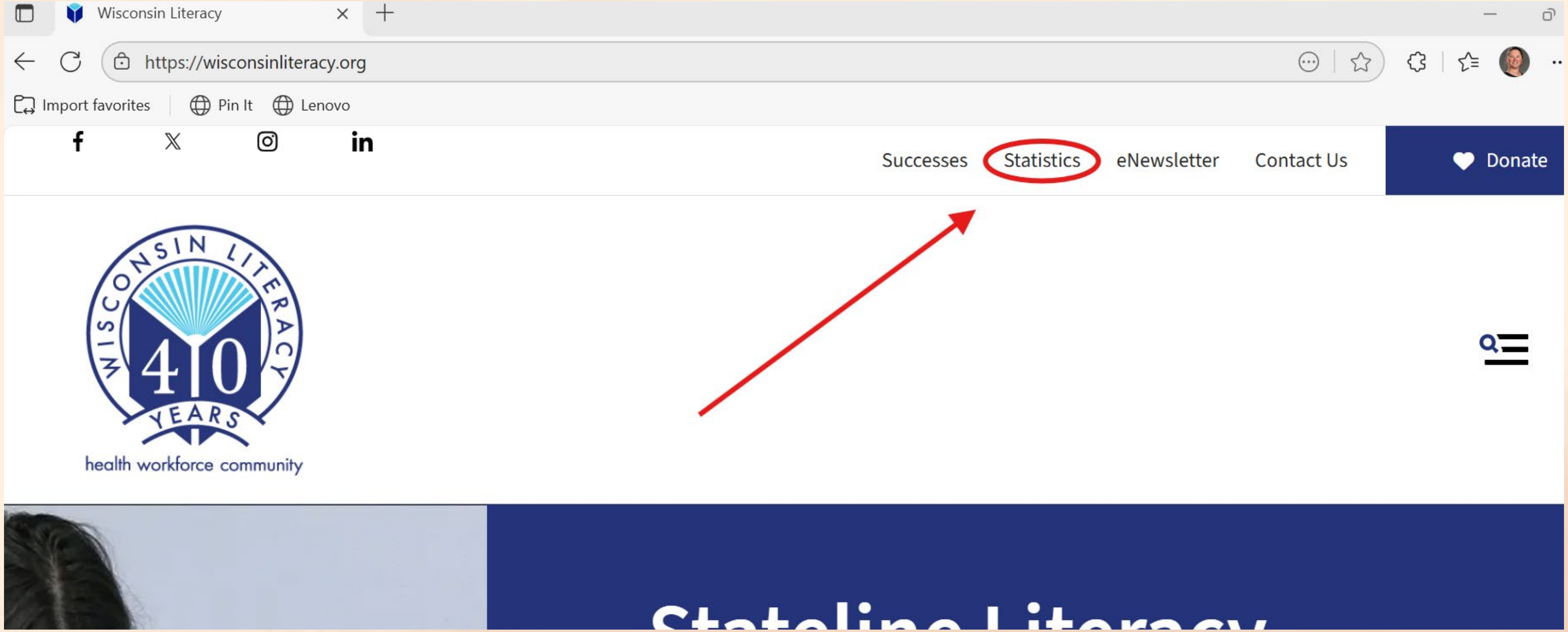
5,573,977/5,960,975, 93.5% people



WISCONSIN LITERACY 40 YEARS

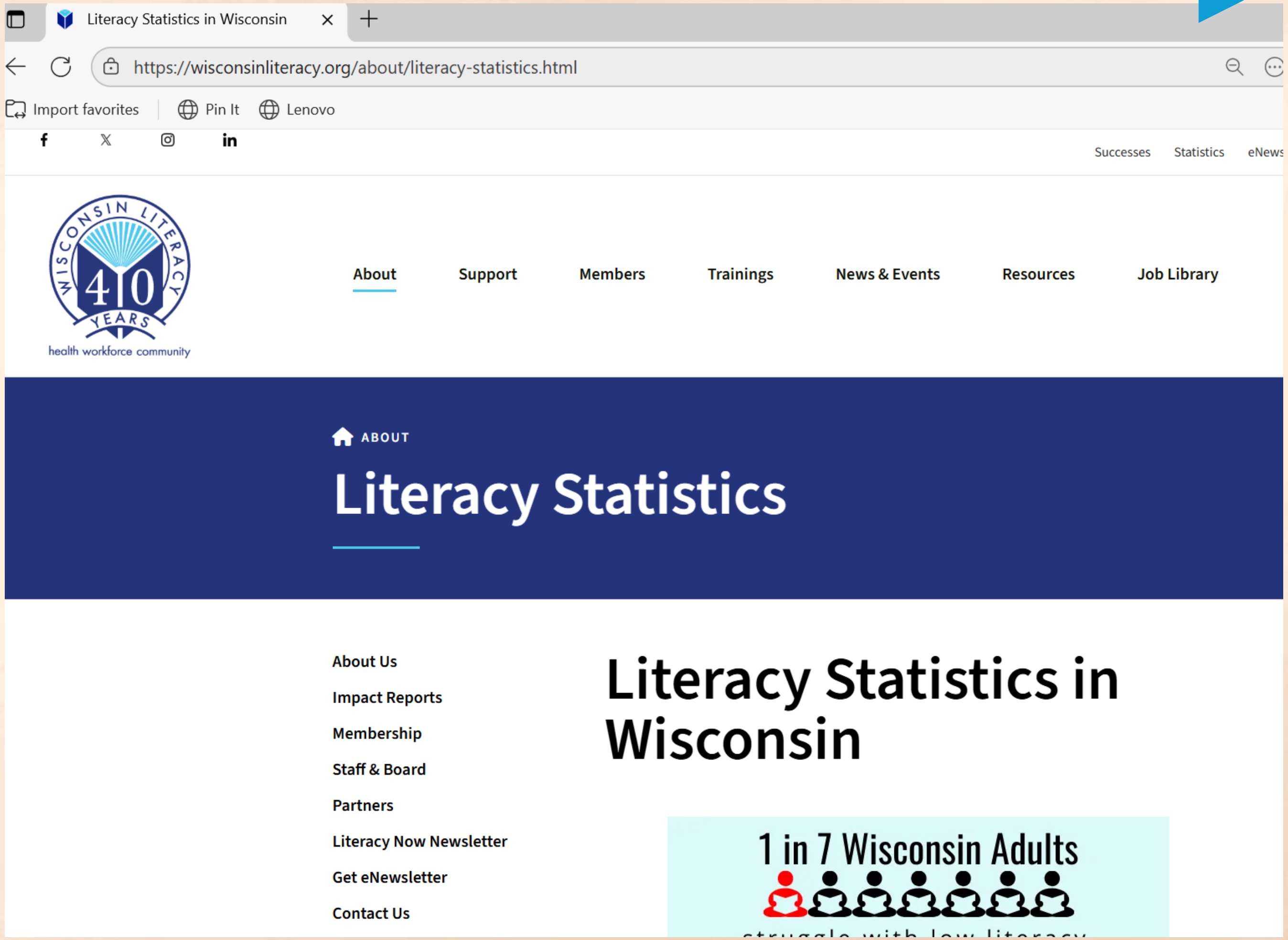
health workforce community

Navigating WL's Website



https://wisconsinliteracy.org/

Navigating WL’s Website



Navigating WL's Website

instructions.

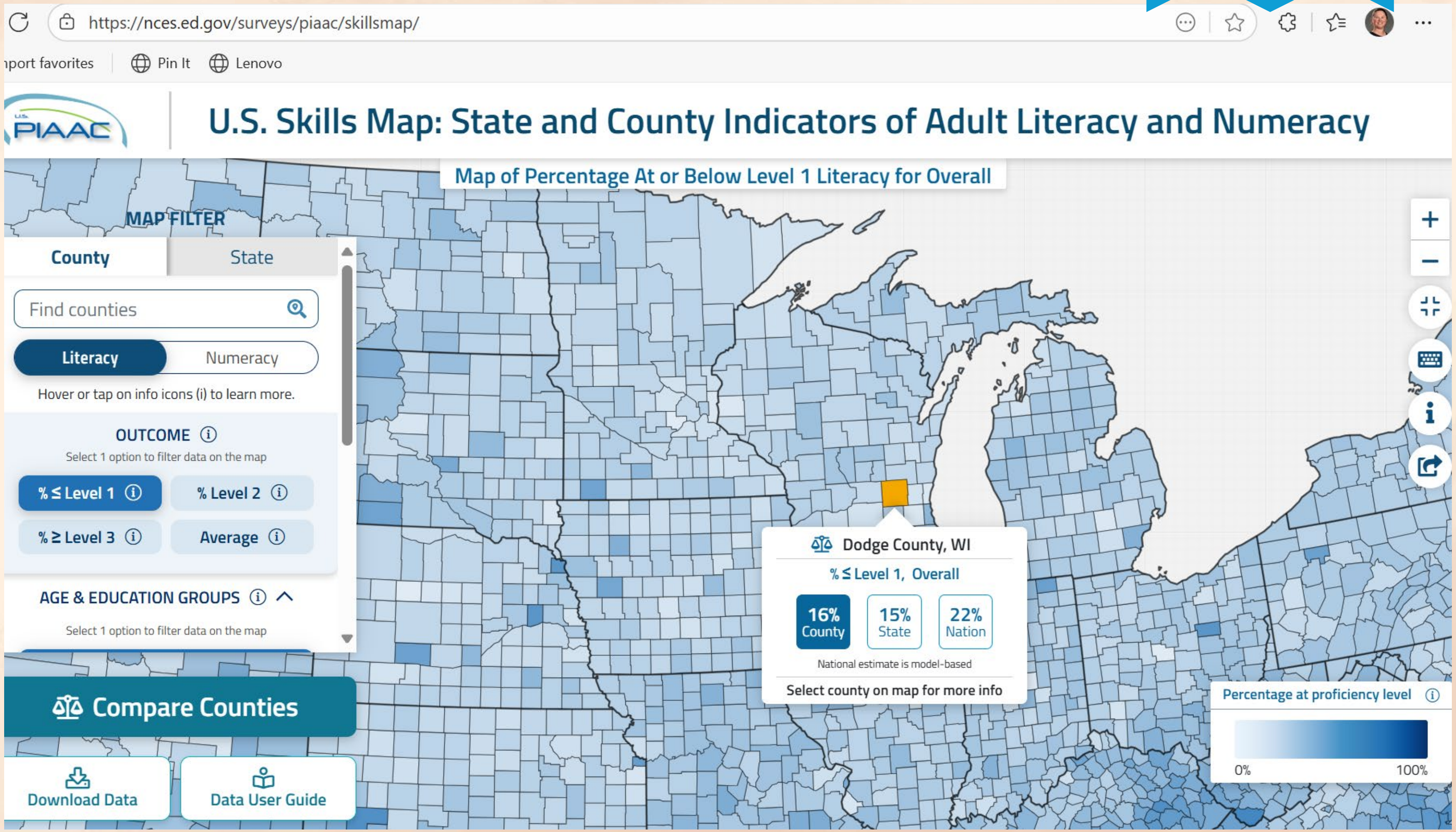
Numeracy, or the ability to understand and calculate numbers, is even worse. Almost **one in four** Wisconsin adults can perform, at most, basic adding, subtracting, dividing, and multiplying, but do not understand percentages or multiple step math problems.

Whether literacy, numeracy, or obtaining a high school equivalency, **1.5 million people** in Wisconsin need help building literacy skills.

These latest scores come from the National Center for Education Statistics (NCES)'s recently released U.S. Program for International Assessment of Adult Competencies (PIAAC) Skills Map. This interactive map estimates literacy and numeracy skill levels in all U.S. states and counties.

Research shows that literacy skills affect household incomes and health. In Milwaukee and Clark Counties where 25% and 22% of adults (respectively) are at or below the lowest literacy level, a higher percentage of residents are also below the poverty line (21% and 13%) and rate their overall health as "fair" or "poor" (15% and 13%). These statistics come from the Literacy Gap Map from the Barbara Bush Foundation for Family Literacy.

Navigating WL's Website



Turn Your Impact Into Evidence

- Start collecting your most important data points
- Share results with your board, funders, and volunteers
- Use your data story to fuel your next grant application

health workforce community

Budgeting for Small Nonprofits: Practical Strategies and Common Challenges

Presented by Nicholas A Curran, CPA, CNAP
Founder and CEO
Numbers 4 Nonprofits Inc

Numbers 4 Nonprofits®

Numbers 4 Nonprofits Inc

Managing Money with Mission

- Audited nonprofits while working at Williams Young from 2000-2003
- Self-employed since 2004
- Nonprofit CFO work began in 2006
- During 2025, our team has grown to 36 colleagues and contractors serving over 150 nonprofit clients throughout the country.

What is zero-based budgeting?

- Reverses the process of traditional budgeting by starting at $0 and adding items in, rather than using last year's budget as the baseline
- Time for reflection on what is important to fulfilling our mission
- Uses some historical perspective while asking "What do we want to do this year versus last year?"
- Requires input from all areas of the organization, including finance, programming, development, admin

Revenues

- Grants
  - Donations with Donor Restrictions – funds received in advance
  - Cost reimbursement
- Fundraising events
  - Timing of funds received
  - Year-round sponsorships
  - Tickets/silent auctions

Revenues continued

- Unrestricted contributions
  - Sources – individual, business, government, etc.
  - How are we going to achieve the stated goal?
    - Setting monthly fundraising goals and tracking against them
- Program fees
  - Are they meant to cover all costs? When were they last reviewed?
- Other sources
  - Interest income on reserves
  - Distributions from endowments – NOT INCOME

Expenses

- Personnel
  - What is important to our mission?
  - What commitments do we have with our current grants?
  - What personnel are covered directly by grant funds versus unrestricted funds?
  - What raises do we want to provide our staff?
  - What incentives, if any, do we want to consider throughout the year?
  - What are the costs of are current benefits?
    - Do we need to consider changes to the benefits we provide?

Personnel Grid

Awesome Nonprofit Inc
2026 Personnel
Created November 2025

	2,025.00	**COLA**	**Pay**	**Annual**			**Insurance**		**Life &**		**Total**
	Rate	**3%**	**Periods**	**Salary**	**FICA/SS**	**SUI**	**Health**	**Dental**	**Disability**	**Retirement**	**EE Cost**
Employee A	896.35	923.24	24.00	22,157.77	1,695.07	595.00	5,400.00	300.00	300.00	1,107.89	31,555.73
Employee B	1,170.00	1,205.10	24.00	28,922.40	2,212.56	595.00	5,400.00	300.00	300.00	1,446.12	39,176.08
Employee C	3,125.00	3,218.75	24.00	77,250.00	5,909.63	595.00	5,400.00	300.00	300.00	3,862.50	93,617.13
Employee D	1,170.00	1,205.10	24.00	28,922.40	2,212.56	595.00	5,400.00	300.00	300.00	1,446.12	39,176.08
Employee E	1,170.00	1,205.10	24.00	28,922.40	2,212.56	595.00	5,400.00	300.00	300.00	1,446.12	39,176.08
Employee F	1,552.42	1,598.99	24.00	38,375.82	2,935.75	595.00	5,400.00	300.00	300.00	1,918.79	49,825.36
Employee G	1,166.67	1,201.67	24.00	28,840.08	2,206.27	595.00	5,400.00	300.00	300.00	1,442.00	39,083.35
Employee H	2,416.67	2,489.17	24.00	59,740.08	4,570.12	595.00	5,400.00	300.00	300.00	2,987.00	73,892.20
Employee I	1,402.77	1,444.85	24.00	34,676.47	2,652.75	595.00	5,400.00	300.00	300.00	1,733.82	45,658.05
Employee J	1,126.67	1,160.47	24.00	27,851.28	2,130.62	595.00	5,400.00	300.00	300.00	1,392.56	37,969.47
Employee K	1,300.00	1,339.00	24.00	32,136.00	2,458.40	595.00	5,400.00	300.00	300.00	1,606.80	42,796.20
Employee L	704.17	725.29	24.00	17,407.00	1,331.64	595.00	5,400.00	300.00	300.00	870.35	26,203.99
				425,201.72	32,527.93	7,140.00	64,800.00	3,600.00	3,600.00	21,260.09	558,129.73

Expenses continued

- Direct Program Costs
  - Specific printing
  - Specific one-time expenses
  - Use of subcontractors
- Fundraising/Event Expenses
  - Venue
  - Catering
  - Prizes

Expenses continued

- Larger budget items
  - Occupancy – rent/utilities (or debt payments on purchased facility)
  - Insurance other than health – using broker to get competitive bid
  - Printing – can the organization anticipate its entire annual spending and go out to bid?
  - Contracted services – for audit, technology, finance, program, etc.

Other items to consider when budgeting

- Debt payments
  - In order to cover the principal portion of debt payments, we will need to budget a surplus.
- Replacement reserves
  - If we own our facility, do we have a plan for building up reserves to replace roofs, furnaces, etc?   Surplus budgeting is a must.
- Cost reimbursement grants
  - These grants are often paid 30-90 days after expenses have been incurred. How do we float those expenses in the interim? Line of credit or cash reserves?
- Pledge payments
  - Does our budgeted income include pledges that may be collected in subsequent years?
  - What is the timing of payments on past pledges?

Bring it together then compare to prior years

	Budget 2026	Projected 2025	Budget 2025	Projected Diff	2024 Actual	2023 Actual
Income						
Grants	180,000.00	150,000.00	160,000.00	-10,000.00	150,000.00	100,000.00
Fundraising	440,000.00	390,000.00	390,000.00	0.00	360,000.00	400,000.00
Donations	201,000.00	180,000.00	195,000.00	-15,000.00	170,000.00	150,000.00
Total Income	821,000.00	720,000.00	745,000.00	-25,000.00	680,000.00	650,000.00
Expenses						
Personnel	610,000.00	520,000.00	565,000.00	-45,000.00	500,000.00	443,000.00
Rent	41,000.00	39,000.00	40,000.00	-1,000.00	39,000.00	37,000.00
Office Supplies	8,000.00	8,000.00	5,000.00	3,000.00	6,000.00	5,000.00
Insurance	31,000.00	28,000.00	27,000.00	1,000.00	26,000.00	26,000.00
Program Costs	30,000.00	21,000.00	18,000.00	3,000.00	17,000.00	15,000.00
Event Expenses	89,000.00	89,000.00	77,000.00	12,000.00	80,000.00	116,000.00
Printing/Copying	10,000.00	10,000.00	11,000.00	-1,000.00	10,000.00	10,000.00
Total Expense	819,000.00	715,000.00	743,000.00	-28,000.00	678,000.00	652,000.00
Surplus Deficit	**2,000.00**	**5,000.00**	**2,000.00**	**3,000.00**	**2,000.00**	**-2,000.00**

And now that it's done . . .

	Actual	Projected	Total Projected	Annual Budget	
	Jan-Feb 2026	Mar-Dec 2026	2026	2026	Variance
Income					
4010 · Private Pay	40,000.00	161,000.00	201,000.00	205,000.00	-4,000.00
4012 · Room Rental Fees	4,471.00	20,000.00	24,471.00	21,600.00	2,871.00
4013 · Activity and Class Fees	2,978.76	15,000.00	17,978.76	11,100.00	6,878.76
4020 · Memberships	316.67	16,800.00	17,116.67	17,200.00	-83.33
4030 · COP/CIP	3,019.83	11,000.00	14,019.83	26,400.00	-12,380.17
4035 · United Way	15,000.00	80,000.00	95,000.00	95,000.00	0.00
4036 · Dane County Grant	70,000.00	231,000.00	301,000.00	303,600.00	-2,600.00
4040 · Local Government Support	0.00	197,702.00	197,702.00	197,702.00	0.00
4045 · Event Income	1,000.00	65,000.00	66,000.00	66,000.00	0.00
4050 · Contributions	12,000.00	65,000.00	77,000.00	78,000.00	-1,000.00
4060 · Interest Income	2.99	9.00	11.99	12.00	-0.01
4070 · Food Service Fees	3,019.06	12,000.00	15,019.06	18,600.00	-3,580.94
Total Income	151,808.31	874,511.00	1,026,319.31	1,040,214.00	-13,894.69
Expenses					
5000 · Employee Costs	120,966.54	600,000.00	720,966.54	716,000.00	4,966.54
5043 · Programming Expenses	880.46	3,000.00	3,880.46	3,600.00	280.46
5045 · Event Expenses	133.73	16,500.00	16,633.73	16,500.00	133.73
5150 · Supplies on Grants	912.04	4,500.00	5,412.04	5,400.00	12.04
5210 · Conferences and Training	142.00	1,000.00	1,142.00	1,000.00	142.00
5250 · Professional Fees	4,752.00	35,900.00	40,652.00	40,500.00	152.00
5255 · Technology	3,366.60	5,000.00	8,366.60	14,500.00	-6,133.40
5260 · Licenses and Fees	83.34	2,400.00	2,483.34	2,400.00	83.34
5300 · Bank and Merchant Fees	104.51	2,000.00	2,104.51	2,400.00	-295.49
5330 · Postage	241.22	3,000.00	3,241.22	3,600.00	-358.78
5340 · Telephone	1,357.46	7,425.00	8,782.46	8,925.00	-142.54
5350 · Travel/Mileage Reimbursement	982.20	5,500.00	6,482.20	6,600.00	-117.80
5410 · Food Costs	13,568.03	75,000.00	88,568.03	90,000.00	-1,431.97
5530 · Office Supplies	735.73	5,000.00	5,735.73	6,000.00	-264.27
5640 · Printing	117.08	3,000.00	3,117.08	3,600.00	-482.92
5720 · Vehicle Costs	1,505.23	15,000.00	16,505.23	18,000.00	-1,494.77
5840 · Utilities	8,053.00	30,000.00	38,053.00	36,000.00	2,053.00
5850 · Supplies	1,927.69	10,000.00	11,927.69	12,000.00	-72.31
5860 · Repairs and Maintenance	4,138.74	18,000.00	22,138.74	21,600.00	538.74
5910 · Insurance	3,767.13	18,500.00	22,267.13	22,200.00	67.13
Total Expenses	167,734.73	860,725.00	1,028,459.73	1,030,825.00	-2,365.27
Surplus (Deficit)	-15,926.42	13,786.00	-2,140.42	9,389.00	-11,529.42

THANK YOU!

If you have additional questions/concerns or would like to discuss outsourcing the financial management of your organization, please contact:

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Founder and CEO

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