

## TIP SHEET

# Make Your Financial Data Come Alive: 7 Tips for Creating Engaging Visualizations

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When looking at your nonprofit organization's financial statement, your eyes typically go to the bottom line. Are we on budget or not? But that number at the bottom is not the whole story.

The goal of data visualization is to help you deliver great information in a way your audience can receive it. By presenting your organization's financial data through clear and engaging graphics, your audience is more likely to understand the issue and take meaningful action.

During our webinar with William Schwab, Data Visualization Manager at Your Part-Time Controller, LLC, he provided [these seven tips for telling a clear and actionable financial story through data visualization](#).

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## Tune out the noise and turn up the story

Just like when you invite friends over for dinner, you clear out the clutter so everyone can focus on the food and conversation. Identify the story that needs to be told and remove the rest. Make it obvious where your audience should direct their attention.

2

## Use a headline to get to the point.

If your Board member arrives 10 minutes late, they should be able to look at the headline and know the key points of the data. Your headline should be short—no more than a simple sentence—and get to the crux of the issue.

3

## Help your audience interpret the information explicitly.

Include a short paragraph that gets to the point of your graphic. Highlight the main issue and why it is something that needs their attention.

4

### Always give credit.

Every graphic you create—whether it is for a Board report or an Annual Report—should include both the source of the information and credit to the person who built it. Even if the data is from your fund accounting software, your audience needs to know where it came from. You never know where your graphic might end up.

5

### Add notes to proactively address potential questions.

As you are putting together your graphic, you might know some of the questions your audience is likely to ask. For example, on your graph showing the shrinking percentage of your unrestricted funds, you know your Board will ask whether you are looking at lowering your operating costs. The notes section helps you get in front of those questions and shows you've done your due diligence.

6

### Make the full report available.

A strong graphic is not a replacement for the full financial data. Your data has a story to tell, and you can get your audience's attention with a clear and engaging graphic. But be prepared to have all the appropriate financial data ready for your stakeholders to dig into if they want to.

7

### Work with your marketing team for design best practices.

To help you streamline your processes for creating graphics, understand your brand colors and fonts. Having a consistent look and feel across all your materials appears more professional, and it keeps you from getting stuck trying to decide which color to make your lines.

## DESIGN RESOURCES

In addition to the reporting functionality native to your fund accounting system, here are tools to create engaging data visualizations:

Datawrapper.de: Create powerful charts, tables, and maps and export to PNG with a free account. The free account has a built-in color-blindness checker.

Infogram: Use the drag-and-drop tool to build a variety of charts and maps. Use their templates or upgrade to create a branded template.

Visme: A drag-and-drop tool that can help with graphs and charts as well as full reports and datasheets. Easily add your brand colors and fonts.

The Noun Project: Add icons to your graphics and explanations to help convey your message. Free to use when you cite the designer or pay a small fee for use without attribution.

Want to see how to create professional and compelling reports and dashboards in Blackbaud Financial Edge NXT®? Check out our product demonstration where we focus on the reporting capabilities of our fund accounting software.

[Watch the Demo](#)



## About the Author

William (Bill) Schwab, CPA, MBA, is the Manager of YPTC's Data Visualization Group (DVG) and has more than 20 years of finance and accounting experience. Bill joined YPTC in 2015 and worked as an Associate and Manager in the Philadelphia market before joining DVG in 2021. He started his accounting career at PricewaterhouseCoopers (PwC) before moving into industry where he served in various financial planning, corporate accounting, and internal audit roles.



Bill is a member of both the American Institute of CPAs (AICPA), the Pennsylvania Institute of CPAs (PICPA), and is a licensed Certified Public Accountant in Pennsylvania. He also holds the Chartered Global Management Accountant (CGMA) designation. Bill earned his master's degree in Business Administration from La Salle University and his bachelor's degree in Accounting and International business from Penn State University. Bill is a frequent speaker at nonprofit events and has appeared on several episodes of American Nonprofit Academy's *The Nonprofit Show*.

## About Your Part-Time Controller, LLC

Your Part-Time Controller, LLC (YPTC) is celebrating 30 years of serving nonprofits! What began in 1993 as a small enterprise by Founder and President Eric Frait has grown into a national firm of 550+ staff and 1500+ clients. YPTC does one thing and does it well—financial management for nonprofits. No matter the type, size, or location, YPTC offers valuable services to all clients, including accounting, financial reporting, data visualization, and more. Support, flexibility, and transformation mark our overall approach; we meet clients wherever they are. As a partner and strengthening agent, YPTC allows nonprofits to focus on what matters: furthering the mission of the organization. For more information, please visit our website [www.yptc.com](http://www.yptc.com).



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### About Blackbaud

Blackbaud (NASDAQ: BLKB) is the leading software provider exclusively dedicated to powering social impact. Serving the nonprofit and education sectors, companies committed to social responsibility, and individual change makers, Blackbaud's essential software is built to accelerate impact in fundraising, nonprofit financial management, digital giving, grantmaking, corporate social responsibility and education management. With millions of users and \$100 billion donated, granted, and invested through its platforms every year, Blackbaud's solutions are unleashing the potential of the people and organizations who change the world. Blackbaud has been named to Newsweek's list of America's Most Responsible Companies, Quartz's list of Best Companies for Remote Workers, and Forbes' list of America's Best Employers. A remote-first company, Blackbaud has operations in the United States, Australia, Canada, Costa Rica and the United Kingdom, supporting users in 100+ countries. Learn more at [blackbaud.com](http://blackbaud.com) or follow us on twitter LinkedIn, Instagram and Facebook.

