

San Antonio Area Foundation and UTSA Certificate Program 2026

Data & Innovation Management 101 for Nonprofits

Classes meet at the Area Foundation on Fridays, 9:00 a.m. to 4:30 p.m., with a break for lunch.

Program Orientation Friday, August 21, 10:00 a.m. to 12:00 p.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 on 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 4, 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 data analysis techniques, with hands-on exercises reinforcing each concept. The curriculum bridges fundamental operations with 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 using sorting, filtering, and tables.
- Functions and formulas: Use essential functions and formulas to perform calculations and automate tasks.
- Data visualization: Create charts and graphs to visually represent data, enhancing analysis and presentation.

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 with Data for Nonprofit Leaders September 4, 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 participants 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, data-driven decisions.

Qualitative vs. Quantitative Data | Creating Data on a Shoestring Budget, September 11, 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 relevant insights. They will also explore publicly available secondary data sources, including government and community-based resources, and learn how to navigate them efficiently. The session includes 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 and Qualtrics.
- Identify and navigate publicly available secondary data sources relevant to their work.
- Become familiar with local data sources to support decision-making.

Required Resources

- Qualtrics account (the specific platform will be announced later)
- Microsoft Excel for data exploration

AI for Nonprofits September 11, 1:30 p.m. to 4:30 p.m.

Instructor: Sue Hum, Ph.D., Professor of English, University of Texas at San Antonio

This course helps nonprofit leaders and staff leverage generative AI tools (such as Copilot and ChatGPT) to enhance data visualization and storytelling. Storytelling helps nonprofits connect with audiences, inspire action, and demonstrate impact. At the end of the session, attendees will be equipped to use AI for data storytelling in strategic nonprofit communication to advance missions and demonstrate impact.

Objectives

- Understand generative AI tools: Learn about generative AI tools and their applications in nonprofit data visualization and storytelling.
- Enhance data visualization: Learn how generative AI can support data visualization.
- 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 to 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 missions.

Innovation Process Management for Nonprofit Leaders September 25, 9:00 a.m. to 12:00 p.m.

Instructor: Laural Logan-Fain, Ph.D., Vice President of Talent Management, Ladies Professional Golf Association (LPGA)

Through this course, participants will hone innovation skills and learn how to identify opportunities triggered by changes in technology, legal and regulatory shifts, or evolving preferences of those they serve. Participants will practice executing targeted strategies that turn unmet organizational and client needs into actionable innovative solutions and generate and evaluate ideas through design thinking and related methodologies. Leaders will leave with a better understanding of processes to foster innovation and creativity, and strategies to develop a culture that embraces change.

Objectives

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

- Recognize key concepts of innovation and understand how the rate of technological change is impacting work and the broader world.
- Engage in intentional practice to cultivate a growth-oriented mindset through the application of innovative thinking.
- Evaluate and apply design thinking methodology as an innovation strategy to address professional and personal challenges.

Required Resources

- Miro account (<https://miro.com>; sign up and create a profile; free to create a profile and use this platform; needed for in-class activities)
- Sprint (provided as an e-book)
- 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>