

# The small nonprofit guide to technology

Technology that empowers small nonprofits to make a big impact



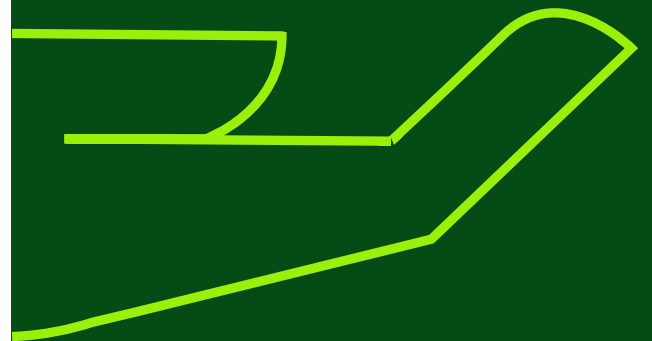
## Accelerate your mission with free technology grants and innovative, secure solutions

When you're doing whatever it takes to achieve the best impact in the most direct manner, technology can help. By simplifying many everyday tasks, you can free up time for engaging with people and charting your path forward. The right technology tools can help you boost fundraising, connect with donors, volunteers, and constituents, and accomplish more with your resources.

From empowering staff members to do their work anywhere, anytime, to managing donors and delivering programs, software and devices from Microsoft allow you to shorten the distance between envisioning and realizing your goals.

In this guide, you'll find an overview of some of our most useful solutions to help you achieve your mission, including:

- Capabilities snapshot
- Common usage scenarios
- Best next steps
- Information about Microsoft grants, discounts, and offers



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# Tools to empower your team

Microsoft 365 lays the foundation for everything your team members need as they do their jobs and engage with constituents, volunteers, and board members. With Microsoft 365 you can:

- Chat, call and host meetings with Microsoft Teams
- Create documents, share, and collaborate with familiar applications such as Word, Excel, and PowerPoint
- Connect via email and calendar with Outlook
- Store files securely in the Microsoft Cloud with OneDrive
- Access anytime online and phone support

**"The innovative solutions that we implemented throughout COVID-19 were all possible because we kept our incredible team connected using Teams and Microsoft 365. Ultimately, Cahoots saved 41 percent of its annual revenue using Microsoft tools to help save on travel costs, meetings, and training. We also avoided loss of revenue by giving everyone the tools to work effectively from home."**

Jess Karlsson, Chief Executive Officer, Cahoots

[Read the full story here](#)

## What you can accomplish with Microsoft 365

When is Microsoft 365 the right set of tools for driving your mission? Here are typical scenarios where it can make a difference:



Enable staff members at all technology skill levels to be productive wherever they work—in an office, from home, on-the-go, or even when offline.



Create, update, and manage schedules for staff and volunteers.



Create, share, co-author, and safeguard documents, presentations, spreadsheets, and other files.



Connect and communicate with team members, constituents, and donors anywhere.



Have spontaneous and scheduled conversations and meetings, supported by documents and files.



Create surveys and polls to collect feedback.



Host, join, and record conference calls, webinars, and online events.



Connect with people using telephony, using new phone numbers or migrating your existing lines.

# Making the right choice

Microsoft 365 offers several advantages over what Google offers. Let's compare:

Microsoft 365	Google
One platform integrating meetings, calls, email, chat, productivity apps, telephony, and more	More disconnected experience with workflows pushed to separate apps and browser tabs
Comprehensive, powerful, modern suite of productivity apps and capabilities	Fragmentation and costs associated with requiring third-party products to close functionality gaps
Real-time, cloud-enabled collaboration online and on mobile devices, using the full desktop versions of Microsoft 365 app	Apps lack full-size desktop versions with rich features, which can limit how users get work done
Manage your nonprofit with a single solution that reduces the number of apps you need	Increased management time and complexity to integrate different third-party applications
Built-in AI to help simplify frequent tasks, improve writing and presentation quality, and streamline email inbox management	More rudimentary, efficiency-focused intelligence capabilities
Control who and when someone has access to your nonprofit information with security groups and custom permissions	No granular access control policies to apps based on attributes such as user identity, location, security status, and IP address

## Next steps

If you're interested in putting Microsoft 365 to work, you can:

- Watch [demo videos](#) on how to schedule and engage with volunteers, secure your documents, and host webinars.
- Read the e-book [Crash Course in Microsoft 365 Business Premium for Nonprofits](#).
- Learn [How to run effective remote meetings with Microsoft Teams](#).

## Microsoft 365 grants and discounts

Microsoft 365 Business Basic is free for up to 300 users. Microsoft 365 Business Standard runs \$3.00 (USD) per user/month. Microsoft 365 Business Premium, our recommended solution for small nonprofits, delivers advanced security functionality at an excellent value—it's free for up to 10 users and costs \$5.50 (USD) per user/month for additional users.

[Explore Microsoft 365 grants and discounts](#) >

"Microsoft Teams is so easy to access. We have Members throughout the country of different ages and different stages of sight loss. And they can all connect to Teams. This technology takes us to a better place. My outlook is now very positive, because I can do things that I did before."

Nick Barber  
Member, Blind Veterans UK

[Read the full story here](#)

# Trusted security to support your mission

Rely on the security built into Microsoft 365 and Surface hardware to keep users, applications, and data safe, without compromising on ease-of-use or productivity. Numerous software and hardware data protection features enable everyone to maintain strong security internally and externally:

- [Microsoft 365 Business Premium](#) automatically protects email against spam and malware. Staff members can use efficient options to protect files they create and share, avoid accidental sharing, and prevent impersonation or phishing attempts.
- [Microsoft Surface laptops and tablets](#) offer [multiple layers of security](#) at every level of the devices' hardware, firmware, operating system, and user interactions.
- [Microsoft Defender for Business](#), part of Microsoft 365 Business Premium, helps you protect your devices by detecting and mitigating malware, viruses, and other threats.

## Surface for nonprofits offerings

Your organization can receive a discount on [select Surface devices](#). Explore grants and discounts:

[Microsoft 365](#) > [Surface](#) >

## Security that fits how you work

The security features in Microsoft 365 and in Surface laptops and tablets protect sensitive data so you can focus on what matters to achieve your goals. They help you:



Prevent team members from inadvertently or intentionally sharing documents and files.



Control individually and at a group level who can access your information and digital resources.



Safeguard staff members and their digital workspaces, no matter their location or what device they use—while managing security with centralized efficiency.



Give people access to files, applications, and resources only as they need it to do their jobs or work with constituents and donors.



Provide safe meeting environments with highly secure file sharing for team members working with donors, the board, or volunteers.



Ensure consistent, stringent security with automated and easily configurable functionality.

Other productivity technology providers may require you to acquire and install third-party apps or upgrade to more expensive plans to approximate the same level of security.

## Next steps

Cybersecurity threats and risks are always evolving, but you can stay ahead of them with secure solutions and expert guidance. To bolster your security posture, you can:

- Use tools and resources available through the [Microsoft Security Program for Nonprofits](#).
- [Learn more about the security features](#) that are part of Microsoft 365.



# Operate your nonprofit affordably and securely in the cloud

Azure, Microsoft's public cloud computing platform, empowers you to reliably deliver applications, information, and content to any staff member, donor, constituent, board member, or partnering organization. At the same time, you can keep administrative tasks and expenses to a minimum.

With the virtually unlimited computing power and capacity of the Azure cloud, you never need to worry about flagging application performance, restricted processing capability, or limited storage space as your organization grows. Backed by a worldwide network of state-of-the-art data centers, Azure infrastructure helps nonprofits maintain business continuity and recover quickly from disasters.

By transitioning current server and system workloads to Azure, you can reduce both IT administrative tasks and the costs of operating and upgrading server, storage, and networking hardware. Following your move to the cloud, you only pay for capacity you actually use. If you keep certain applications on-premises, you can manage them efficiently with Azure hybrid and multicloud tools.

## How Azure helps you move forward

How can the Azure cloud help you power your purpose? Here are a few examples:

- Reduce the costs of owning and managing technology, and reallocate funds to support your mission.
- Drive growth with confidence—the technology will support any number of users, applications, and activities.
- Host a website for your organization and fine-tune it as you see how visitors engage.
- Advance projects and campaigns with volunteers, constituents, and donors anywhere, under almost any conditions.
- Simplify reporting and compliance with financial and regulatory mandates with highly secure and efficient sharing of information in the countries where you operate.

"The server stayed lightning fast, without a measurable difference from day-to-day performance. [Azure] is costing us literally half of what we were paying with our other provider, but we're getting four to five times the value in performance."

Jeff Bishop, Board Member, American Council of the Blind | [Read the full story here](#)





## Choosing the right cloud platform

Comparing cloud grants and offerings from the leading providers helps you adopt a modern cloud foundation under the most favorable conditions. Microsoft offers 3x the cloud grant vs. AWS at \$3,500 (USD) per year.

### Next steps

You can manage your nonprofit's cloud journey to be smooth and nondisruptive. Here are some good entry points:

- The [Nonprofit Resource Guide for Your Database Migration](#) helps you design a resource-efficient, predictable Azure cloud migration strategy for databases.
- In the [Azure migration and modernization center](#) you find detailed guidance on how to prepare and migrate mission-critical workloads to Azure.
- [Azure training](#) programs assist you in gaining the skills, certifications, and confidence to accelerate your nonprofit mission in a cloud environment.

### Azure offerings

Through an annual grant, you can use service credits up to \$3,500 (USD) to take advantage of the complete portfolio of Azure cloud products and services. [Setting up your Azure credits](#) is an easy process.

[Explore Azure grants and resources](#) ➤

"We realized we could do even more with Microsoft—and thus accelerate scientific research—if Zooniverse also ran on Azure.... Being able to collaborate more closely and effectively with Microsoft was a powerful motivator."

Zach Wolfenbarger  
Software Developer, Zooniverse  
[Read the full story here](#)





# Engage constituents and gain operational efficiency

When you decide it's time for a major upgrade to achieve your goals, you can rely on a number of business applications solutions to accelerate your progress while keeping things simple.

## Streamline finance and operations management

[Microsoft Dynamics 365 Business Central](#) is powerful, easy-to-learn software designed for outcome-focused team members and volunteers who won't need to worry about the technology running in the background. With Business Central, you can more easily manage transactions based on multiple funding sources and align operations involving various memberships, associations, or charities. You save time and gain efficiencies as you simplify financial and operational management and consolidate information.

Business Central can integrate with your email, CRM, and other software tools, so you can minimize repeat data entry and don't need to navigate among multiple screens.

Roll out Microsoft Dynamics 365 Business Central to:

- Replace multiple, specialized finance and operations management applications with a single, coherent tool.
- Simplify financial management across funding sources and organizational entities.
- Manage important relationships—including donors, volunteers, and constituents—in integration with your CRM software, without losing sight of finances and donations.
- Automate routine administrative tasks to save time and avoid errors.
- Make it easier to maintain and demonstrate regulatory compliance.

### Next steps

[Watch a Business Central Demo.](#)

"We have a consistent flow of data through Business Central that's predictable and repeatable, so we can manage a heavily transactional system with fewer resources. By automating processes in Business Central, we save 10 hours per month on invoicing, 8 hours on banking activities like vendor payment uploads, and 12 hours on processing vendor invoice approvals. That frees up time for IT and other staff who support those business processes to actually focus on our mission."

David Ainsley, Director of IT, Call2Recycle | [Read the full story here](#)

## Reveal the stories behind the data

[Power BI](#) delivers simple, powerful analytics that you can use to generate insight from data. Visually intuitive and robust tools let you create impactful dashboards and reports, answer your burning questions, and communicate your findings. You can spot trends as they become visible, adjusting your outreach and constituent management to achieve the right results.

Consider Power BI when you want to:

- Display information from multiple sources in context and in a way that makes intuitive sense.
- Make the right decisions to improve your planning, outreach, and constituent management.
- Simplify the management of cases, volunteers, and donations.

## Build your own apps

[Power Apps](#) make it possible to use any data source in your organization to create apps without coding—quickly and inexpensively. You can take advantage of drag-and-drop functionality, prebuilt connectors, and templates to work quickly. Free online learning tools and tutorials get you up to speed fast.

Power Apps can help you:

- Provide helpful tools to team members and supporters, for example, a constituent-ready donation capability.
- Create an attractive, secure website.
- Simplify and improve processes without requiring anybody to learn programming.
- Make more sense of your data by using prebuilt AI components.

## Power BI offers

The desktop version of Power BI is free. Power BI Pro, which adds data collaboration, 360-degree real-time views, and other capabilities, costs \$3.00 (USD) per user, per month.

[Explore Power BI offerings](#) >

## Next steps

[Access Power BI training](#) and use templates to simplify working with Power BI.

## Power Apps offers

Power Apps is free for up to 10 users and just \$2.50 (USD) per month for additional users.

[Explore Power Apps offerings](#) >

## Next steps

[Watch a demo](#)

[Get started](#)—for free

**"GiveLife365 has greatly simplified the management of our growing member database with Microsoft Power Apps reporting and dashboard options."**

Soledad Silencieux, Programs Director, Support Black Charities | [Read the full story here](#)

# Boost fundraising and manage lifetime relationships with volunteers, donors, and constituents

[Microsoft Cloud for Nonprofit](#) combines functionality from Microsoft Dynamics 365, Microsoft 365, Azure, Power Platform, and LinkedIn in one comprehensive solution for managing donors, supporters, programs, fundraising, and marketing. Key capabilities of Microsoft Cloud for Nonprofit include:

- [Volunteer Management](#) and [Volunteer Engagement](#)—for efficient, results-driven volunteer recruitment, onboarding, scheduling, and management.
- [Fundraising and Engagement](#) to help you manage constituents and fundraising efficiently and based on data and insights.
- [Constituent Marketing Journeys](#) to make sense of your data related to your organization's engagements with volunteers, donors, and supporters, and to personalize and automate communications and outreach.
- [Program Impact Dashboard](#) built on Power BI to understand the impact of programs, assess fundraising, and drive sound decisions.
- Integration with [LinkedIn for Nonprofits](#) to boost fundraising and reach professional audiences.

Adopt Microsoft Cloud for Nonprofit to:



Build closer, lasting relationships with donors and supporters.



Shorten the time from planning to mission achievements.



Recruit, train, manage, and retain volunteers.



Assess and augment the impact of your programs.



Rally support and develop donations from professional networks.



Make it easier to generate, process, allocate, and account for one-time and repeat donations.

## Microsoft Cloud for Nonprofit offers


Once your organization's eligibility is confirmed, you should [review the licensing requirements](#). Depending on the functionality you need, adopting Microsoft Cloud for Nonprofit could be free for a basic plan or cost \$750 (USD) per month for the standard plan for small nonprofits.

[Explore Microsoft Cloud for Nonprofit offerings](#) >

## Next steps

- [See pricing details.](#)
- [Read other nonprofits' success stories.](#)
- [Review solution documentation.](#)





## Tell the world about your work

Globally, Microsoft Advertising reaches over one billion people. As a Microsoft-approved nonprofit, you can build visibility with them through monthly [advertising grants](#) that start at \$3,000 (USD) on digital search and native advertising.<sup>1</sup> You can apply this grant to advertising on Microsoft-owned and -operated search properties, such as Bing, Yahoo, and AOL, and premium native properties in the Microsoft Audience Network, including Outlook.com, MSN, and Microsoft Edge.

We recommend that you use the full grant amount to maximize the impact of your message. Note that you only use grant funds when somebody clicks on your ad, so you may be able to achieve more with your marketing spending.

Microsoft Advertising helps you:

- Drive qualified traffic to your website to grow awareness around your mission.
- Reach new audiences who can share and amplify your story.
- Attract new donors and volunteers.

[Apply for Ads for Social Impact](#) >

1. This offer is currently only available to nonprofits located in the United States.





# Technology learning made easy

Many free training and skills-building resources can help staff and volunteers become familiar with Microsoft solutions so they can work confidently. They can start using new technology tools without lengthy ramp-up time and can stay focused on the outcomes they want to achieve.

Microsoft technology learning resources for nonprofits suit a variety of learning styles:

- The [Nonprofit training and resources](#) page lists courses for our solutions, ranging from beginner to advanced levels. You can take most of these at your own pace.
- [Nonprofit Digital Academy](#) offers instructor-led training in solutions like Microsoft 365 or Teams, designed specifically for the needs of people working in nonprofits.
- [Microsoft Digital Skills Center for Nonprofits](#), a collaboration with TechSoup Courses, delivers technical skills development in small, on-demand chunks you can easily consume, practice, and apply.
- [Microsoft Security Virtual Training Days](#) help you address cybersecurity risks and safeguard your apps and information.
- [Microsoft Learn](#) provides modules and learning paths for our entire solution portfolio. You can search them to find the training sessions that matter to you.
- [Tech Impact Nonprofit Technology Learning Center](#) offers insight, research, and assessment tools to help you resolve more challenging technology concerns.

[Explore training and learning resources](#) >



# Working with a Microsoft partner

Nonprofit partners are ready to help you with your digital journey. Our partners are experts on all Microsoft products, from Microsoft 365 to Azure, Dynamics 365 and Power Platform to Microsoft Cloud for Nonprofit. Working with a Microsoft partner can help your team stay focused on what they do best—delivering impact through execution of programs and services—while keeping technology simple, reliable, and low maintenance. Here are answers to some frequently asked questions about Microsoft partners.

## Who are Microsoft partners?

Microsoft nonprofit partners are thoroughly vetted businesses that speak our language and yours. They are familiar with Microsoft solutions and have the expertise and passion to help nonprofits succeed in their technology deployment. Microsoft nonprofit partners are committed to understanding your organization's needs and solving challenges that can be addressed with technology.

- Need to address complex, quickly changing security, device, and data protection challenges.
- Wish to benefit from the most advantageous licensing as your organization benefits from all grants and discounts Microsoft offers nonprofits.
- Want help accelerating your transformation with Microsoft Cloud for Nonprofit by using the capabilities of Microsoft 365, Power Platform, Dynamics 365, Azure and LinkedIn to address common nonprofit scenarios.

## Does my small nonprofit need a partner to deploy new software?

While some small nonprofits choose to work with partners, others are comfortable deploying the technology on their own. Whether to use a partner or to self-serve often depends on the product you are purchasing, your comfort with deployment and implementation, and your budget.

## When should I use a partner?

Many organizations find that working with a partner saves them valuable time. Partners enable nonprofits to focus on what they do best—effective delivery of programs and services, fundraising, volunteer engagement, and more—realizing their goals and growing their core mission. In many situations, a partner will be invaluable. For example, if you:

- Are at the beginning of your digital transformation journey and need some advice on how to get started.
- Want to make certain that your Microsoft solutions work together flawlessly and will be easy to manage.

## What can a partner help me accomplish?

Engaging with a trusted partner at the right time can help you:

- Plan the best possible mission outcomes from adopting and integrating technology.
- Optimize your team's time and productivity.
- Solve problems plaguing your organization from realizing its true potential.
- Improve digital fundraising and donor relations.
- Better align technology with the roles on your team.
- Achieve a smooth, fast transition away from aging software tools.
- Roll out new apps to your team members efficiently and securely.
- Realize the benefits of technology sooner.



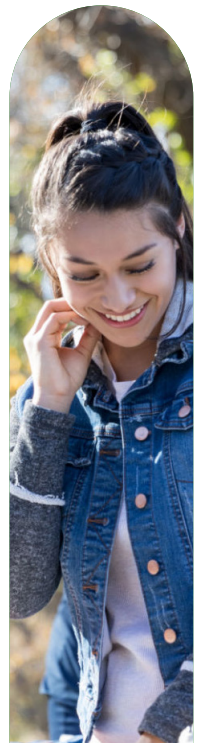
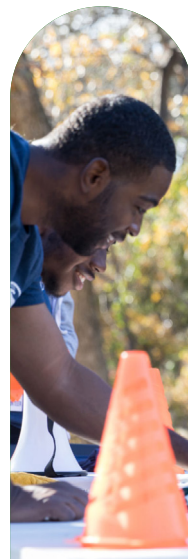


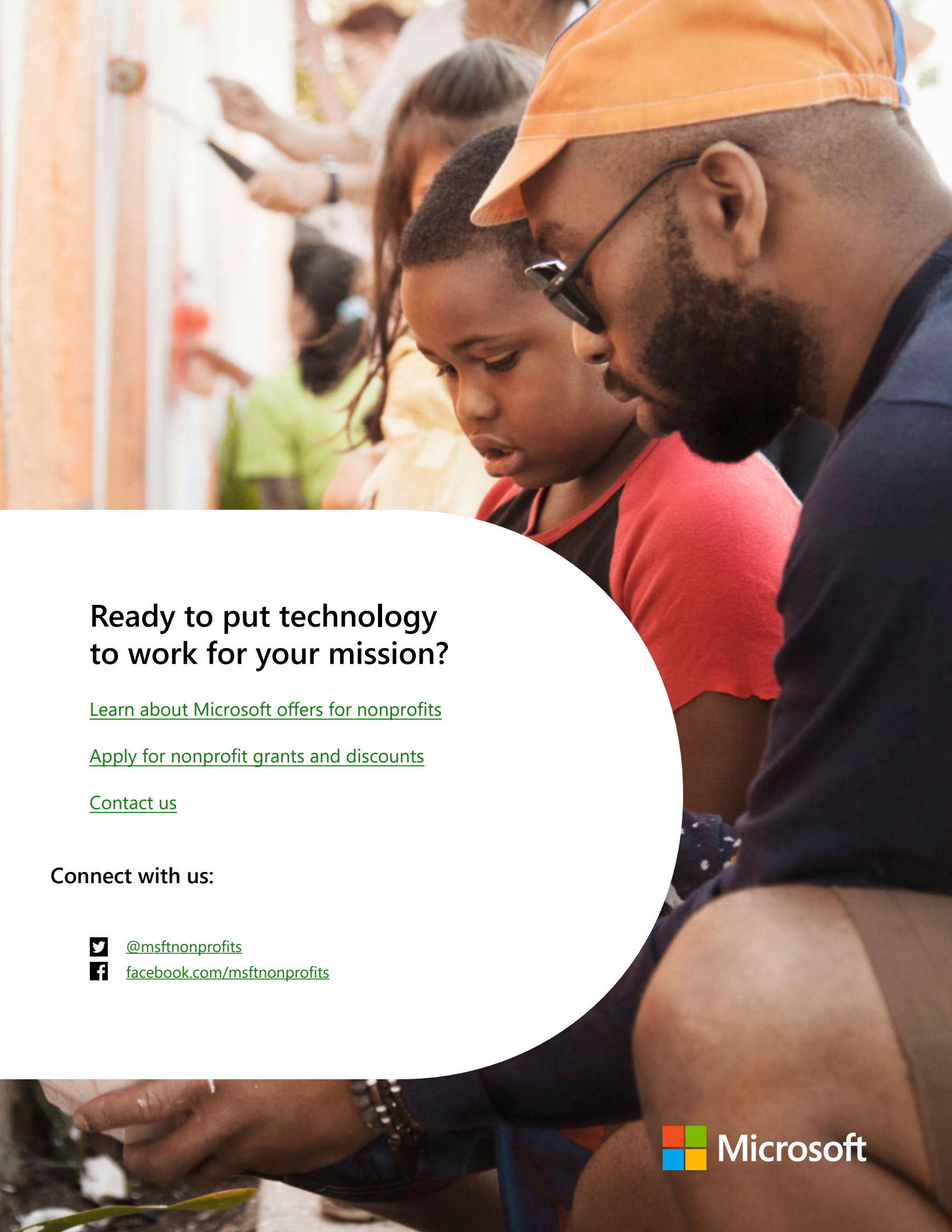
## Get your technology journey underway

We made it as easy as possible for you to apply for Microsoft grants and discounts. It's a three-step process:

1. Learn about the registration and eligibility process and how to get nonprofit offers from Microsoft. For more assistance, view the frequently asked questions about our nonprofit product donations and discounts. Next, gather documents that prove your organization's eligibility, as described on the eligibility page.
2. Microsoft will evaluate your potential eligibility. Registration review may take up to seven days. You will receive an email notifying you if your registration has been approved. While waiting for your registration review results, you can get a head start with technical training through Nonprofit Digital Skills Training with learning paths for nonprofit employees.
3. Once your registration is approved, you can access the Nonprofit Hub to take advantage of customized offerings to ensure productive collaboration and strong security for your organization.

[Get started with nonprofit offers >](#)





## Ready to put technology to work for your mission?

[Learn about Microsoft offers for nonprofits](#)

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