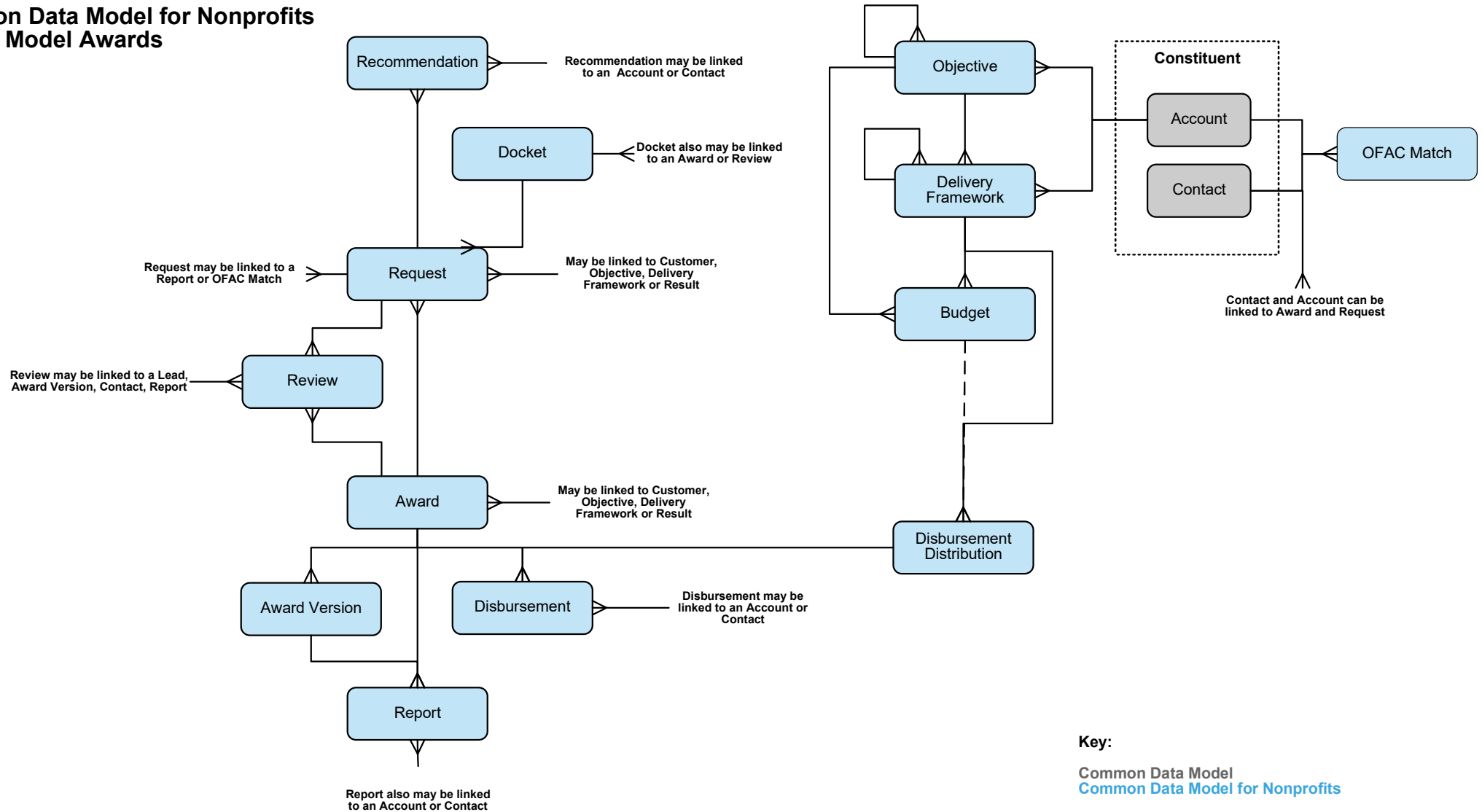


## Common Data Model for Nonprofits

### How to Model Awards



**Key:**

Common Data Model  
Common Data Model for Nonprofits

#### Awards

Community Health Foundation  
Awarded \$120,000 for Cook County  
Immunization Drive

#### Customer

Community Health Foundation  
123 Herald Street  
+1 (480) 555-0102  
www.chfoundation.org

#### Objective

1. Pediatric Health
2. Safety Education
3. Insurance Support

#### Delivery Framework

1. Health Initiatives
  - 1a. Focus Illinois USA

#### Award Version

1. Changed Amount to \$112,000
2. Changed Start Date to Dec 1
3. Changed Reporting frequency to Monthly

#### Report

1. 6 Month Progress Report
2. Milestone Status Review
3. Budget Utilization Report

#### Disbursement

1. \$28,000 Disbursement - Jan 15
2. \$28,000 Disbursement - Mar 15
3. \$40,000 Disbursement - Jun 15
4. \$16,000 Disbursement - Sep 15

#### Disbursement Distribution

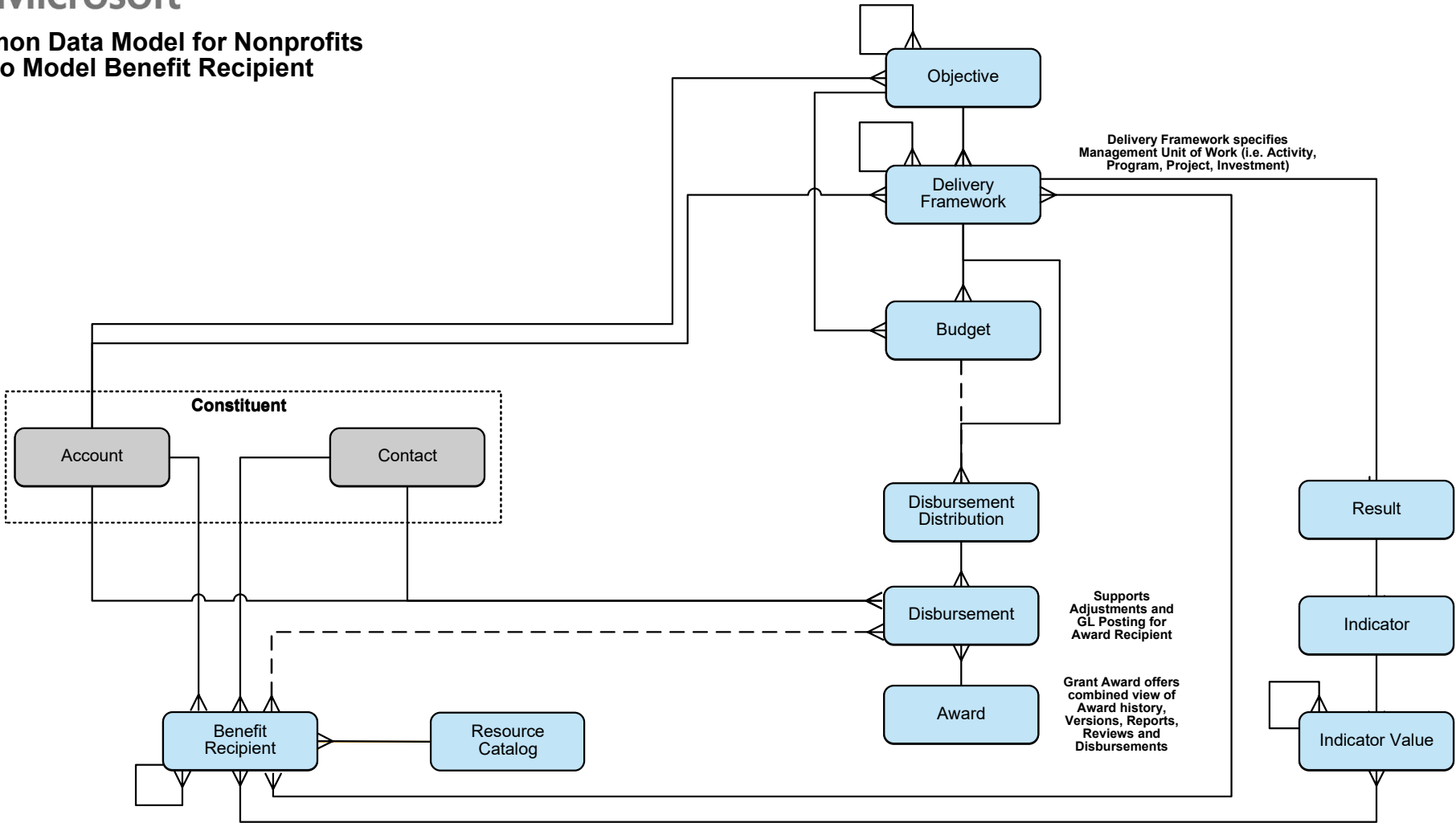
1. \$56,000 from Health Initiatives
2. \$56,000 from Focus Illinois

#### Budget

- Health Initiatives:
- \$980,000 Pediatric Health FY2019
  - \$1,200,000 Insurance Support FY2019



Common Data Model for Nonprofits  
How to Model Benefit Recipient



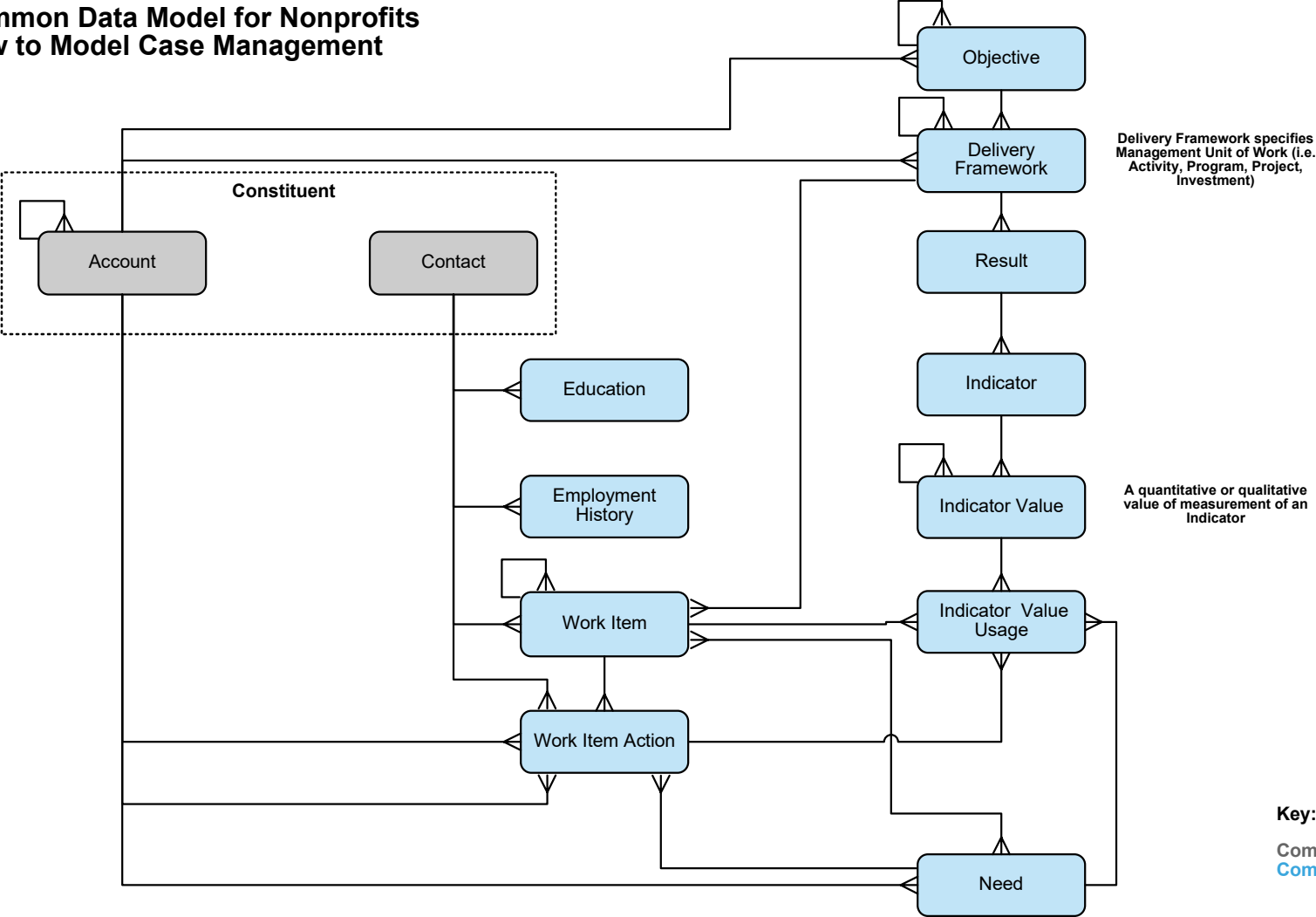
Key:  
Common Data Model  
Common Data Model for Nonprofits

Usage Scenario	Delivery Framework	Account	Contact	Disbursement	Indicator	Indicator Value	Benefit Recipient	Resource Catalog
Community Health Foundation	2019 Global Warming Monitoring	Baldwin Museum of Science	NULL	\$145000	Sea Surface Temperature	17C	Reskit Alliance of Anchorage	Delivery Partner
Awarded \$120,000 for Cook County	2019 Barba Family Food Pantry Support	NULL	Samuel Barba	\$11050	People Served	1	Petra Hale	Food Insecure
Immunization Drive	2019 Preservation of Contoso Beach	Friends of Contoso Beach	NULL	\$10000	Pounds of Debris Collected Per Mile (pd/mi)	162.3 pd/mi	Contoso Beach	Long Island Cost



# Common Data Model for Nonprofits

## How to Model Case Management



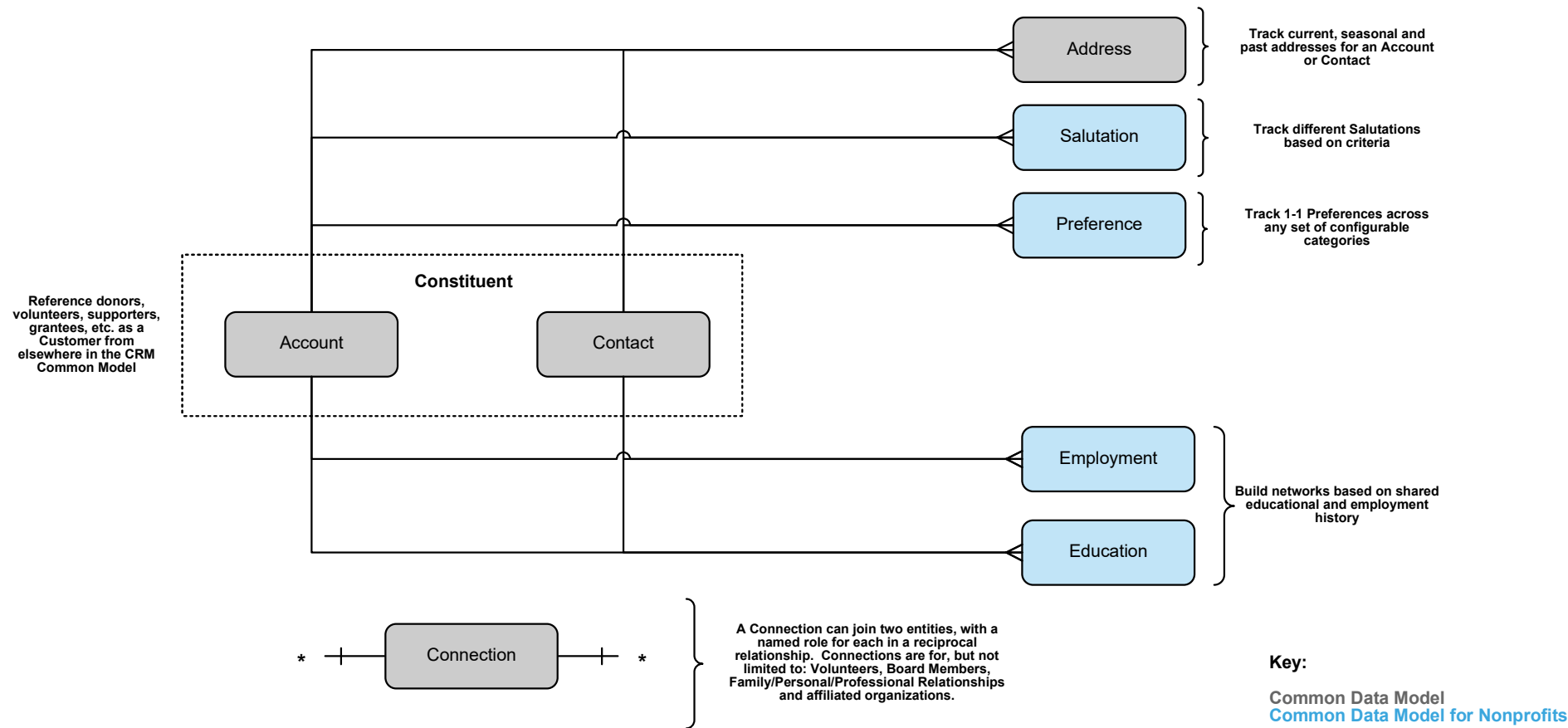
**Key:**  
Common Data Model  
Common Data Model for Nonprofits

Usage Scenario	Beneficiary	Work Item	Work Item Action	Need	Indicator
Community Counseling	Stuart Ulmer (Contact)	Ulmer's Case File	Intake; Assessments; Referral for Medication; Group Attendance		Group Attendance
Career Counseling	Bert Hair (Contact)	Bert Hair – Spring 2020	Intake; Skills Assessment; Job Skills Workshop; Skill Evaluation	Employment	Career Counseling; Skills Learned
Food Pantry	Galloway Household (Account)	Galloway Food Pickup		Food	



# Common Data Model for Nonprofits

## How to Model a Constituent



### Contact

Samuel Barba  
123 Lakeshore Drive  
+1 (480) 555-0100  
samuel@contoso.com

### Account

1. Barba Household
2. Wilcox Foundation
3. Constant Company
4. Chicago Healthy City Foundation

### Employment

1. Chairman, Constant Company
2. EVP Operations, Kellogg & Pratt

### Preference

1. Volunteer Roles: Fundraiser Host, Outreach
2. Impact Interest: Childhood Education
3. Theater Interest: Sherwin, Orchestra
4. Shirt Size: Large
5. Email Preference: Based on Interest
6. Annual Report: Electronic

### Address

1. 123 Lakeshore Drive, +1 (480) 555-0101
2. 200 Pleasant Ln, +1 (480) 555-0100

### Education

1. MBA, Northwestern University, 1985
2. BA History, Brown University, 1978

### Salutation

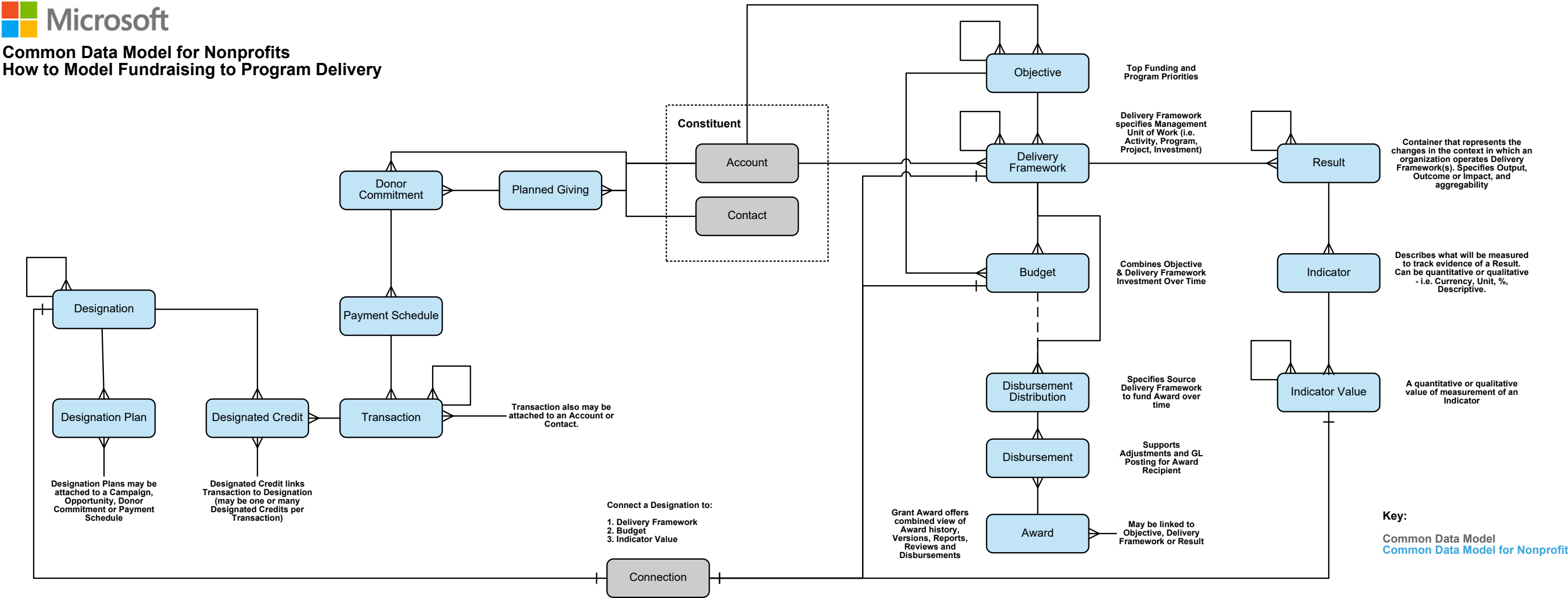
1. Mr. & Mrs. Samuel Barba
2. Dear Chairman Barba & Ms. Doucette
3. Dear Samuel,

### Connection

1. Barba Corporation - Lundgren Foundation = Corporate Foundation
2. Consoto Company - Barba Corporation: Subsidiary
3. Samuel - Clare = Sibling
4. Samuel - Diana = Client-Attorney
5. Samuel - Petra = Business Partner



Common Data Model for Nonprofits  
How to Model Fundraising to Program Delivery



**Account**  
1. Barba Household  
2. Wilcox Foundation  
3. Constant Company  
4. Chicago Healthy City Foundation

**Designated Credit**  
For Sustainer Gift:  
1. \$250 for Community Health  
2. \$250 for Children's Health  
3. \$500 for General Fund

**Lead**  
1. Request for Information  
2. Contact Info Request  
3. Contact Us

**Donor Commitment**  
1. In-Kind Gift  
2. \$1,000 Monthly Sustainer Donation  
3. \$500 Donation

**Budget**  
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

**Disbursement**  
1. \$28,000 Disbursement - Jan 15  
2. \$28,000 Disbursement - Mar 15  
3. \$40,000 Disbursement - Jun 15  
4. \$16,000 Disbursement - Sep 15

**Indicator**  
1. % of children immunized under 10 years old  
2. Total # of immunizations delivered

**Campaign**  
1. 2018 HNWI Outreach Campaign  
2. FY19 November Annual Campaign

**Designation**  
10000 Health  
10844 Community Health  
10876 Children's Health  
20000 General Fund

**Payment Schedule**  
1. In-Kind Gift Transfer on DATE  
2. \$1,000 USD Monthly Credit Card Charge  
3. \$500 Check

**Objective**  
1. Pediatric Health  
2. Safety Education  
3. Insurance Support

**Disbursement Distribution**  
1. \$56,000 from Health Initiatives  
2. \$56,000 from Focus Illinois

**Award**  
Community Health Foundation Awarded  
\$120,000 for Cook County Immunization Drive

**Indicator Value**  
1. Date: 12/1/2018, Value: 22%  
2. Date: 12/1/2018, Value: 12,242

**Contact**  
Samuel Barba  
123 Lakeshore Drive  
+1 (480) 555-0100  
samuel@contoso.com

**Designation Plan**  
1. 25% to Community Health  
2. 25% to Children's Health  
3. 50% to General Fund

**Transaction**  
1. In Kind Gift Transfer valued at \$112,790  
2. \$1,000 Charge Card Transaction  
3. \$500 Debit Checking Account #12345

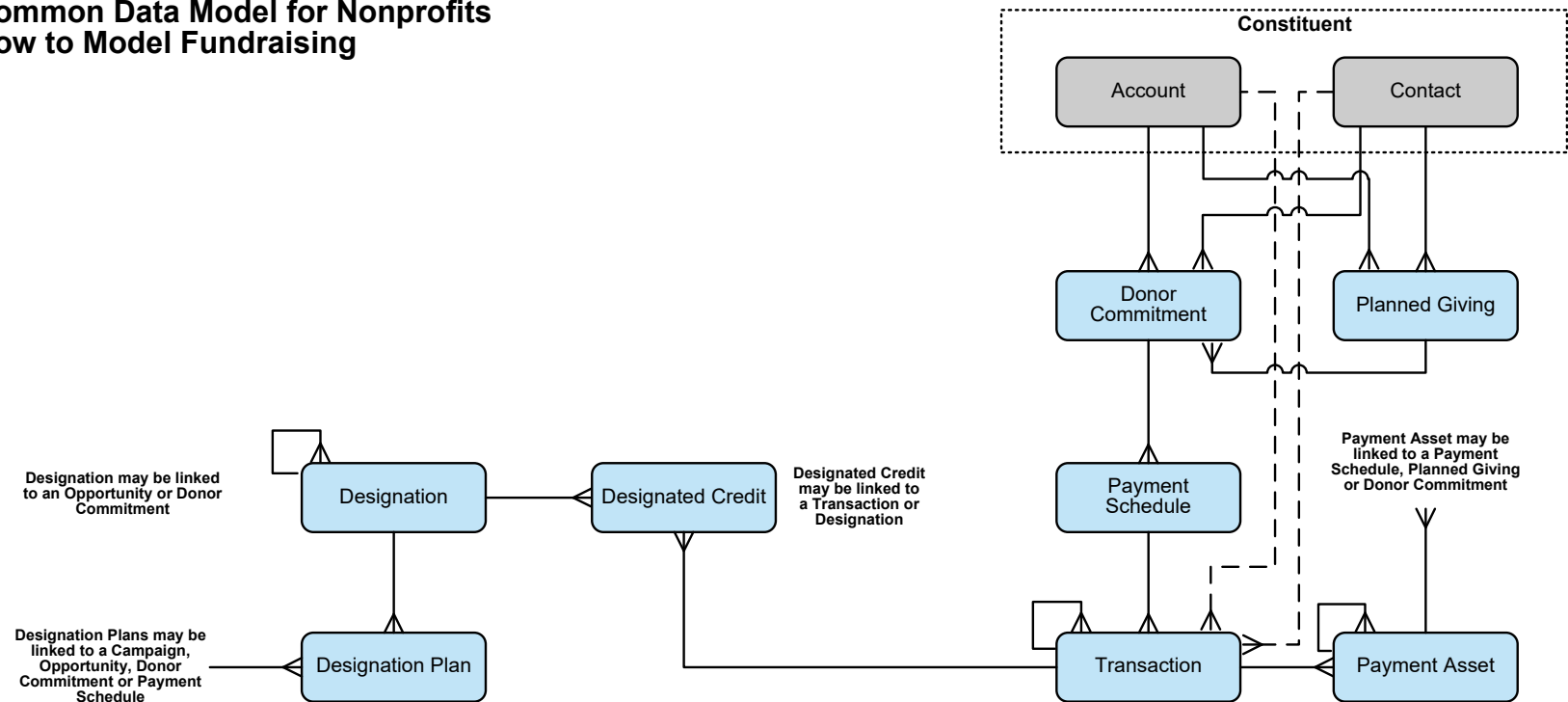
**Result**  
1. Contribute to improving Cook County Immunization Rate

**Delivery Framework**  
1. Health Initiatives  
1a. Focus Illinois USA



# Common Data Model for Nonprofits

## How to Model Fundraising



**Account**

- 1. Barba Household
- 2. Raleigh Foundation
- 3. Constant Company
- 4. Chicago Healthy City Foundation

**Customer**

Samuel Barba  
123 Lakeshore Drive  
+1 (480) 555-0100  
samuel@contoso.com

**Designation Plan**

- 1. 25% to Community Health
- 2. 25% to Children's Health
- 3. 50% to General Fund

**Payment Schedule**

- 1. In-Kind Gift Transfer on DATE
- 2. \$1,000 USD Monthly Credit Card Charge
- 3. \$500 Check

**Key:**

Common Data Model  
Common Data Model for Nonprofits

**Campaign**

- 1. 2018 HNWI Outreach Campaign
- 2. FY19 November Annual Campaign

**Designated Credit**

For Sustainer Gift:  
1. \$250 for Community Health  
2. \$250 for Children's Health  
3. \$500 for General Fund

**Donor Commitment**

- 1. In-Kind Gift
- 2. \$1,000 Monthly Sustainer Donation
- 3. \$500 Donation

**Transaction**

- 1. In Kind Gift Transfer valued at \$112,790
- 2. \$1,000 Charge Card Transaction
- 3. \$500 Debit Checking Account #12345

**Contact**

Samuel Barba  
123 Lakeshore Drive  
+1 (480) 555-0100  
samuel@contoso.com  
(A Contact may or may not be linked to an Account)

**Designation**

10000 Health  
10844 Community Health  
10876 Children's Health  
20000 General Fund

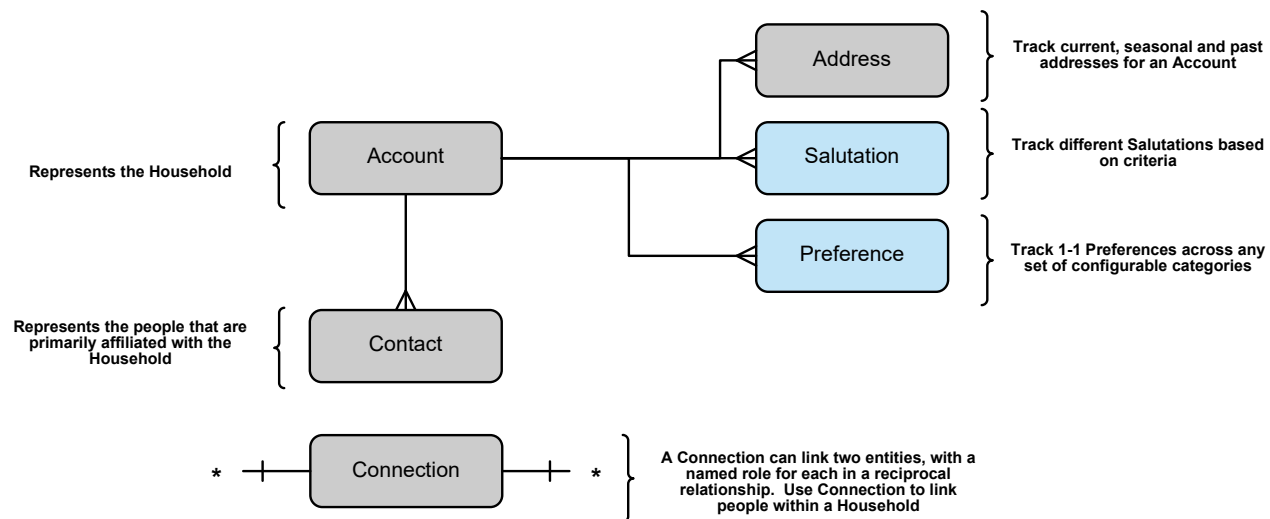
**Lead**

- 1. Request for Information
- 2. Contact Info Request
- 3. Contact Us



## Common Data Model for Nonprofits

### How to Model a Household



**Account**  
Barba Household

**Address**  
1. 123 Lakeshore Drive, +1 (480) 555-0100  
2. 200 Pleasant Ln, 1 (480) 555-0101

**Connection**  
1. Delia - Samuel = Partner  
2. Samuel - Margret = Attorney-Client

**Contact**  
Samuel Barba  
123 Lakeshore Drive  
+1 (480) 555-0100  
samuel@contoso.com  
(A Contact may or may not be linked to an Account)

**Salutation**  
1. Ms Delia Schroeder & Mr. Samuel Barba  
2. Dear Samuel and Ms.Schroeder

**Preference**  
1. Impact Interest: Childhood Education  
2. Theater Interest: Sherwin, Orchestra  
3. Email Preference: Based on Interest  
4. Annual Report: Electronic

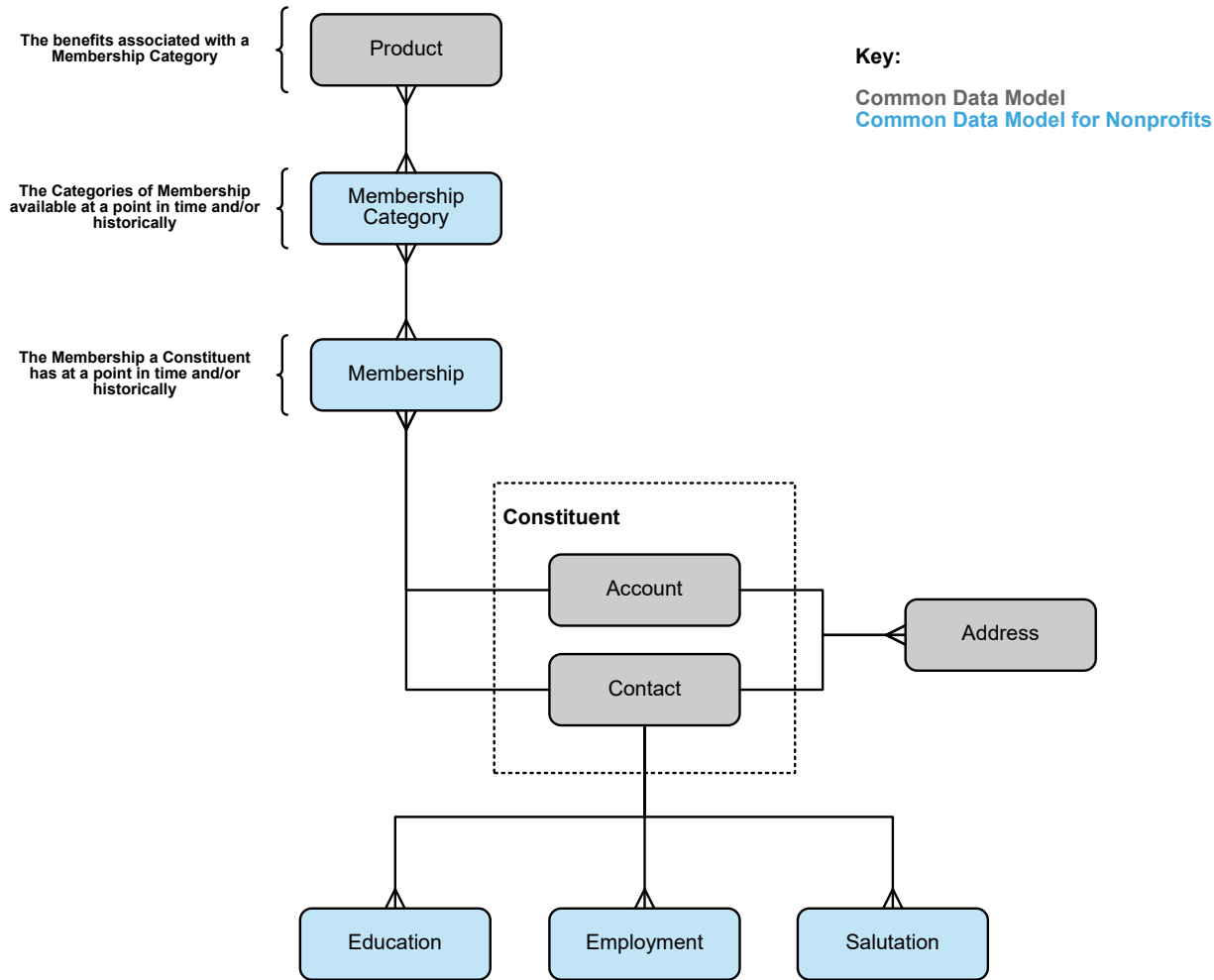
#### Key:

Common Data Model  
Common Data Model for Nonprofits



# Common Data Model for Nonprofits

## How to Model Membership



### Contact

Samuel Barba  
123 Lakeshore Drive  
+1 (866) 555-0100  
samuel@contoso.com

### Account

1. Barba Household
2. Wilcox Foundation
3. Constant Company
4. Chicago Healthy City Foundation

### Employment

1. Chairman, Constant Company
2. EVP Operations, Kellogg & Pratt

### Membership Category

Silver Individual Membership  
Renewal

### Membership

Silver Member  
Samuel Barba  
Start Date: January 1, 2019  
End Date: December 31, 2019

### Address

1. 123 Lakeshore Drive, +1 (866) 555-0100
2. 200 Pleasant Ln, +1 (866) 555-0101

### Education

1. MBA, Northwestern University, 1985
2. BA History, Brown University, 1978

### Salutation

1. Mr. & Mrs. Barba
2. Dear Chairman Barba & Ms. Schroeder
3. Dear Samuel,

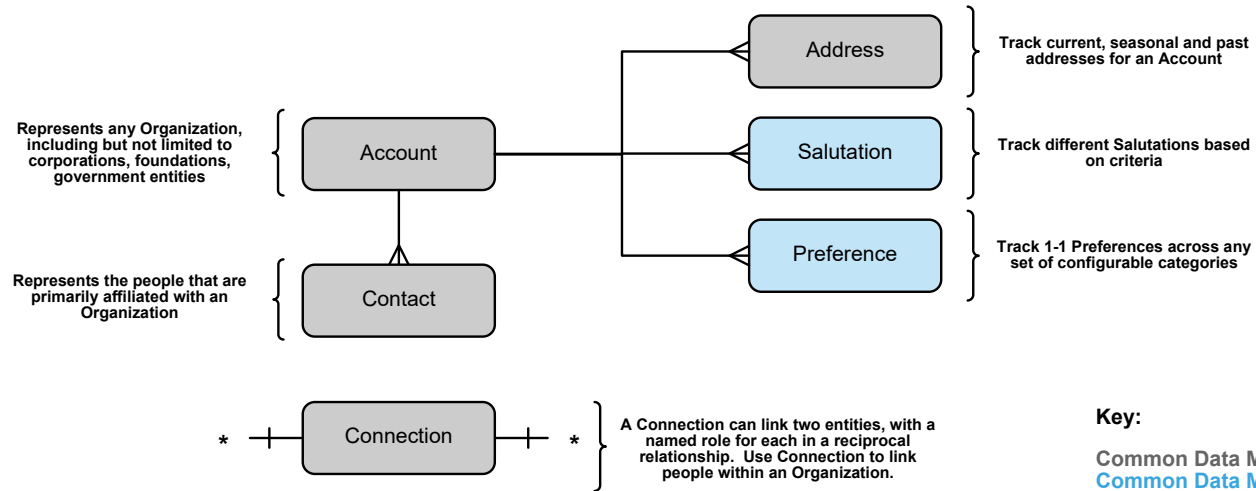
### Product

Membership Benefits  
Individual Membership  
12 months  
\$25.00



## Common Data Model for Nonprofits

### How to Model an Organization



#### Key:

Common Data Model  
Common Data Model for Nonprofits

#### Account

1. Barba Corporation
2. Lundgren Foundation
3. Contoso Company
4. Chicago Healthy City Foundation
5. Anton School

#### Contact

Samuel Barber  
123 Lakeshore Drive  
+1 (480) 555-0100  
samuel@contoso.com

#### Address

1. 123 Lakeshore Drive, +1 (312) 555-0100
2. 200 Pleasant Ln, +1 (610) 555-0101

#### Salutation

1. Dear Barba Corporation
2. Lundgren Foundation

#### Preference

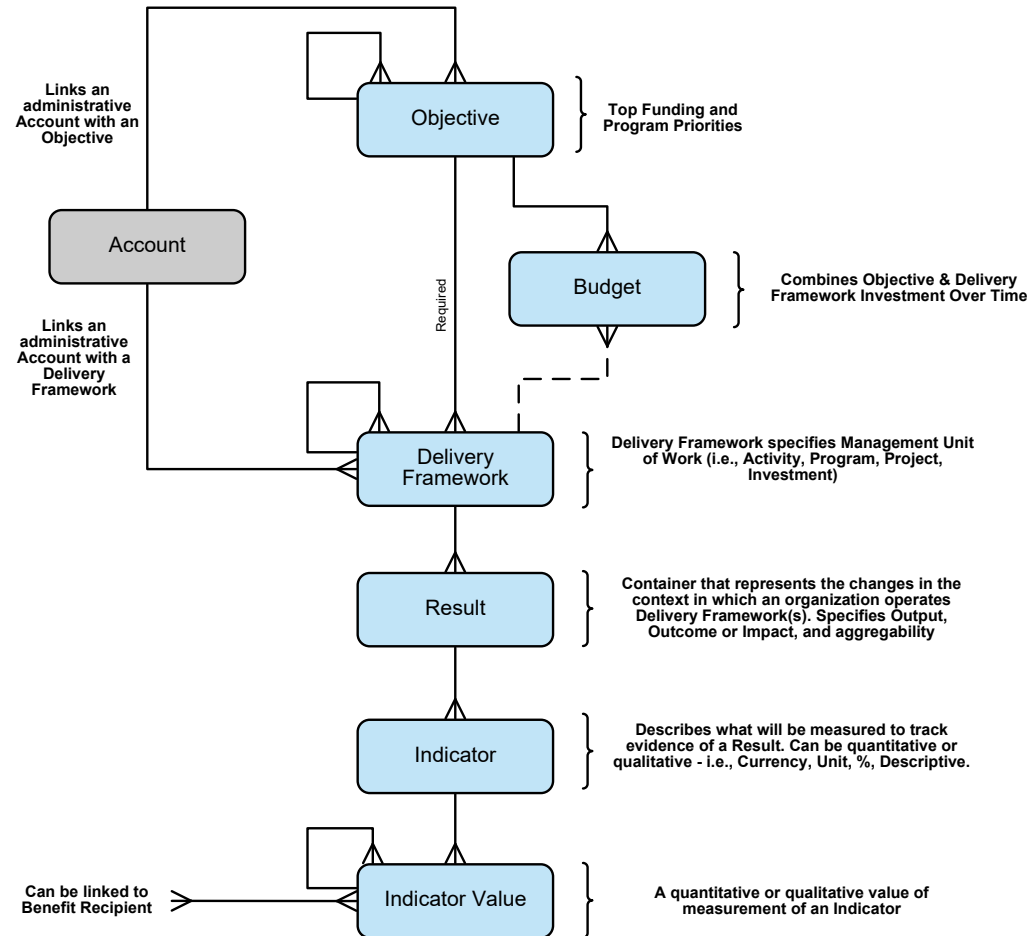
1. Impact Interest: Childhood Education
2. Email Preference: No Email
3. Annual Report: Electronic Delivery

#### Connection

1. Barba Corporation - Lundgren Foundation: Corporate Foundation
2. Contoso Company - Barba Corporation: Subsidiary

## Common Data Model for Nonprofits

### How to Model Program Delivery & Results



#### Objective

1. Pediatric Health
2. Safety Education
3. Insurance Support

#### Delivery Framework

1. Health Initiatives
- 1a. Focus Illinois USA

#### Indicator

1. % of children immunized under 10 years old
2. Total # of immunizations delivered

#### Budget

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

#### Result

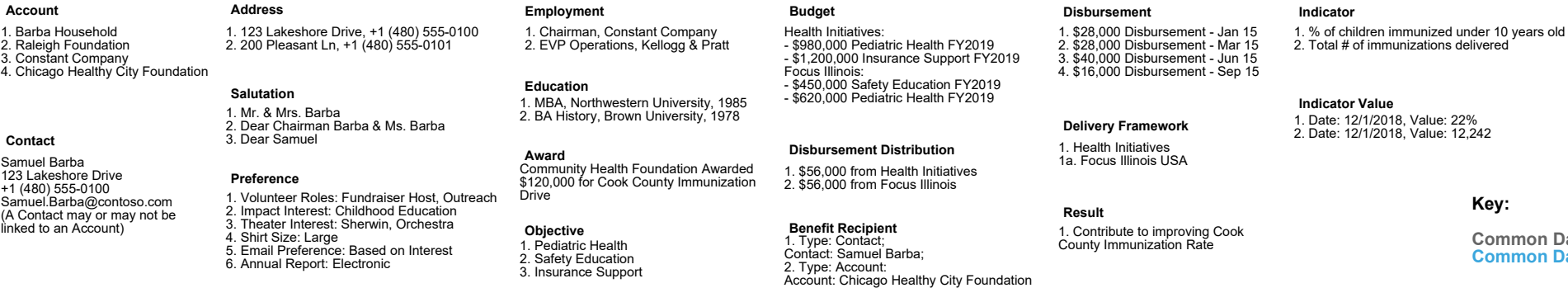
1. Contribute to improving Cook County Immunization Rate

#### Indicator Value

1. Date: 12/1/2018, Value: 22%
2. Date: 12/1/2018, Value: 12,242

#### Key:

Common Data Model  
Common Data Model for Nonprofits



## Common Data Model

# Common Data Model for Nonprofits

## How to Model Volunteer Management

Key:

Common Data Model  
Common Data Model for Nonprofits

