The small nonprofit guide to technology

Technology that empowers small and mid-size nonprofits to make a big impact
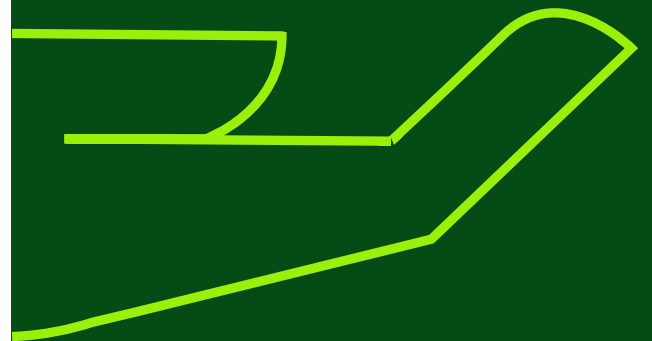
Accelerate your mission with free technology grants and innovative, secure solutions

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 solutions 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

Contents

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.

- If you already have a Microsoft 365 license, you get access to the web version of Microsoft Copilot with enterprise data protection. Use it to summarize large documents, create stunning images, and craft content.

"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, supporters, and donors anywhere.

Support team and supporter engagements with easy access and sharing with of 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.

Draft content, like emails to your community, social media posts, and compelling campaigns with Microsoft Copilot.

Making the right choice

Let's review the advantages Microsoft 365 provides over competitors such as Google Workspace:

Microsoft 365	Google Workspace
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.

Microsoft 365 grants and discounts

Our recommended solution for small to mid-sized nonprofits delivers advanced security and functionality:
- Microsoft 365 Business Premium discount: Includes Microsoft 365 desktop, web, and mobile versions apps, access to Microsoft 365 Copilot Chat, and enterprise grade security and access management for $5.50 (USD) per user per month paid yearly.

Additional Microsoft 365 offerings:
- Microsoft 365 Business Basic – free for up to 300 users.
- Microsoft 365 Business Standard – $3.00 (USD) per user per month.

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 and securely 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 datacenters, Azure infrastructure helps nonprofits maintain business continuity and recover quickly from disasters.

By transitioning current server system, and data 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 decide to keep certain applications and data 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.

- Improve data management and security through integrated, managed services.

- 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.

- Lower your costs through a pay per usage model.

"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.

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 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 ›

"In the past, investment in technology was difficult to justify. But with modern platforms, we can do so much to increase insights and services to our teams not just in head office but in the field, and help to drive efficiencies in processes"

Enrico Tizzano
Chief Technology Officer,
Brooke Hospital For Animals
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 nonprofit Business Central guided 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

Empower your nonprofit with AI

By automating tasks and embracing AI and cloud technology, your staff will be able to do more of what matters in the precious hours they have. Microsoft has developed several solutions that eliminate a significant amount of manual work and enable nonprofits to extend their outreach with the same number of staff. Generative AI presents new opportunities to increase efficiency and productivity, while building on the foundation of trust that is so critical to mission-driven work.

For instance, see how Microsoft 365 Copilot, your AI assistant for work, can help you:

- Create content efficiently and securely. Watch demo >

- Increase the productivity of staff and volunteers. Watch demo >

Get started >

Nonprofit pricing now available for Microsoft 365 Copilot

Achieve more than ever before with AI, securely. Microsoft 365 Copilot offers AI-powered chat that is integrated with Microsoft 365 apps. Simplify and automate processes with custom or pre-built agents—$25.50 (USD) per user per month paid yearly.

Learn more >

"Copilot is a force multiplier. AI does a lot of the heavy lifting so the people we help don't fall between the cracks."

Joel Ramjohn, President of Agape Source
Read the full story here

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 Microsoft 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 ›

When to meet 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 our full suite of AI-powered solutions. 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.

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.

- 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 solutions by using the capabilities of Microsoft 365, Power Platform, Dynamics 365, Azure, and LinkedIn to address common nonprofit scenarios.

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.
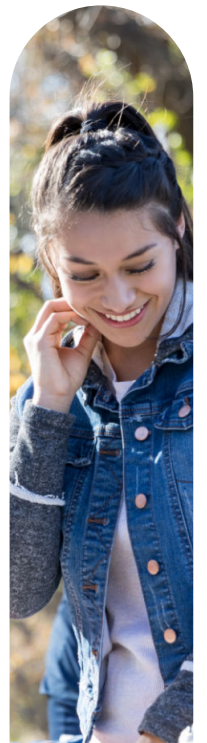
Get started with a partner ❯

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

Apply for nonprofit grants and discounts

Connect with a qualified Microsoft partner

Contact us

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