San Antonio Area Foundation and UTSA Certificate Program Fall 2025 (Hybrid)

Data & Innovation Management 101 For Nonprofits

Program Orientation – August 22, (virtual) 10:00 a.m. to 11:30 a.m.
Area Foundation Staff
This session introduces participants to the program. We will share how to get the most out of the program as well as requirements for earning the certificate of completion and optional CEUs. We will provide an overview of the individual sessions and a demo about using the Learning Management System (LMS) to access PowerPoints and resources. Registered participants will receive the link to join via email.

Excel 101 & 102 – September 5, (virtual), 9:00 a.m. to 12:00 p.m
Instructor: Ashwin Malshe, Ph.D., UTSA Associate Professor of Marketing, Chair, Ph.D. Program Committee, Luther Brown Fellow
This comprehensive 3-hour workshop introduces participants to foundational and intermediate Microsoft Excel skills essential for professional environments. Participants will progress from basic spreadsheet navigation to powerful data analysis techniques, with hands-on exercises reinforcing each concept. The curriculum bridges fundamental operations with more advanced functions and features, enabling attendees to efficiently manage, analyze, and visualize data. By the conclusion, participants will possess practical Excel skills applicable to various professional scenarios.

Objectives:
By the end of this course, learners will be able to:

- Excel Basics: Navigate the Excel interface, create and save workbooks, and perform basic data entry.
- Intermediate Data Management: Manage and organize data effectively using sorting, filtering, and tables.
- Functions and Formulas: Utilize essential functions and formulas to perform calculations and automate tasks.
- Data Visualization: Create charts and graphs to visually represent data, enhancing analysis and presentation skills.

Required Resources
- Computer with Microsoft Excel 2016 or newer installed
- Basic computer literacy (ability to navigate files and folders)
- Note-taking materials
- Sample datasets will be provided
- Optional: Personal data files for practice during open lab time

Storytelling for Nonprofit Leaders & Creating Summary Reports with Data – September 5, (virtual), 1:30 p.m. to 4:30 p.m.
Instructor: Ashwin Malshe, Ph.D., UTSA Associate Professor of Marketing, Chair, Ph.D. Program Committee, Luther Brown Fellow

This course is specifically designed to help leaders become more data aware – to expand their knowledge and understanding of the properties of data, the strategies along with the common pitfalls in looking at data analytically, and the opportunities that can arise when considering data in new and novel ways. This workshop will also expose participants to data visualization techniques, understanding how data can be utilized effectively to tell a 'story'.

Objectives:

By the end of the session participants will know how to better utilize the data they handle to make more informed and data-driven decisions.

Qualitative vs. Quantitative Data—Data Collection through Surveys and Other Tools/ Creating Data on a Shoestring Budget – September 12 (in-person), 9:00 a.m. to 12:00 p.m.
Instructor: Jihye Jung, Ph.D., Assistant Professor of Marketing, University of Texas at San Antonio

Data is a powerful tool, but finding the right data can be challenging. This course provides a practical introduction to both primary and secondary data collection. Participants will learn how to design effective online surveys using platforms like SurveyMonkey and Qualtrics to gather insights relevant to their needs. They will also explore publicly available secondary data sources, including government and community-based resources, and learn how to navigate them efficiently. Additionally, the session will include a hands-on opportunity to locate and examine a local dataset from San Antonio. Designed for non-technical learners, this course emphasizes practical, actionable skills that can be applied immediately.

Objectives:
By the end of this course, participants will be able to:
- Design and distribute effective online surveys using SurveyMonkey or Qualtrics.
- Identify and navigate publicly available secondary data sources relevant to their work
- Familiarized with local data sources to support decision making

Required Resources:
- SurveyMonkey or Qualtrics account (The specific platform will be announced later)
- Microsoft Excel for data exploration

Innovation Process Management for Non-Profit Leaders – September 12 (in-person), 1:30 p.m. to 4:30 p.m
Instructor: Laural Logan-Fain, Ph.D., Vice President of Talent Management, Ladies Professional Golf Association (LPGA)

Through this course, participants will have the opportunity to hone their innovation skills and learn how to identify successful opportunities triggered by changes in technology, legal and/or regulation shifting or preferences of those they serve, execute targeted strategies that turn unmet organizational and/or client needs into actionable innovative solutions, and generate and valuate ideas on an individual level through design thinking innovation processes and similar methodologies. Leaders will leave this class with a better understanding of the processes to foster innovation and creativity within their organization and strategies to develop a culture that embraces change.

Objectives:
By the end of this course, participants will be able to:

- Recognize the key concepts of innovation and understand how innovation and the rate of change in the technological world is impacting the work industry, and more broadly, the world.
- Engage in an intentional practice of cultivating a growth-oriented mindset through the application of innovative thinking.
- Evaluate and practically apply design thinking methodology as an innovative strategy that can be utilized to provide needed solutions for your professional work and personal life.

Required Resources:
- Miro account (https://miro.com ; sign up and create a profile; free to create a profile and use this platform; need to have accessible for in-class activities)

- Sprint (provided as e-book)
- Resources:
    - Sprint Toolkit: https://designsprintkit.withgoogle.com
    - Sprint Site with Resources: https://www.thesprintbook.com
    - IDEO Design Thinking Toolkit for Educators: https://www.ideo.com/post/design-thinking-for-educators

AI for Nonprofits – September 26 (in-person), 9:00 a.m. to 12:00 p.m.
Instructor: Sue Hum, Ph.D., Professor of English, University of Texas at San Antonio

This course is designed to help nonprofit leaders and staff leverage generative AI tools, such as Copilot and ChatGPT, to enhance their data visualization and effective storytelling capabilities. Storytelling is essential for nonprofits to connect with audiences, inspire action, and demonstrate impact. By the end of the session, attendees will be equipped with the knowledge and skills to utilize AI for data storytelling in strategic nonprofit communication to advance missions and demonstrate impact.

Objectives
1. **Understand Generative AI Tools**: Learn about generative AI tools and their applications in nonprofit data visualization and storytelling.
2. **Enhance Data Visualization**: Learn how generative AI can support data visualization.
3. **Master Data Storytelling**: Develop practical skills for telling impactful stories with data to make reports and presentations more engaging and persuasive.

Pre-read/Material (To be shared 2 weeks before the workshop)
- **AI Tools Overview**: Reviews popular generative AI tools such as Copilot, ChatGPT, and Dall-E.
- **Data Visualization Techniques**: Guide of effective data visualization in the nonprofit context.
- **Storytelling with Data**: Describes the importance of data storytelling for nonprofits and how to blend powerful stories with data to advance their missions.