TABLEAU FOR NON-PROFITS

WHAT IT IS

Tableau is a **data visualization software** featuring tools and resources needed to turn data into valuable and actionable insights. By using Tableau, organizations can create compelling visual stories to engage their communities and maximize the potential of their data to make better-informed decisions.

FEATURES AND BENEFITS

▷ **Intuitive user interface:** Tableau's drag-and-drop functionality and built-in mathematical formulas make it easy to create custom charts and graphs that make data more comprehensible. There's no coding required!

▷ **Data stories:** You can tell your data story through a wide range of creative options including comparisons, ranking, correlation, distribution and chronological data trends.

▷ **Data source compatibility:** Tableau can access data from multiple sources such as spreadsheets, relational databases and Google Analytics, allowing you to streamline processes.

▷ **Impact reporting:** Create timely and current progress reports to demonstrate the impact of your work to stakeholders and funders

▷ **Collaboration and sharing:** Share data and visualizations in real-time for live collaboration

HOW YOU'LL BENEFIT

- Tableau offers discounted license pricing for non-profits on [Tableau creator](#) with access to several [Tableau products](#). This includes [Tableau Prep](#), a tool used to clean and organize your data and connect to other data connectors.

- Smaller nonprofits with limited budgets can receive [donated Tableau licenses](#) from licensed distribution partners.

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GETTING STARTED

Step 1: **Check your eligibility to receive a donated license**

- To be eligible to receive a donated license, an organization must:
  - Be officially recognized as a tax-exempt organization in one of the countries listed.
  - Operate with an annual budget under $5 million (or equivalent in local currency).
  - Not be a school, college, mutual organization, healthcare organization or government agency.
  - Not be a religious organization incorporated exclusively for the promotion of the religion.

Step 2: **Set up your Tableau account**

  - Visit tableau.com/foundation/license-donations and follow instructions to request a donated license.
  - Once your request is approved, you will receive an email with instructions for obtaining and activating your license.

BEST PRACTICES FOR ANALYZING DATA WITH TABLEAU

▷ **Define your objectives:** Begin with a well defined set of goals and objectives. This helps to focus your analysis on the problem it needs to solve.

▷ **Involve stakeholders early in the process:** Engage key stakeholders and collaborate with users in the design of dashboards to align your analysis with goals and objectives.

▷ **Prioritize key metrics:** Concentrate on the most relevant metrics and avoid unnecessary analysis of irrelevant data.

▷ **Select the right visuals:** Choose visualization types that effectively represent your data and convey the insights you want to share.

▷ **Iterate and refine:** Continuously monitor, evaluate and improve your dashboards through feedback processes. Be sure to refine your approach as you gain new insights!

LEARN MORE WITH THESE ADDITIONAL TOOLS AND RESOURCES!

- Get started with Tableau desktop
- Tableau products resources page
- Plans and pricing
- Tableau for non-profits
- Free training videos
- Best practices for effective dashboards