



HONNOLD
FOUNDATION



Nonprofit Resource Guide

A guide to nonprofit management
essentials from the Honnold Foundation

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Welcome to the Resource Guide

An integral part of our mission at the Honnold Foundation is investing in our network of grantee partners - we're here to support your leadership journey and the growth of your organization. We understand that to succeed, you need resources, tools and opportunities that are values-aligned, easy to use, and save you time.

As a funder aware of the power dynamics inherent in philanthropy, we are always working to reimagine our accountability to you. We aim to be in service to your expertise and efforts, and the knowledge you have of your own community. To this end, we have built this resource guide with input from our grantee partners and other grassroots organizations.

When we were in similar leadership roles, we always wanted a cheat sheet: a quick go-to guide that helped us address and solve the million questions that arise in nonprofit organizations. With a design team made up of other former leaders of nonprofits, our team developed the following leadership and resource guide for you and your organization to access.

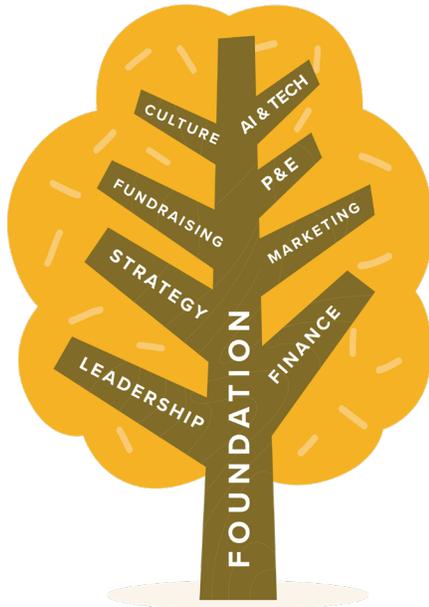
This guide includes opportunities to learn through:

1. Curated guides on how to approach different topics
2. Direct links to templates and other resources
3. Discussion questions to support deeper learning

How the journey begins:

Look at the sections below and decide where it makes the most sense for you to start - what do you and your organization need and what are your priorities?

- **Strategy:** crafting a persuasive plan, stakeholder engagement, ensuring an equity lens
- **Leadership:** individual and team leadership and collaboration
- **Culture:** building human resource practices and a culture of justice and equity
- **Board & Governance:** engaging your Board and volunteers, best practices and structures
- **Programs & Evaluation:** assessing the viability and impact of your programs
- **Finance:** budgeting and forecasting, financial management and controls
- **Fundraising:** revenue diversification, pitching diverse types of donors, pipeline development and stewardship
- **Marketing & Communications:** elevating the right voices to the right audiences
- **AI & Technology:** understanding how, when and where to use AI and technology



We believe that learning and growth for nonprofit leaders can be visualized like a tree. The trunk provides support as a foundation, and branches which indicate strategic areas for learning. We've developed a modular curriculum and associated resources to help you grow your trunk, while having the flexibility to explore different branches, all at a pace that suits your capacity, interest, and need.

This curriculum resource is a living document, and we welcome you to bring new learning opportunities and resources to our attention. Help us keep building the branches of the tree in this learning community. Know of a resource that's not included? Email us at contact@honnoldfoundation.org and specify "Resource Guide" in the subject line.

Free resources to keep on your short list when you have questions are below.

FUNDAMENTALS:

Candid - on-demand live and recorded webinars on a plethora of nonprofit topics

Taproot - resources around program efficacy and external efforts; skills-based volunteers

Leaders Trust - resources around leadership development and collaboration

Informing Change - resources on creating thriving and equitable communities

Nonprofit Learning Lab - training, webinars, and resources

Nonprofit Leadership Alliance Certified Nonprofit Professional program - training and certification around building leadership skills in the nonprofit sector

NonprofitReady - free online courses on aspects of nonprofit management, including fundraising, leadership, communication, and finances

National Council of Nonprofits - Running a Nonprofit - resources and guidance on running a nonprofit, covering topics such as governance, finance, and legal compliance

Nonprofit Hub - a comprehensive hub offering a range of articles, tools, and webinars on fundraising, marketing, and overall organizational effectiveness

INFORMATION TECHNOLOGY AND AI:

NTEN - dedicated to helping nonprofits leverage technology for maximum impact, they offer training, events, and resources to empower nonprofit professionals with the knowledge and skills needed to use information technology effectively

TechSoup - provides curriculum in partnership with funders for tech enablement and scale and access to low-cost software for nonprofits

Project Evident - AI case studies in action

Generosity AI Working Group - convening social sector leaders to navigate AI

Strategy

Grounding:

Having a sound strategy to guide your organization's work is key to everything you do. Planning in a strategic way should take place on an annual basis. But every 3-5 years, or at an organizational inflection point, is a good time to conduct a larger strategic plan, assess where you are as an organization, and options for where you should go.

What you'll find here:

The fundamentals of strategic planning. You'll gain the knowledge and tools needed to develop a strategic plan that drives your organization's mission forward, with a clear focus on equity and inclusion.

LEARNING GOALS:

- When to do a strategic plan vs use another framework to answer questions
- Demystifying strategic planning: core concepts, frameworks, best practices
- Identifying stakeholder needs and expectations: community, donors, and partners
- Connecting mission with community needs within the context of the dominant culture
- Crafting your strategic roadmap/plan
 - Assessing your mission statement
 - Building a shared vision
 - Defining organizational values
 - Analyzing the internal and external environment: SWOT analysis
 - Confirming your theory of change/logic model
 - Defining ambitious yet achievable SMART Goals
- Developing actionable strategies: translating goals into concrete programs
- Prioritizing your strategic pillars: allocating resources and focusing efforts on high-impact activities
- Establishing performance indicators: measuring progress towards goals/objectives
- Mobilizing your team: aligning roles and responsibilities with strategic objectives

Steps & Resources

When to do a strategic plan versus another framework:

- Start by looking at whether it's time to conduct a strategic plan: [practical questions your Board and team might ask about strategic planning](#).
- Look at a [sample planning timeline](#) to see what planning entails.
- It's important to understand if your organization needs a [strategic plan](#) or another type of planning, like a [strategic framework](#), [business plan](#) (and [what's the difference](#)), or [theory of change/logic model](#).
- Ideally, in advance of strategic planning, your organization conducts an equity assessment to center those findings in the planning process - [this tip sheet](#) helps.
 - [How to Approach Planning Through an Equitable Lens](#) | Mission Partners.
 - [Equity Minded Strategic Planning](#) | Minnesota State - a framework centering equity.
- Working on a Capital project? [Foraker Group](#) offers a toolkit with a range of resources that can be helpful.

Identifying stakeholder needs and expectations: community, donors, and partners:

- Connecting the community with your mission on an ongoing basis and your planning process are important parts of strategic planning. The Forbes Nonprofit Council suggests [9 ways to increase your community involvement](#) and [ways to involve community in your work](#).
- This [Community Needs Assessment](#) | Digital Commons - helps identify your community's goals and needs as central to your own impact strategy.

Crafting your strategic roadmap/plan:

- Google's [Gemini](#) and [ChatGPT](#) are great places to go if you want to find out more about any of the processes and components of strategic planning. Using prompts like "What is the process for creating a shared vision statement for a nonprofit?" or "How do I conduct a SWOT analysis?" produces step-by-step instructions.
- Guides to create your mission and vision statements: [Bridgespan](#) and [Top Nonprofits](#).
- [Vision Before Strategy: A Nonprofit's Guide to Defining Success](#) | Blue Avocado - important questions to answer at the heart of developing your vision and strategy.
- [Useful Tools for Strategic Planning](#) | Bridgespan - talks about benchmarking (a tool to determine how well organizations are performing relative to peers), funding models, landscape impacts, and intended impact.
- Dive deep into creating your theory of change with a guide to [articulating your impact](#) (note: this is developed for Tech Nonprofits, but applies to all NPOs), a blank theory of change [framework](#) and [documentation templates](#).
- Design [Equity Centered Organizational Values via this webinar](#) from Candid.



Developing actionable strategies:

- When you're ready to make strategies for implementation, consider making **SMART goals** | Nonprofit Learning Lab.
- The SMART framework is used to ensure clarity and focus in an organization's goals and can be used at a programmatic or organizational level. Here's how the framework applies:
 1. **Specific:** Clearly define the goal the organization wants to achieve, addressing the who, what, where, and why in alignment with its mission.
 2. **Measurable:** Identify concrete criteria to track progress and success, ensuring accountability and demonstrating impact.
 3. **Achievable:** Set realistic objectives that consider the organization's available resources, staffing, and funding.
 4. **Relevant:** Ensure the goal aligns with the organization's mission, values, and long-term objectives.
 5. **Time-bound:** Establish a clear deadline to maintain focus, momentum, and a sense of urgency.
- See the **SMART Goals template** HF provides for grant partners and applicants.
- **Bridgespan's Living Into Your Strategic Plan: A Guide to Implementation That Gets Results** includes **Tools and Templates for taking your plan to action** and ways to:
 - **Translate Strategic Goals Into Actionable Initiatives**
 - **Create a Blueprint for Change**
 - **Mobilize the Team**
 - **Align Finances to Support Implementation**
 - **Monitor Progress**
 - **Revisit and Repeat**
- If you're looking to embed equity into your SMART goals, one notable resource is the **SMARTIE framework** and **worksheet** from the Management Center.

Discussion Questions

- What are the foundational elements of strategic planning, and how do the various models or frameworks differ?
- How can strategic planning processes be made more inclusive, and what are the specific benefits of incorporating equity lenses?
- What's the optimal timeline for our organization to develop a strategic roadmap? How long should it cover?
- What are the essential ingredients of a powerful and actionable strategic plan?
- How do we set boundaries for our strategic roadmap to avoid overreaching or under-delivering?
- How do we conduct a comprehensive needs assessment within our community?
- What methods are most effective for engaging diverse stakeholders?
- How can we balance the expectations of donors and partners while staying true to the primary needs of the community we serve?
- Does our mission statement clearly articulate our purpose and reason for existence?
- Is our mission statement still relevant to the community context and our current work?
- Does our mission statement inspire action and resonate with stakeholders?
- How do we collaboratively craft a vision that truly engages and unites our team and partners?
- Are there specific tools or exercises that aid in developing a truly shared, compelling vision?
- How do we make our vision statement actionable, guiding decision-making on a daily basis?
- In what ways might our mission statement require revision to address the real, complex needs of the community we serve?
- How do we remain true to our mission while adapting to the evolving needs and shifting cultural dynamics?
- How do we uncover our core operating values beyond just aspirational statements?
- What's the best format for conducting a SWOT analysis?
- Do we have a clear and well-articulated theory of change or logic model?
- How do we ensure that our everyday projects and programs directly ladder up to our theory of change/logic model?
- How do we balance ambition with the reality of available resources when setting goals?
- What are the common pitfalls that lead to poorly defined SMART goals?
- How can we set SMART goals in a collaborative way that promotes ownership at all levels?



Leadership

Grounding:

You are the leader. The tools and resources in this section serve to elevate ways you can develop your individual and team leadership skills in a cohesive and impactful manner. Forging a culture of authentic collaboration, listening and trust is vital to engaging and growing your team and volunteers. By putting the time and resources into cultivating shared leadership and improving internal processes, your organization can become a place where people want to work, which is a way to best serve your communities.

What you'll find here:

This section introduces nonprofit leaders to core concepts of authentic and collaborative leadership. You will learn from leadership development experts and find new ways to motivate and lead, grounded in your core values. We also recommend you join the **ED Nonprofit Happy Hour Facebook group** - a private group for Executive Directors to find community and share resources.

LEARNING GOALS:

- Building a cohesive and collaborative ecosystem of leadership
- Cultivating a culture of shared accountability and transparency
- Leading the way in the sector: sharing your knowledge and best practices to inspire and empower others
- Developing leadership grounded in values and authenticity
- Understanding the landscape of Executive Management

Steps & Resources

Cohesive and collaborative ecosystem of leadership:

- Review this resource on the importance of collaborative leadership - [**How Nonprofit Leadership Development Sustains Organizations and Their Teams**](#) | Bridgespan.
- Consider hosting a collaborative exercise on shared leadership from [**Team Leadership**](#) on a quarterly basis.
- Find ways to engage your team members in Board reporting, meetings and committee work - [**Board-Staff Interaction: What's Acceptable, What's Not? You Ask, We Answer**](#) | BoardSource.

Shared accountability and transparency:

- Communication goes a long way towards a truly transparent environment. Here are tangible ways to improve your internal communications and information sharing - [**11 Strategies to Break Down Nonprofit Communication Barriers**](#) | Giving Compass.
- Transparency is important at all levels of the organization, and your Board plays a key role in forging a transparent culture - [**Understanding the Importance of Board Transparency**](#) | BoardEffect.
- Transparency can also impact your revenue generating activities and external brand - [**The Value of Nonprofit Transparency**](#) | Classy.
- Research shows that transparency is an important part of a successful organization - [**Transparency matters in nonprofits, according to research**](#) | Candid.
- Tech tool can help your transparency and reporting - some options that are good for grassroots nonprofits include [**Monday**](#) or [**Trello**](#).

Inspiring and empowering others:

- Leadership development starts by looking inward - [**How to Develop Yourself as a Nonprofit Leader**](#) | Bridgespan.
- Follow this playbook's exercises to help you develop yourself as a leader then your team and your organization - [**The Emerging Leaders Playbook**](#) | Third Plateau.
- Bridgespan offers insights into future leadership needs to inform your planning - [**Understanding Your Future Leadership Needs**](#) | Youtube.com.
- Looking for ways to inspire your team? This TED Talk offers tangible strategies - [**Simon Sinek: How great leaders inspire action.**](#)
- A tool for leaders to accelerate race equity in the social sector through their work - [**Self to Systems: Leading for Race Equity Leadership Model**](#) | ProInspire.
- [**To Build Shared Vision in Communities, Trust Them to Lead**](#) | Nonprofit Quarterly.



Values-based leadership:

- Take a fresh look at your organization’s current values, Harvard Business Review offers a [good overview](#) of the importance of a refresh.
- Use a reputable values exercise to engage your team in this refresh; an example of this tool is the [guide offered by Brene Brown](#) or HBR’s “[How to Establish Core Values on a Small Team](#)”.
- Use your refreshed values as a way to “re-launch” your organizational culture - be sure to engage your Board in this process too!
- Have each team member share their individual values as part of the refresh.

Executive management tools:

This collection of resources at [Management & Leadership](#) | 501 Commons - helps Executives and Boards understand the nuts and bolts of all things Executive Director:

- [Hiring an Executive Director](#)
- [Evaluating Executive Performance](#)
- [Information about Coaching](#)
- [Interim Management](#)
- [Leadership Development & Nonprofit Careers](#)
- [Leadership Transition & Succession Planning](#)
- [Quality Improvement & Lean Management](#)
- [Turnaround Management & Dissolution](#)

Discussion Questions

- What are the current strengths and weaknesses of our leadership structure in fostering collaboration?
- What are some potential challenges to building a cohesive ecosystem, and how can we overcome them?
- What does shared accountability look like within our team/organization? How can we hold each other accountable for achieving goals?
- What methods can we implement to increase transparency in decision-making processes?
- How can we create clear and accessible communication channels to keep everyone informed about important developments and progress towards goals?
- How can we celebrate successes and recognize individual contributions within a collaborative framework?
- How can we use our organizational values to improve our current leadership approach?
- What processes and systems do we use or need for better information-sharing and empowering our team?



Culture

Grounding:

Your team is your greatest asset: a strong foundation in Human Resources (HR) practices is essential to support their growth and build a successful and sustainable future for the organization. Understanding legal compliance, crafting clear policies, and developing effective communications protects your organization, empowers your employees, and allows your team to focus on achieving your mission. Fostering a culture with justice and equity practices embedded at its center provides a safe container for staff to be their best at work. A strong culture allows employees to bring their diverse lived and learned experiences and expertise to work to both expand and reflect the change you wish to see in the world.

What you'll find here:

You will find resources to help you create HR practices that attract top talent, fosters engagement, and empowers your team to reach its potential. You will also find support to promote a culture of justice, equity, and open communication.

Note: Find more resources for leaders on culture in the [Leadership Section](#).

LEARNING GOALS:

Foundational HR

- Building a strong foundation of traditional HR needs: legal compliance, employee handbooks, policies, and procedures
- Building diverse and inclusive teams: recruiting, retention, and development strategies
- Addressing performance challenges constructively
- Setting clear goals and expectations: performance reviews, feedback loops, and coaching conversations
- Fostering effective communication: open dialogue, feedback, and conflict resolution
- Implementing flexible work arrangements
- Recognizing and preventing burnout: promoting work-life balance and healthy boundaries

Justice & Equity

- Fostering a culture of anti-racism and social justice within your organization
- Promoting safety and belonging: creating inclusive and supportive work environments
- Operationalizing justice & equity: leadership, HR, and operations best practices

Steps & Resources: Foundational HR

Note: An ongoing conversation with resources and advice is on the [Resource for Humans Slack](#).

Building a strong foundation:

- A strong foundation starts with an employee handbook, here is a template of a [Sample Employee Handbook](#) | National Council of Nonprofits.pdf, hosted at [501 Commons](#).
- SHRM also has this article on [How to Build a Better Employee Handbook](#).

Building diverse and inclusive teams:

- Learn about [Hiring](#), including how to mitigate bias | The Management Center.
- [Recruiting and Managing Employees](#) | 501 Commons.
- [Employee Benefits & Compensation](#) | 501 Commons.
- [Employee Benefits after COVID-19: A five-year transformation](#) | HR Executive.

Addressing performance challenges:

- [Performance Problems](#) | The Management Center.

Setting clear goals and expectations: performance reviews, feedback loops, and coaching:

- If you're looking to embed equity into your SMART goals with employees or across your organization, one notable resource is The Management Center's [SMARTIE framework](#) and [worksheet](#).
- [Investing in People](#) | The Management Center - helps you develop and invest in your staff, and includes tools for giving and receiving feedback, and evaluating performance.
- [Delegation](#) | The Management Center - helps you clearly define success and expectations.

Fostering effective communication: open dialogue, feedback, and conflict resolution:

- [Check-ins](#) | The Management Center.
- [Culture & Relationships](#) | The Management Center.
- [Managing Managers](#) | The Management Center.
- [Managing Up & Sideways](#) | The Management Center.
- [Whistleblower Protections](#) | 501 Commons.



Supporting workers: flexible work arrangements, preventing burnout, and boundaries:

- [This blog post on spica.com](#) explains how to implement a flexible work arrangement.
- Explore some of the resources on alternative work weeks, like the [Four Day Workweek](#) | Rockwood Leadership Institute.
- It's important to acknowledge both the [Advantages and Challenges to remote work](#) | Gallup.
- Work-life boundaries are always important, especially in remote workplaces, learn more on [Candid's blog](#).
- Consider staff sabbaticals with this [DIY Guide](#) | Durfee Foundation and [policy samples](#).
- Learn the signs and learn about [Supporting Resilience and Preventing Burnout in Nonprofits](#) | McKinsey or watch this [webinar](#) from CharityVillage with your staff.

Steps & Resources: Justice & Equity

Fostering a culture of anti-racism and social justice within your organization:

- Seeing the systems we live in is a great place to start - read [Tema Okun's Characteristics of White Supremacy Culture](#) and Sheena Daree Miller's [Confronting White Supremacy Culture in the Social-Impact Sector](#) to see examples of how the culture shows up in impact work.
- dRwork's web-based workbook at [dismantlingracism.org](#) was designed to support the Dismantling Racism Works 2-day basic workshop and is now offered as a free resource.
- [Unfinished business: Why the social justice movement needs nonprofits](#) | Candid.
- Inspiring leadership rooted in equity - [How Business Leaders Can Build a More Equitable Workforce](#) | Bridgespan.

Promoting safety and belonging: creating inclusive and supportive work environments:

- [How Nonprofits Can Structure Inclusion Practices for Greater Impact](#).
- [Disability Etiquette](#) | 501 Commons.
- [Sexual Harassment](#) | 501 Commons - includes resources for policies.

Operationalizing justice & equity: leadership, HR, and operations best practices:

- [Equity & Inclusion](#) | The Management Center - tools on how to center equity and inclusion as you manage people and projects.
- [A Consent Based Decision Making Protocol for Teams](#) | Circle Forward.
- [Centering Equity in Measurement and Evaluation](#) | Urban Institute.

ADDITIONAL RESOURCES:

Free equity tools for educators and facilitators from the National Equity Project:

[Community Agreements: Implementing, Monitoring & Repairing](#)

[Cultural Synchronization Questions](#)

[Developing Community Agreements](#)

[Equity Messaging Guidance for Districts](#)

[Facilitator Tips: Challenging Meetings](#)

[Identifying an Equity Challenge](#)

[Liberatory Design Card Deck](#)

[Virtual Facilitation Principles & Resources](#)

[Nearpod Course: An Introduction to Equity Work](#)

Racial Equity Tools is a library of more than 3,000 tools, tips, curricula, research and other resources supporting people working to achieve racial equity at every level – in systems, organizations, communities, and the culture at large.



Discussion Questions

Foundational HR

- How do we create an employee handbook that balances necessary information with readability?
- How can we mitigate unconscious bias in our recruitment practices?
- What are key strategies to fostering an inclusive workplace?
- Which performance issues require coaching vs disciplinary action?
- What are effective techniques for delivering constructive feedback that motivates improvement?
- How can we link individual employee goals to the larger mission of our organization?
- How can we establish feedback mechanisms beyond the annual performance review?
- What are signs of burnout, and how can we create a culture that prioritizes well-being?
- What flexible work arrangements might benefit our organization, and how do we implement them?
- How can we ensure that employee voices are heard and valued in decision making?
- How can we foster a culture of open communication?
- What's the best way to gather and use formal and informal employee feedback?

Justice & Equity

- What gaps exist in our organization's current practices regarding anti-racism and social justice?
- What are 2-3 steps our organization can take to promote a more anti-racist culture?
- What does an inclusive work environment look and feel like from an employee's perspective?
- What's one systemic barrier to inclusion in our organization, and how might it be addressed?
- How can our organization's mission statement better reflect a commitment to justice and equity?
- What accountability measures can ensure that equity remains a priority in our organization?



Board & Governance

Grounding:

All nonprofits have a Board of Directors. Boards can help organizations “sink or swim” with their approach to shared leadership, fiduciary and risk oversight, and engagement in planning and fundraising. This section serves to elevate best practices on these important topics.

Effective governance is the Board’s responsibility, but they often lean on Executive Directors and consultants to help set vision, evaluate effectiveness, and course correct. Knowing and embedding best practices within your organization will pay off internally (culturally) and externally (trusted brand and fundraising). We recommend sharing this resource with your Board Chair and/or Governance Committee.

What you’ll find here:

You will find resources to elevate governance best practices and needs to and with your Board of Directors. These tangible resources can efficiently make important changes as you set the stage for further growth and impact.

LEARNING GOALS:

- Demystifying the Board’s duties including: fiduciary, strategic, oversight, and fundraising duties
- Ethical Board structure and conflicts of interest
- Determining the ideal size and skillset balance for your Board based on mission, stage, and needs
- Assessing your organization’s current Board composition and identifying potential gaps or redundancies
- Board management basics, including Board/ Staff roles in organizational leadership and committees
- Developing a targeted recruitment strategy to attract highly qualified and engaged Board members
- Implementing term limits and succession planning for Board renewal and vitality
- Developing a collaborative fundraising strategy with clear roles and expectations for Board engagement; contributing unique skills to revenue and network development

Steps & Resources

Fiduciary and oversight duties:

- Start with the basics, like Duty of Care, and assess whether your current Board is living up to its basic charges - [Board Roles and Responsibilities](#) | National Council of Nonprofits.
- Board and staff often work together on committees or special efforts like strategic planning. Role delineation and flexibility is important - learn more in this [engaging video](#) on Governance and effective roles. For example, your Development Director or consultant would serve on your Board's Fundraising or Events Committee.
- Boards can make mistakes too. Board Effect offers an overview of common pitfalls. Engage your Board in reviewing this before a retreat or meeting and discuss mitigation strategies openly - [Nonprofit Board Governance Mistakes – And How to Avoid Them](#) | BoardEffect.

Strategy:

- Board Effect offers a great overview of [The Board's Role in Developing a Strategy Plan for a Nonprofit](#).
- Subscribe to Harvard Business Review's nonprofit series and learn [How Nonprofits Can Keep Strategy Front and Center](#), which highlights frequent blind spots of Boards with strategy and planning.
- Your Board should revisit your organization's theory of change/impact hypothesis as part of its planning process - [What Are Intended Impact and Theory of Change and How Can Nonprofits Use Them?](#) | Bridgespan.
- Make sure to engage your internal and external stakeholders in your planning process. This takes time, but the payoff can be an inclusive process that listens and learns from staff and communities you serve - [Stakeholder Engagement Toolkit](#) | Bridgespan.

Boards and fundraising:

- Board Members know they have a role to play with network and development, but often do not know where to start. BoardSource offers a tangible overview - [Fundraising for Nonprofits and the Board's Role](#) | BoardSource.
- Board Effect offers tangible tools, with a focus on growth-stage nonprofits including "what not to do" - [How Nonprofit Boards Should Approach Fundraising](#) | BoardEffect.
- Ensuring that your Board members have accurate talking points and data around organizational impact and direction is key. Create a folder with current collateral and dashboards to equip them and keep them up to date.
- More often than not, professionals are on multiple Boards and may need to get creative when focusing on network development and partnerships - [Leveraging Your Board for Nonprofit Fundraising: 10 Creative Strategies and Tips for Success](#) | Flipcause.

Ethical, diverse and inclusive Boards and recruitment:

- At a very basic level, nonprofit Boards and their members should be ethical and have practices that reflect this value - **Ethical Leadership for Nonprofits** | National Council of Nonprofits.
- Nonprofits are designed to support and serve diverse communities. Your Board should mirror those that you are serving, offer diverse lived and professional experience, and keep equity and inclusion at the center of its culture and approach - **Why Diversity, Equity, and Inclusion Matter for Nonprofits** | National Council of Nonprofits.
- Nonprofits of any size can benefit from implementing a Board Matrix to assess current Members' contributions and backgrounds and elevate gaps that should be filled through recruitment - a sample if offered here - **Matrix Tool** | BoardSource.
- Grassroots nonprofits often benefit from a Community-Centric structure, as highlighted here - **7 principles of community-centric boards** | Nonprofit AF.
- “Nothing is more important than the health and sustainability of your organization” - this toolkit offers ways to cultivate, recruit and grow Board Members - **Board Recruitment** | BoardSource.
- Term limits are important, so everyone knows how long they have to engage with your nonprofit. Not abiding by term limits sets a dangerous precedent, keeps people lingering, and impedes new perspectives from joining - **Nonprofit Board of Directors Term Length: How Long is Too Long?** | Foundation Group® (501c3.org).
- There's no one-size fits all approach to Board structure, Nonprofit AF offers some **Alternative Governance Models to Explore** | Nonprofit AF.



Discussion Questions

Fiduciary and oversight duties

- How does the Board ensure the organization is operating ethically and in accordance with its mission?
- What are the Board's responsibilities regarding risk management and compliance?
- How can the Board hold management accountable for the organization's performance?

Strategy

- How does our Board set the organization's long-term vision and goals? What have we gleaned from these materials that may inspire deeper engagement in strategic planning?
- What are best practices for evaluating the organization's progress towards its strategic goals?
- How, and how often should the Board revisit vision and strategy?

Boards and fundraising

- What is the Board's role in cultivating major donors and securing funding?
- How can Board members leverage their networks to support fundraising efforts?
- What metrics should be used to measure the effectiveness of the Board's fundraising activities?

Ethical, diverse and inclusive Boards, recruitment and terms

- What are the key characteristics of a diverse and inclusive Board?
- How can the Board ensure it has the right mix of skills and experience to support the organization's needs?
- What are potential challenges associated with Board composition, and how can they be addressed?
- How do we currently handle term limits? How might we think about this differently given what we have learned?

Programs & Evaluation

Grounding:

Evaluating and measuring programs is important to all nonprofits, especially those that cultivate and steward major individual and institutional donors. Implementing systems to elevate data trends and successes (as well as challenges) will position you to make important trade off decisions and scale what works. Your funders may also require varying levels of reporting; having data at your fingertips will greatly ease this burden.

What you'll find here:

Use the tools on the next page as a guide for learning about the importance of program efficacy and measurement, tools and processes for evaluation, centering equity and telling your impact story.

Note: There are a lot of tools and toolkits for developing programs and evaluation. Many of the tools below have similar information in them, so we suggest finding those that speak to you, your organization's culture and your style of learning.

LEARNING GOALS:

- Understanding the “why”, “how”, and benefits of learning and evaluation; introducing participatory and inclusive evaluation approaches like surveys, interviews, focus groups, data analysis
- Designing the data collection tool and processes that work for your organization; integrating tech into data collection and program evaluation
- Conducting regular evaluations and reflection: analyzing results, identifying learnings, and celebrating achievements
- Adapting and refining your strategy: using evaluation findings to inform future plans and optimize impact

Steps & Resources

Foundation of Evaluation: building a culture of ongoing feedback and measurement:

- [How to Build a Nonprofit Evaluation Practice](#) | Third Sector New England - will help you integrate evaluation into your organization's ongoing work.
- Build a common understanding of key concepts and why measurement matters - [Intro to Measuring your organization's effectiveness](#) | Candid.
- [Building a Strategic Learning and Evaluation System](#) | FSG - a toolkit to help build a strategic learning and evaluation system.

Program-Level Evaluation: donors and partners want data about your programs:

- A great overview of [Program Evaluation](#) | Bridgespan, with links to sample surveys, toolkits and sample evaluations.
- Move from knowledge to action by designing an evaluation plan for a specific program - [How to Create a Program Evaluation for your Nonprofit](#) | Coursera.
- [Strategies for Measuring Impact](#) | NPO Centric - practical measurement tools and strategies to assess the effects of your programs.

Build your practice, center equity:

- [The Monitoring, Evaluation and Learning \(MEL\) toolkit](#) | Better Evaluation - includes a [MEL capacity assessment](#) that you can complete with colleagues and share with your Board.
- [Use the Equitable Evaluation Framework™ \(EEF\)](#) and all the resources on the [Equitable Evaluation Initiative](#) website to understand the ways your evaluation processes might put equitable concepts and mindsets at the center.
- [Community Engagement Assessment Worksheet](#) | Building Movement Project - offers a worksheet to assess your current and potential community engagement efforts.
- [Community Voice Toolkit](#) | Urban Institute - offers tools to ensure community input is at the heart of your program planning and evaluation.

Tell your impact story:

- [Storytelling for Good webinar](#) | The Communications Network - helps you turn data into narratives that resonate with donors and the community.
- [World Bank's Tools, Methods, Approaches](#) | World Bank - provides more advanced tools as you hone your evaluation and storytelling skills, and set your stage for further growth. This would be a good tool to embed into any Strategic Planning process you undertake.

Discussion Questions

- How is MEL connected to the overall mission of our organization?
- What are the most important aspects of our programs that we want to understand better? What do we want to learn about our program's impact on our community?
- What's the difference between qualitative and quantitative data?
- What are the different data collection and evaluation methods we might use?
- Who are the key stakeholders (participants, staff, community) we should include in evaluation?
- How can we make sure our evaluation processes are culturally sensitive and respectful? What are some creative or culturally-relevant ways to collect feedback?
- What are some potential barriers to collecting data, and how can we overcome them?
- How might we start to make sense of the data we collect?
- How can data inform our program decisions? How might we adapt our programs as we learn?
- What's one step we'll take to integrate evaluation into our program?

Finance

Grounding:

Nonprofits are businesses, and financial management is a core component of any business. At the same time, for many nonprofits, the complexity and unpredictability of fundraising and income generation makes business development and financial sustainability much more complex than it is for for-profit businesses. Executive Directors of smaller nonprofits are often expected to also play the role of Chief Financial Officer, frequently without formal finance training. The components shared in this section aim to provide you with all the resources you need to effectively manage and interpret your finances and cash flow, equipping you to make short- and long-term decisions with your staff and Board.

What you'll find here:

An introduction to finance and reporting tools for your organization with everything from building a budget to understanding financial reports.

LEARNING GOALS:

- Understanding the core components of nonprofit financial management
- Learning what, when and how to interpret and present your financial data to your Board, funders and staff
- How to budget for short-term and long-term strategies

Steps & Resources

Consultants and outside expertise, like [BDO](#), can help support organization's financial and budgeting needs.

Nonprofit Finance Fund (NFF): Fundamentals for Nonprofits - levels 101 and 201 trainings in financials, via an online progressive toolkit.

We've highlighted several of their key tools here to get you started:

Self assessment for your organization:

- Financial Self-Assessment Worksheet: [Know Your Strengths and Weaknesses](#) | NNF.

Reporting and analysis:

- Nonprofit Finance Fund's Financial Planning, Parts 1/2** is a webinar that includes:
 - Introduction to key financial concepts and cash flow basics: assets, liabilities, net assets, revenue, expenses, budgeting.
 - Introduction to key financial reports: balance sheet, income statement, statement of cash flow. Reading and understanding financial reports for informed decision-making.
 - Identifying key financial ratios: liquidity, solvency, profitability, efficiency and internal controls: safeguarding funds and ensuring financial accuracy.

How to budget and more on reporting:

- Operating in a Changing World** and **Cash Flows** are two NFF webinars that include:
 - Creating realistic and flexible budgets: Developing accurate project budgets: estimating costs, securing funding, and managing resources.
 - Using financial reports to track progress towards goals and identify areas for improvement (HOW to report - the frequency and how to visually present info so it's digestible by Boards/staff).
 - Forecasting/cash flow projections; strategies for managing cash flow fluctuations: seasonal changes, grant cycles, unexpected expenses.

Learning what, when and how to interpret and present your financial data:

- Crafting your Financial Narrative: [How to Craft Your Organization's Financial Story](#) | NFF.
- Managing through Economic Uncertainty: [Managing through Economic Uncertainty](#) | NFF.
- Business Model & Sustainability: [Thinking Through the Business Model](#) | NFF.
- Financial Literacy for Nonprofit Boards: [Financial Literacy for Nonprofit Boards](#) | National Council of Nonprofits.
- HF Financial Template**.



Discussion Questions

- What are our biggest challenges with using financial data to make important decisions?
- What did we learn from completing the self-assessment? How might we use this to have important discussions with our staff and Board?
- How have we been able to tie financial performance to our impact?
- What have been our biggest unanticipated expenses to date? How could we better plan for these in the future, leveraging the materials provided?
- What are our current internal controls? Any gaps we see?
- How have we been able to ground our staff in the finances of our organization? What opportunities are there to expand on this?
- What level of detail does our Board ask for? Need?



Fundraising Essentials

Grounding:

Fundraising is an essential function of any thriving nonprofit. Developing a sustainable revenue stream is important to your organization's growth and long-term viability. Ensuring fundraising activities are strongly tied to program outcomes and organizational vision and strategy are key parts of creating a holistic and effective resource development strategy. In addition to building an effective fundraising plan, hiring mission-centered, skilled fundraising and development staff members is both essential to your success, and increasingly difficult in the nonprofit sector. The resources that follow elevate key themes and trends in fundraising and offer tangible ways to increase your fundraising capacity at any stage of growth.

What you'll find here:

Tools and resources to understand revenue types and opportunities, build and report on strategies and forge a culture of giving throughout your organization.

LEARNING GOALS:

- Understanding the landscape: types of revenue and donor motivations
- Developing a fundraising strategy: setting goals, aligning with mission and program needs
- Building a strong fundraising team: roles, responsibilities, volunteers, ethical principles

Steps & Resources

Understanding the landscape:

- **Types of Fundraising** | Honnold Foundation - understand the different types of revenue generating activities and opportunities.
- **Have a Fundraising Plan** | the National Council of Nonprofits - food for thought around topics from revenue diversification to major individual donor cultivation to stewarding current donors.
- An overview of **The Neuroscience of Giving** | Psychology Today.

Fundraising strategy:

- **Build a Strategic Fundraising Plan for Your Nonprofit** | Taproot Webinar/article.
- We have put together this fundraising plan template for you to leverage internally and with your Board - **Annual Fundraising Plan Template** | Honnold Foundation.
- Check out more about the Board's role with fundraising in the **Board/Governance** Learning Journey - get started with this summary of the Board's role with fundraising: **Fundraising for Nonprofits and the Board's Role** | BoardSource.

Culture and team:

- Fundraising has long been an important function at all nonprofits. It is vital to approach fundraising activities with the same ethical approach that the organization takes with its oversight duties. **Association of Fundraising Professionals** including the **Code of Ethical Principles and Standards for Fundraisers** offers a code of conduct that is tested and proven.
- Candid offers some tangible ways for "**Cultivating your Fundraising Team**" through creative and engaging methods.
- **The Lived Experience of Fundraisers of Color** | CauseEffective - is an important read to ensure your diverse team members are cared for and supported as they approach and scale their fund development efforts.
- Forging and growing a culture of philanthropy across your organization, at all levels, is important - **How Can We Define Philanthropy? Building a Culture of Philanthropy** | NPQ.

More tools and trainings:

- **The Grantsmanship Center** - workshops, webinars, and resources to help develop effective grant proposals and navigate the grant-seeking process.
- **Community Centric Fundraising** offers tools and resources for engaging your communities in revenue generating activities.
- **Lily School** is a premiere higher education center of philanthropy and offers a variety of tools and virtual learning opportunities.
- **FreeWill.com "Willy"** is an AI tool to help nonprofits be efficient with fundraising efforts.



Discussion Questions

- What are the different types of revenue our organization can generate (e.g., grants, individual donations, corporate sponsorships, membership fees, event income)?
- What are the strengths and weaknesses of each revenue stream?
- How do we balance diversifying our income sources with the capacity constraints of our staff team?
- How could we understand the motivations of donors differently than we have in the past?
- How can we tailor our message and approach to resonate with different donor motivations?
- Who is and should be involved in our fundraising strategy and planning work?
- What are our fundraising goals for the next year (or other timeframe)?
- How can we track our progress towards achieving our fundraising goals and how do our goals align with our organization's mission and program needs?
- What resources and budget do we need to support our fundraising plan?
- How will we measure the success of our fundraising plan?
- What are the different roles and responsibilities required for a successful fundraising team (e.g., development director, grant writer, major donor officer, volunteer coordinator)?
- What skills and experience are essential for each role?
- How can we ensure clear communication and collaboration within the fundraising team?
- Why is it important to focus on the experience of fundraisers of color?
- What are the ethical principles our organization embodies well? What might need to be course corrected?

Fundraising Sources

Grounding:

As highlighted in the fundraising essentials module, one of the keys to success is understanding which revenue streams will be most appropriate for your nonprofit mission and structure. It's important to balance the need to diversify your funding with the realities and capacity constraints of a small staff team. This section serves to detail the different funding sources available to nonprofits, and strategies for cultivating and stewarding various types of donors. Cultivating donors requires a significant level of internal capacity for research, cultivating donors, pitches, reporting and stewardship. The systems you put in place to track these opportunities are vital, and a clear way to update and engage your volunteers and Board in your efforts.

What you'll find here:

This section serves to put the topics in the **Fundraising Essentials** section into action, using real-time needs and examples to enhance your understanding and approach to fundraising.

LEARNING GOALS:

- Individual Donors:
 - Mastering the art of effective storytelling: connecting with donors through impactful narratives
 - Leveraging data and analytics: understanding donor behavior, segmenting donor groups, and tailoring fundraising approaches
 - Building relationships with individual donors: compelling appeals/ personalized communication, stewardship strategies
- Foundations and Grant Writing: understanding foundation priorities, demystifying the grant application process, identifying suitable grants, proposal writing best practices
- Corporate Partnerships: building collaborative relationships with businesses for mutual benefit
- Other Income Strategies: government grants and earned income

Steps & Resources

Managing relationships:

- No matter what revenue sources you have, behind each one is a person or multiple people. Your donors and funders are another group of stakeholders whose relationships are important beyond their transactions. Investing in managing those relationships can make all the difference. Some organization track donors with spreadsheets while others use platforms like **Salesforce** or **Bloomerang**.
- Information on donor/funder relationship management can be found on many of the sources listed in **Fundamentals**, and many vendors have great tools for organizations. **Nonprofit Moves Management** | Salesforce, and the **Moves Management Guide** | Neon are a good place to start.

Individual donors:

- Per Giving USA, Individual Donors make up 80%+ of the philanthropic pie (including family foundations) so it's worth spending time and resources on cultivating individual relationships. **The Pitch Path: An Ultimate Guide to Pitching a Major Donor** | Pitch+Persuade is a great place to start.
- **Understanding Donor Motivations (Including Your Own!): A Training Exercise - Non Profit News** | Nonprofit Quarterly - a fun exercise for understanding donor motivations.
- A powerful organizational narrative goes a long way towards securing and retaining new individual donors - **The Power of Storytelling in Fundraising: Inspiring Donors through Compelling Narratives** | Donately is a great resource.
- Donor relationships can lead to new Board Members, Strategic Partners and other important advancements for your organization - **9 Ways to Build Strong Donor Relationships** | Donorbox.
- Giving Tuesday is a day that can leave nonprofits disappointed with their outcomes - be thoughtful about the resources you put into one day of giving - **Giving Days: The Guide to Planning Your Next Campaign** | Onecause.

Foundations and grants:

- Sign up to receive grant opportunities in your inbox with Candid's **Request For Proposals Finder** | Philanthropy News Digest - lets you filter by issues and geography.
- After researching potential grants, you will want to prepare for funder engagements - **How to Have an Introductory Conversation with A Funder** | National Council of Nonprofits.
- Building out a system for tracking different opportunities (Research - Cultivation - Stewardship - Pitch - Decision) will help you keep track of a growing number of funding opportunities and share them with staff and Board; **Salesforce**, **Monday** and **Trello** all have pipeline tracking capabilities.



Corporate partnerships:

- Corporate partnerships can be tempting from a branding and public trust perspective. Before going that direction read **Three Lessons For Building High-Impact Corporate Partnerships** | Forbes.
- “Mission Creep” can happen when cultivating potential corporate partners - avoid this pitfall as it is a dangerous precedent - **Mission Creep: How Nonprofits Can Stay True to Their Missions** | BoardEffect.

Other revenue opportunities - ways to scale:

- An overview of how to approach, apply for, and potentially secure government funding - **Government Grants for Nonprofits: Who is Eligible and How to Get One** | Donorbox.
- Do you have revenue-generating programs or other activities, or the potential for this diversification? **Nonprofit Earned Income: Critical Business Model Considerations for Nonprofits** | Nonprofit Financial Commons.

*Note: while government grants and earned-income are not the most common revenue sources for grassroots organizations, they are potential pathways for scaling your organization and your impact. A good time to explore this is during **Strategic Planning**.*

Discussion Questions

- What are the key components of a strong fundraising appeal for individual donors (e.g., clear call to action, urgency, gratitude)?
- How can we personalize our communication with individual donors to deepen relationships and encourage continued support?
- What strategies can we use to show appreciation and keep individual donors engaged (e.g., impact reports, thank-you notes, volunteer opportunities)?
- How can we research a foundation's mission, funding areas, and recent grants awarded to understand their priorities?
- What are some potential red flags that a foundation might not be a good fit for our organization?
- How can we tailor our project or program to align with the specific foundations, without compromising our mission?
- What steps are involved in a grant application process and what do we need to prepare?
- What are common mistakes organizations make during the grant application process, and how can we avoid them?
- How can we write a clear and concise proposal that communicates the value and impact of our project?
- What types of businesses are most likely to be good partners for our organization, considering their industry, values, and target audience? How can we avoid mission creep?
- What are the key considerations for structuring a mutually beneficial partnership agreement?

Marketing & Communications

Grounding:

Strategic communications is one of the most powerful tools nonprofits have, and is key to:

1. Achieving organizational goals, expanding awareness of your work, building public trust, and increasing investment in your mission
2. Building narrative change, and organizing and advocating for your work and its impacts

Communications helps us reach goals by building our brand (driving awareness), marketing (driving people to take action), managing our reputation (fostering positive perceptions), fundraising (compelling donors/funders to give), and human resources (fostering a healthy culture). We can also use our communications to go beyond our mission and build community and change.

What you'll find here:

This section will help you define your goals, identify and build your audience, learn how to create effective messaging and evaluate the impact of your storytelling.

LEARNING GOALS:

- Setting clear marketing and communication goals aligned with your overall mission
- Approach to developing a communications plan/calendar
- Articulating mission, values, and impact in your elevator pitch
- Developing messaging that resonates
- Identifying your target audiences and plan to connect with them
- Harnessing the power of storytelling
- Measuring the results of your communications

Steps & Resources

A *communications plan* is a strategic roadmap that outlines how your organization will share your messages with key audiences to achieve your mission and goals. It ensures that all communications—whether internal or external—are consistent, targeted, and effective.

Gemini and **ChatGPT** will produce a sample an organizational communications plan with the prompt, “create a nonprofit strategic communications plan outline”.

The W.K. Kellogg Foundation hosts a **Strategic Communications Planning Hub** with downloadable resources, like a **Communications Plan Builder** tool and learning modules:

- **Communication Strategies for Change**
- **Message Development**
- **Digital Strategies & Tactics**
- **Content Development**
- **Media Relations**
- **Rapid Response & Crisis Communication**
- **Communicating with Funders**
- **Communicating with Government Leaders**
- **Campaign Communication**

Communications toolkits and guidebooks:

- **Vision, Values, and Voice Communications Toolkit** | The Opportunity agenda - is a great resource for learning everything from how to conduct research on communications to building messaging and working with the Media.
- Defining your brand name as an organization, developing value propositions, and expanding your marketing strategies are all important parts of effective communications - **The Tech Nonprofit Marketing Guidebook** | Fast Forward.
- **The Communications Network** is a professional association that provides resources, networking opportunities, and training for nonprofit communicators - they have lots of resources to explore, including collaborative documents, a video library, and research.
- **The Rad Comms Resource Guide** has infrastructure and tools like link checkers, audio software, timeline creators, a fast pitch tool, etc.



Narrative change: how to use communications for more than storytelling:

- Using your work to help shift narratives is a powerful way to use communications to go beyond your organization, get started by [Building your Narrative Strategy](#) | Race Forward.
- Racial Equity Tools' [Narrative Change Resource Center](#) provides useful strategies, examples and tools for center Racial Equity in narratives.
- [The Narrative Initiative](#) - offers practical worksheets and [trainings](#).

Practical tools and resources to support effective communications:

- SumofUs.org and ActivistEditor.com created a fantastic [Progressive's Style Guide](#) that has up to date movement language as well as what NOT to say in messaging.
- [Minute Message Model](#) | MissionMinded - craft an elevator pitch like a Mad Libs.

Developing a voice and creating a message:

- Knowing your audience is key to developing effective communication and driving engagement - [Audience Identification Worksheet](#) | Narrative Initiative.
- [Developing Your Organizational Voice Worksheet](#) | Narrative Initiative - helps organizations develop (or memorialize) an organizational voice that reflects your identity.
- Reach the community you are serving using community-focused messaging - [Community Values Communications Toolkit](#) | Center for Community Change & The Opportunity Agenda.

Storytelling: learn the basics of effective storytelling:

- Staying true to your ethics and values is key in storytelling - [VOW's Ethical Storytelling Principles](#) | Voice of Witness.
- [The Shape of Stories](#) by Kurt Vonnegut and [Pitch the Way VCs Think](#) by Vinod Khosla offer the basics in how to cut through clutter and create stories people respond to.
- [Nonprofit Marketing Guide](#) provides tips, training courses, and resources to help organizations effectively communicate their missions and engage with their target audiences.
- [How to Start and Run an Effective Digital Campaign](#) | Color Change - lets you create digital campaigns and petitions and [Digital Storytelling for Social Impact](#) recommends tools and techniques to elevate digital storytelling.

Evaluation:

- [Are We There Yet? A Communications Evaluation Guide](#) helps foundation and nonprofit communicators learn whether their communications are effective:
 - Evaluation improves the effectiveness of communications.
 - Evaluation helps organizations more effectively engage with intended audiences.
 - Situations change - strategies and tactics may need to change as well.
 - Evaluation ensures wise allocation of resources.



Discussion Questions

- How do our communications goals support objectives in our strategic plan?
- How can we ensure that our communications goals promote equity in the way our organization is represented and the audiences we reach?
- What should guide the frequency and timing of our communications (e.g., seasons, special events, budget restrictions)?
- How can we create a flexible communications plan that can adapt to unexpected events?
- What differentiates our organization from others doing similar work?
- How can we test our elevator pitch on diverse audiences?
- Does our story reflect the voices and experiences of those our organization serves?
- What are 3-5 core messages we want to consistently communicate about our work?
- How can we translate messages into language that resonates with different audiences?
- How do we ensure our messaging avoids jargon and is accessible and inclusive?
- What interests, values, or behaviors help define our target audiences?
- Where do our target audiences get their information (e.g., social media platforms, community events, trusted news sources)? How does this inform our outreach?
- Are there “influencers” that our audiences trust, and how might we partner with them?
- How can we gather compelling stories directly from the people our nonprofit serves, in a way that’s ethical and empowering?
- What multimedia formats can best convey the emotional impact of our work?
- How do we balance storytelling with calls to action for our audience?
- What are metrics that will show we’ve achieved our goals (e.g., website traffic, social engagement, donations, volunteer sign-ups)?
- How can we design qualitative ways to get feedback on our communications?
- How will we use data from analytics to refine our communications strategy and continually improve?



Artificial Intelligence (AI) & Technology

Grounding:

There are two major ways that nonprofits use technology and artificial intelligence (AI):

1. Technology infrastructure, aka your “tech stack” - A tech stack is the collection of software and digital tools your nonprofit uses to support operations - the “stack” refers to how all the components fit together. A well-chosen stack (including tools for email, donor tracking, and communications) boosts efficiency and organizes data, freeing up time for mission work. Assembling tools reactively can lead to disconnected systems, so a thoughtful approach to the ways your tools “stack” ensures smoother operations and supports future growth.
2. Technology program delivery - using technology such as a website, app, AI, or other digital platform *as the foundational means to achieve your mission and vision*. The nonprofit **Fast Forward** has a directory of “tech nonprofits,” nonprofits that build and manage technology tools that provide mission-based services. Check it out [here](#) to understand what these organizations do.

Example: Imagine creating a new website. Think of tech infrastructure as the hidden foundation of a website, like the servers and code that make it run. Program delivery is how you actually get that website, with all its features, into the hands of users.

What you’ll find here:

A guide to building understanding on technology and AI, identifying core needs, building a tech budget and technology roadmap, selecting reliable tools, and initiating low-risk AI experimentation using options with privacy controls.

LEARNING GOALS:

- Understand core tech stack components and how to select cost-effective, stable tools
- Recognize the importance of tech/AI governance, data privacy, and security, and find guidance for policies
- Grasp basic AI concepts (Generative AI, Predictive AI) and practical tech/AI use cases
- Develop a framework for experimenting with *paid basic* AI tools safely and ethically
- Develop a preliminary tech/AI roadmap aligned with strategic goals and identify staff training tools
- Know key support organizations (TechSoup, NTEN, etc.) in the nonprofit tech landscape

Steps & Resources

Setting your tech strategy:

- Here are three practical ways to get started with your nonprofit's tech plan [from TechSoup](#).
- The transcript of this intro webinar provides more detail about [technology planning for nonprofits](#) | TechSoup.
- [Equity Guide for Nonprofit Technology](#), and [Cyber Security for Nonprofits](#) | NTEN – are great resources that can help lay an ethical and safe foundation for a Tech Strategy.
- According to NTEN's budget report, small nonprofits spend around 13.2% of their overall budgets on nonprofit technology ([NTEN](#)). This blog post from Ripple IT, [IT Budgets for Nonprofit Organizations](#), looks at what to include in an IT Budget, what security measures to take, and why it's important to budget (hint: good justification for funders and your Board).

Building your tech stack:

- Focus on core needs first. When selecting tools, think about:
 - **Mission Alignment:** Does it directly support your goals and needs? Do you see a pressing problem or opportunity where the best solution would be a tech tool?
 - **Benefits to Staff:** Will a new tool help staff develop new skills, use their time wisely, and be more effective? Or will it take more time than it's worth?
 - **Cost vs. Benefit:** Evaluate total cost against expected benefits (time saved, efficiency gains). Seek nonprofit discounts through resources like [TechSoup](#), [Google Workspace for Nonprofits](#), and [Microsoft 365 for Nonprofits](#).
 - **Scalability:** Can the tool grow with you? Ensure upgrade paths exist.
 - **Integration:** Do tools connect (e.g., donation platform to CRM)? Good integration minimizes manual work. Consider community support hubs like the [Salesforce Power of Us Hub](#) if using their platform.
 - **Prioritize Stability and Vendor Track Record:** Especially for core systems like your CRM or productivity suite, lean towards established vendors. Check resources in [TechImpact](#) for software guides. While new tools can be exciting, adopting untested applications increases risk. Balance innovation with stability.



Table: Core Tech Stack Components and Low-Cost or Discounted Options

Component	Purpose	Examples (Seek Nonprofit Pricing/ Established Vendors)	Key Considerations
Productivity Suite	Email, calendar, documents, storage, team chat/video	<u>Google Workspace for Nonprofits</u>, <u>Microsoft 365 (via TechSoup)</u>	Cloud-based, collaboration, security, storage/backup, nonprofit eligibility.
Project Management	Project management, time tracking	<u>ClickUp</u>, <u>Slack’s AI tools</u>, <u>Smartsheet</u>, <u>Asana’s AI tools</u>, <u>Notion</u>	Team communications, workflows, and priorities.
Constituent Management (CRM)	Track donors, volunteers, communications, donations	<u>Salesforce</u>, <u>Neon</u>, <u>DonorPerfect</u>, <u>Bloomerang</u>, <u>HubSpot for Nonprofits</u>	Data organization, fundraising support, integration potential, scalability, ease of use, vendor stability.
Email Marketing/ Comms	Send newsletters, appeals	<u>Mailchimp</u>, <u>Brevo</u>, <u>Constant Contact</u> (via <u>Techsoup</u>), often integrated with CRM	List management, analytics, ease of use, integration, compliance.
Website CMS	Online presence, info sharing, branding	<u>WordPress</u>, <u>Squarespace</u>, <u>Wix</u>, potentially built into CRM	Ease of updates, mobile-friendly, and potential integrations.
Online Donation Processing	Securely accept online gifts	<u>GoFundMe Pro</u> (formerly Classy), <u>Givebutler</u>, <u>Zeffy</u>, <u>Stripe/PayPal</u>, often integrated with CRM/ website	Security, ease of use, fee structure, integration, reporting, vendor reliability.
Private LLMs / Enterprise Tools	Enterprise versions of leading AI tools	<u>Google Cloud AI for Nonprofits</u> - Enterprise AI tools, check nonprofit credits <u>Microsoft Cloud for Nonprofit (AI Features)</u> - Integrated cloud offerings with AI	Offer enhanced security/privacy but higher cost/ complexity. Consider when data security is paramount.



Artificial Intelligence (AI):

AI refers to computer systems performing tasks typically needing human intelligence. Learn more basics from [Google Cloud's explanation](#). Key AI Concepts include:

- **Generative AI:** Creates new content. Examples: [ChatGPT](#), [Gemini](#).
- **Predictive AI:** Uses data to forecast future events.
- **Machine Learning (ML) / Natural Language Processing (NLP):** Technologies enabling AI.
- If you're curious about the AI landscape, Andreessen Horowitz, a California-based VC firm, [curated a product list for 2025](#).
- Fast Forward's [Playbook on AI Powered Nonprofits](#) is a good place to get started.
- Start by creating an AI policy for your organization, setting parameters for how you will and won't use AI. [Nonprofit AI Policy Builder](#) | Fast Forward walks you through the process.
- Assess your organization's readiness to work with AI using [Project Evident's beta AI Readiness Diagnostic](#). The self-assessment will delve into aspects of your organization's readiness for AI, including: Design for Justice and Equity, Strategic Purpose, Knowledge and Skills, Data and Systems.
- Self-training resources include: [NTEN's AI Hub](#) (which also has options for paid classes, certifications, and to join a community of others learners), the [McGovern Foundation Learning Hub](#), and [Google for Nonprofits AI](#), which includes use cases.

If you decide to use AI without a diagnostic or other support, here are some best practices:

- **First Steps: Safe and Low-Risk Experimentation (with Privacy Focus)** - start small, learn by doing, build confidence, prioritize data privacy, and ensure everyone internal to your organization using the tool has looked at their privacy and sharing settings before using it.
 - **Identify 1-2 Time-Consuming Tasks** that allow you to use AI as an assistant, like drafting, brainstorming, or summarizing something.
 - **Choose an Established AI Tool** (see below).
 - **Use Non-Sensitive Data ONLY.**
 - **Review/Edit Critically:** Human review is essential for accuracy, bias, and tone.
 - **Learn Prompting:** Good prompts can make or break how well generative AI will work for you. You can look at articles like these [17 tips from Wired](#) or ask the generative AI model you are using how to write good prompts (even if you type this question into Google, its AI will tell you). If the first draft of something is wrong, ask the AI to help you write a better prompt to get closer to what you want to do.
 - **Introduce to Staff (Optional Pilot):**
 - **Start with Intro/Demo:** Use resources (see training options below).
 - **Set Clear Guidelines:** Emphasize data rules and human review.
 - **Pilot Project:** Provide controlled access (paid basic seat if possible) for low-risk tasks.



Experimenting with GPTs (Generative AI - paid tiers recommended):

- **Anthropic** - a generative AI tool that puts ethical and safety considerations at the forefront.
- **Change Agent AI** - “The AI Platform for Social Impact & Political Advocacy” serves political and nonprofit organizations.
- **ChatGPT (OpenAI)** - Access the tool; review *ChatGPT Plus* for privacy benefits.
- **Gemini (Google)** - Google’s tool; review *Gemini Advanced* for privacy benefits.
- **Microsoft Copilot** - Microsoft’s AI.

AI tools specifically built for nonprofits:

- **FreeWill.com** - a suite of tools to help with fundraising, including their new (in 2025) **Grant Assistant AI** to help with grantwriting, which is receiving rave reviews from nonprofits.
- In addition to being all around great (with a staff composed of many former nonprofit employees), FreeWill has also compiled **a 2025 list of best nonprofit AI tools**.
- **Intuist.ai** - offering non-profit specific tools and customized chatbots.
- **Benevity** - a suite of tools to help with fundraising and connecting with donors.

Note: this is a changing landscape and very new - make sure to thoroughly check out a tool that's listed here to see if you believe it will exist in the future before updating all your systems.

Training resources:

- **Board.Dev** will help you find and train Board members with tech expertise. They also have a **Tech Governance Playbook**, which can support nonprofit executives and their boards to understand how to implement tech governance in their boardrooms.
- **NTEN AI Webinars & Courses** - Training from introductory to specific applications, self-paced, and certificates available.
- **InnovateUS** provides no-cost, at-your-own-pace, and live learning on data, digital, and innovation skills for public servants.
- **TechSoup AI for Nonprofit Services** - offers custom help for AI implementation as well as more general classes.
- The **Guide to Essential AI Competencies** | AllianceforAI - is intended to be a useful tool in supporting organizations and individuals in their understanding of the AI knowledge and skills that are most critical to their roles and areas of work.
- **Tech Impact** - Nonprofit tech consulting, strategic planning resources.
- **The PJMF Learning Hub** has workshops, courses, case studies, and facilitation guides.

Table: Ways AI Can Support Functions within Nonprofits

Goal	Purpose	Key Considerations
Operational Efficiency	Automate tasks like drafting initial emails/reports, summarizing notes, and brainstorming content	Explore use cases via <u>Google for Nonprofits AI</u> .
Communications and Personalization	Crafting donor appeals, generating content ideas, and using CRM data aided by AI analysis for personalized messaging	Must be done ethically and with consent.
Fundraising and Grant Writing	Drafting initial donor appeals, grant proposal sections (e.g., background, needs statement), completing and summarizing funder research	Can have a huge, immediate positive impact on your efficiency - make sure to review and refine as you go along.
Data Analysis & Insights	Analyzing <i>anonymized</i> qualitative feedback (surveys, interviews); Predictive analytics (e.g., donor trends, program demand - advanced)	Use cautiously. Paid/private AI preferred for sensitive analysis. Ensure anonymization. Predictive analytics is advanced and requires clean data/expertise.
Program Support and Delivery	AI-powered chatbots for FAQs, personalized learning modules, and optimizing volunteer schedules/comms	Consider mission-based rationale for creating/managing a tech tool. See examples from <u>NetHope</u> , insights from <u>Fast Forward</u> and review TechSoup's Caravan Studio <u>Roadmap to Community Driven Design and Development</u> .

Table: Ways AI Can Support Functions within Nonprofits (continued)

Goal	Purpose	Key Considerations
Governance and Policy Support	Creating first drafts of HR policies, communication guidelines, volunteer handbooks, data privacy summaries, AI usage policies, and accessibility statements	Must be reviewed, customized, and approved by relevant experts (legal, HR, leadership). Ensure alignment with organizational values and legal requirements.
Advanced Security/ Privacy Tools	Ensure maximum data security for sensitive operations via specialized platforms	Higher cost and complexity. Necessary when handling highly sensitive data or requiring advanced controls not available in basic paid tiers. Investigate options when security is paramount.

Governance, policies, security, ethics:

- Fundraising AI's **Framework Towards Responsible and Beneficial AI** provides guidelines for incorporating AI into fundraising in a way that maximizes benefits and minimizes risk – the framework can be integrated into an organization's overall AI ecosystem.
- **Microsoft AI Governance Framework for Nonprofits** - Structured approach for AI governance.
- **TAG Responsible AI Adoption in Philanthropy** - Ethical principles for AI adoption and **Toolkit**.
- **NTEN AI Resources (Policy Sections)** - Templates and articles for nonprofit AI policies.
- **National Council of Nonprofits - AI Page** - Resources on AI ethics and policy.
- **The Center for Democracy and Technology (CDT)** - Resources on governance, privacy, and bias.
- **TechSoup Cybersecurity Resources** - Protecting nonprofit data and systems.
- **Center for Humane Technology (CHT)** - Broader societal impacts, ethical design.
- **Center for Accessible Technology (C4AT)** - Ensuring tech accessibility.

Discussion Questions

- What are the key factors we should think about when developing our tech budget, and how can we access affordable tools?
- How can we safely and ethically start using AI, even in small ways, to help with daily tasks?
- Which parts of our work could AI help with most right away, and what challenges might we face?
- Why is it important for people, not just AI, to check and approve anything AI creates, like emails or reports?
- How can we make sure our use of technology and AI is equitable and accessible?
- With technology changing so fast, how can we make sure we keep learning and choosing the best tools for our needs?



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