



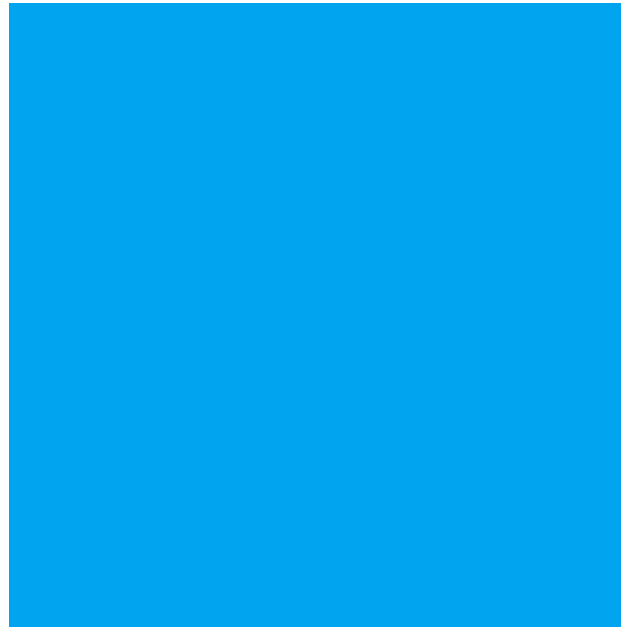
# Microsoft Cloud for Nonprofit





# Microsoft mission

Empower every person  
and every organization on  
the planet to achieve more.





**We are living  
in a changed  
world**



# The pace of change is raising challenges



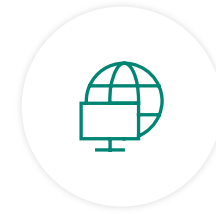
**150 million**

Global growth of the undernourished from 2019-2022.<sup>1</sup>



**90%**

Countries reporting one or more disruptions to essential health services.<sup>2</sup>



**9 in 10**

Say the internet was essential or important during the coronavirus outbreak and will continue.<sup>3</sup>



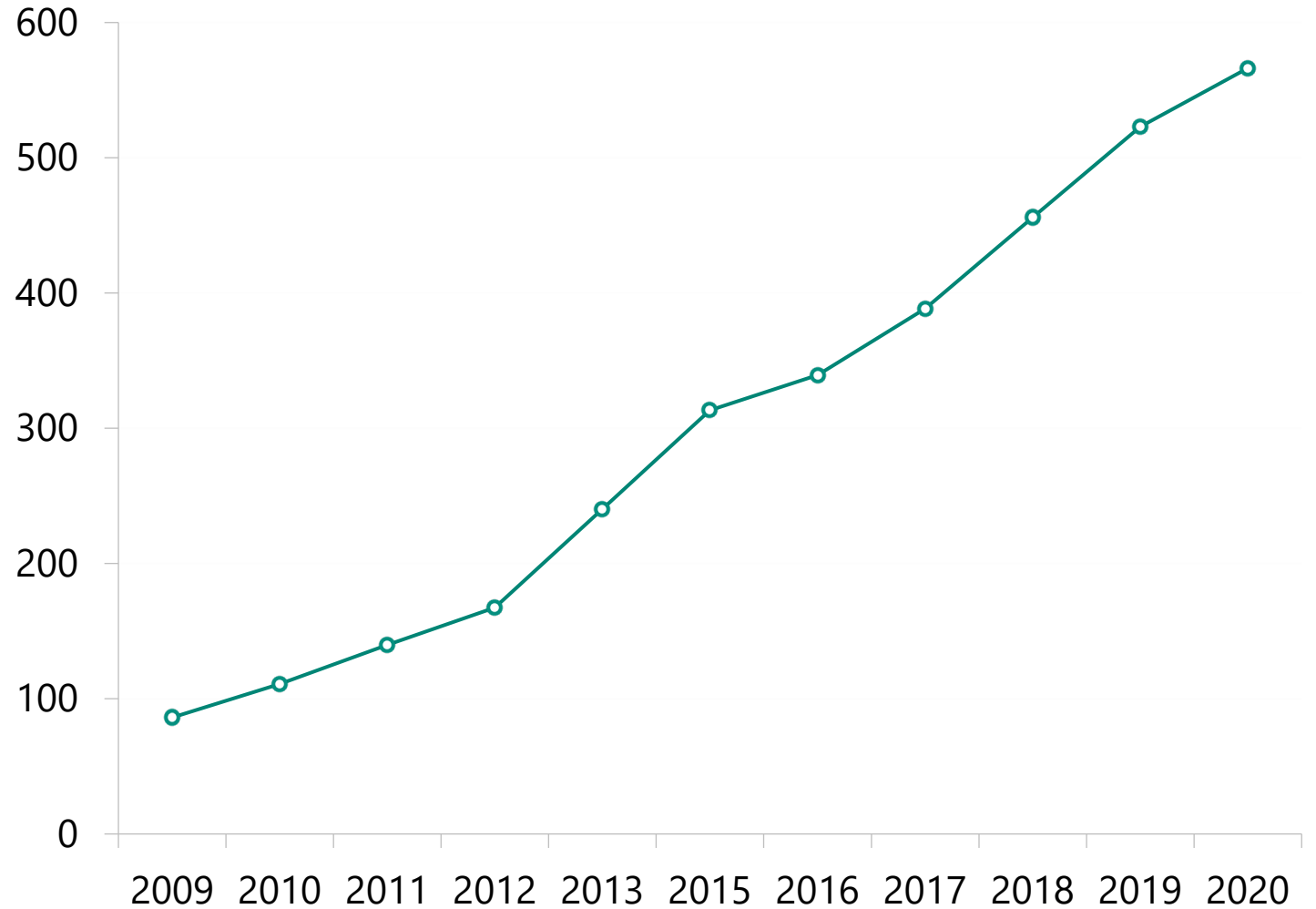
**50%**

Nearly half of the world's population is still offline.<sup>4</sup>



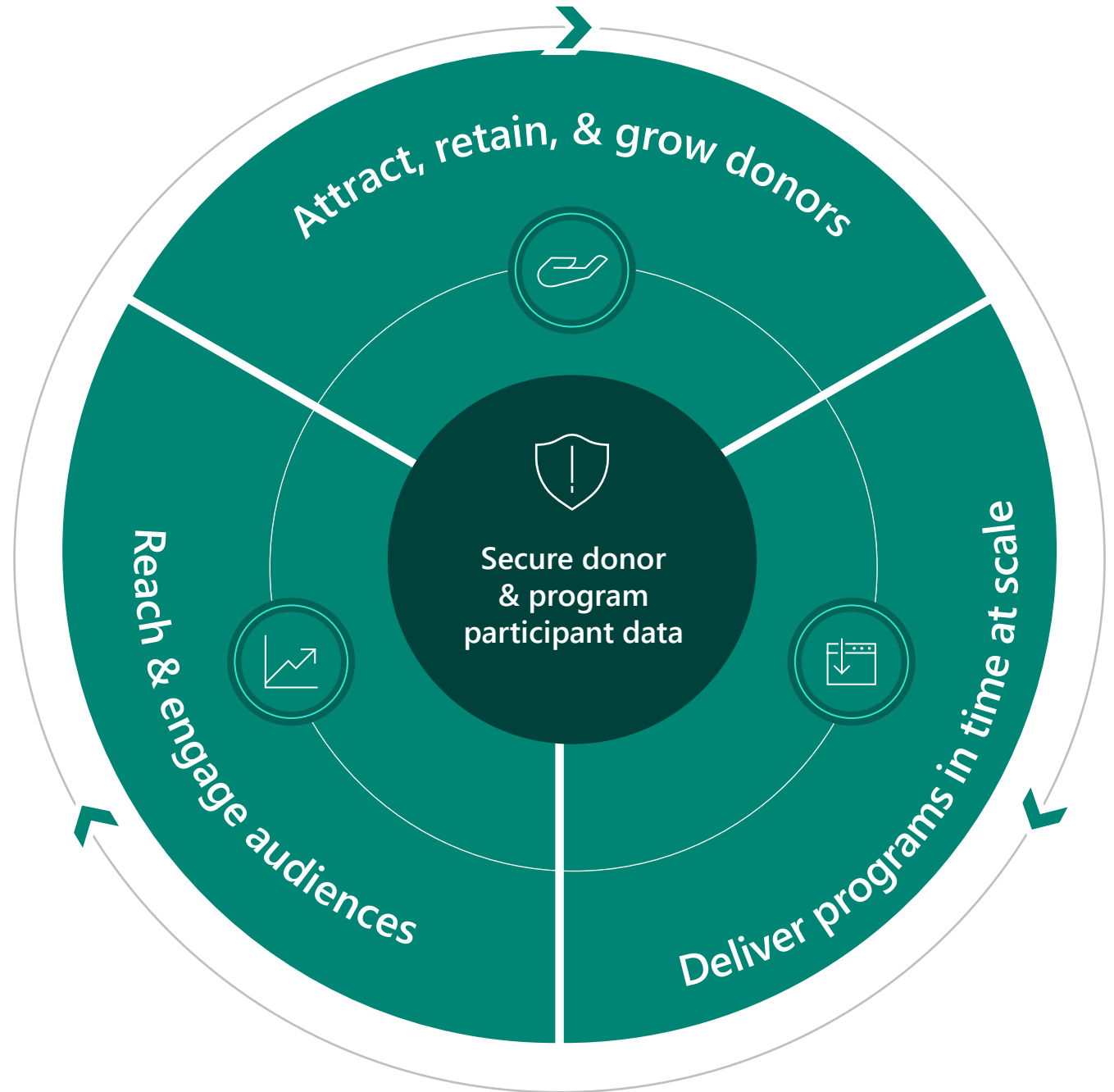
of the total world population  
has an active broadband  
subscription

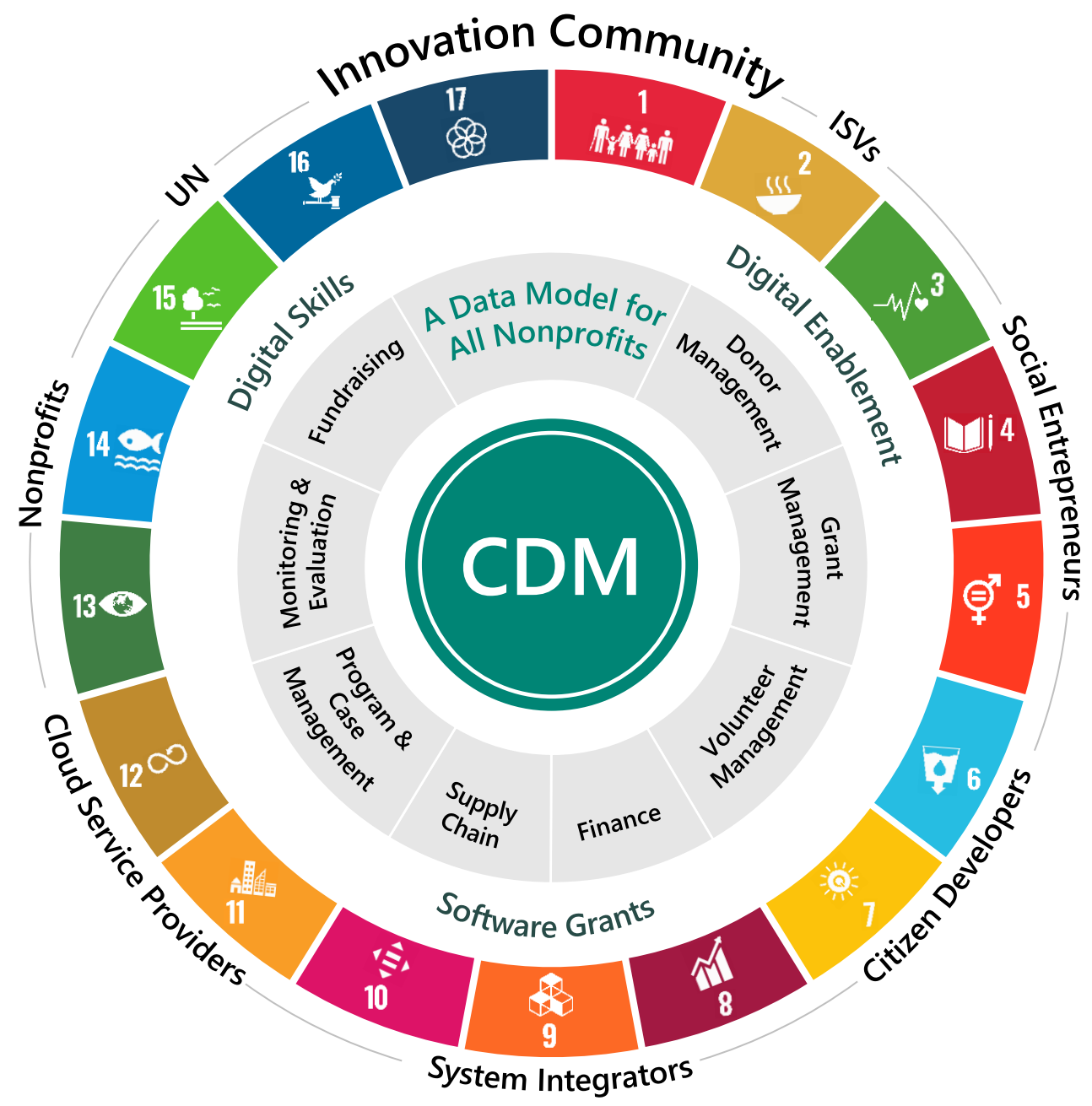
## Africa



Between '09-'20, Africa saw a 600% increase in broadband us

# Microsoft Cloud for Nonprofit vision





# How Microsoft makes it happen: The Nonprofit Common Data Model

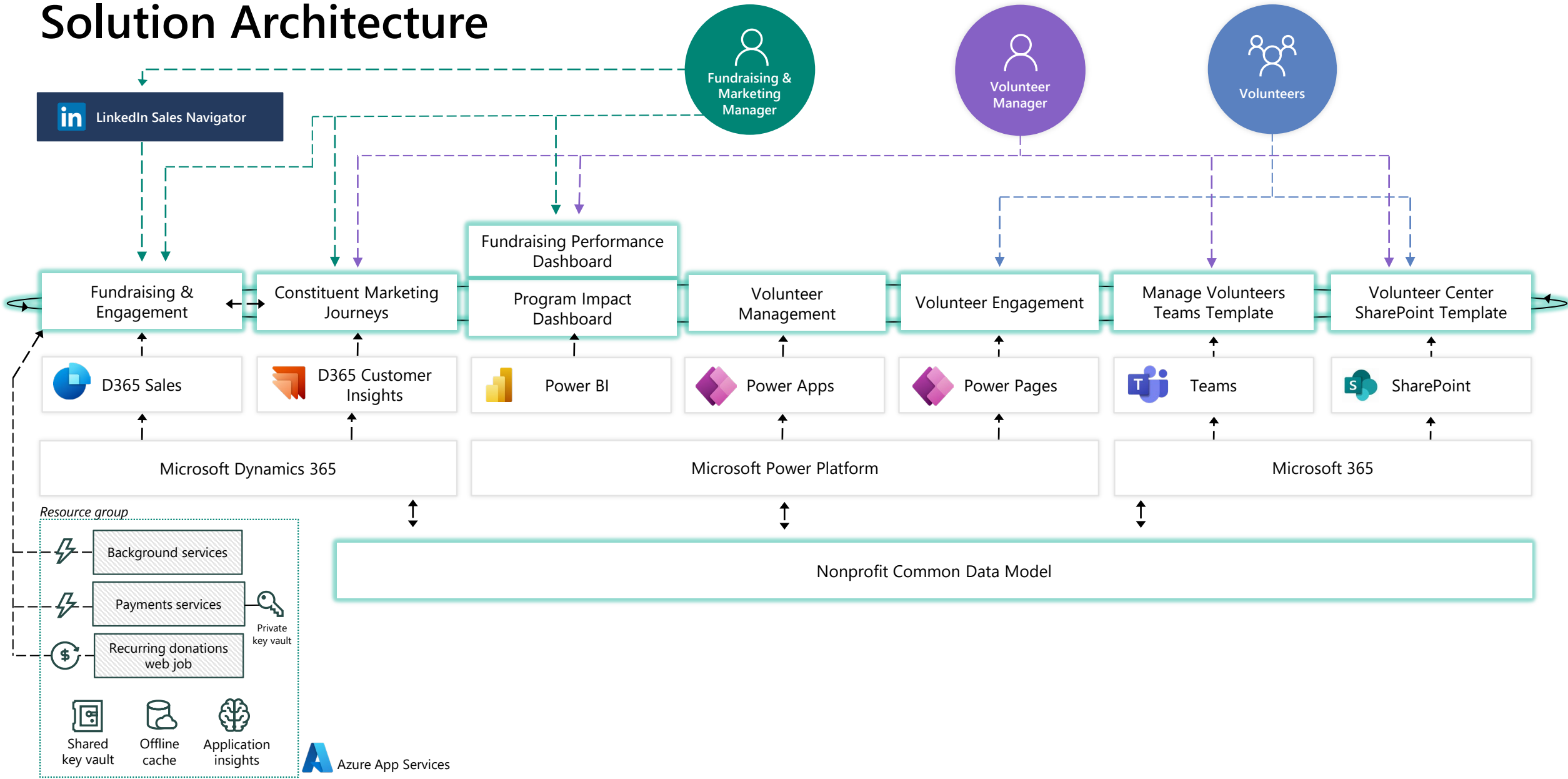
<b>Constituent Management</b>		<b>Donation Management</b>		<b>Grant and Award Management</b>	
<b>Account Management</b>	360-degree view and tracking of constituent's data to include profile, relationships, and complete history of engagement with the organization involving donations, communications, marketing, grants, case management, etc.	<b>Donation Processing</b>	Acknowledgement of donation, tracking pledges and donations from individuals and institutions to include one-time and recurring donations, GIK, grant payments, and bequests, restricted and unrestricted tracking, call center support, revenue recognition in the accounting system of record	<b>Award Management</b>	360-degree view of the award details to include the proposal, proposal budget, award budget, resource plan, respond to requests from the donor, book the award, set up payment schedule & deliverables, expenditures, monitoring program outcomes, documentation, & communications
<b>Fundraising</b>		<b>Payment Integration</b>	Integration with payment processing platform for all types of donations	<b>Sub-recipient Management</b>	Tracking of sub-recipients/sub-awards to the grant to include budgets, objectives, activities, performance, etc.
<b>Campaign Management</b>	Campaign creation—create campaign, identify goals, and track donations as a result of the campaign	<b>Volunteer Management</b>		<b>Results Tracking</b>	Set performance measures against each objective & track progress throughout the life of the grant
<b>Multi-channel Marketing</b>	<ul style="list-style-type: none"> <li>Market campaigns and events through various channels—To include email, websites, and social media</li> <li>Personalized outreach—Automatic notifications, individual emails, print communications, mass mailings, and target groups</li> </ul>	<b>Volunteer Lifecycle Management</b>	<ul style="list-style-type: none"> <li>Volunteer strategy—Identify program volunteer needs to include skills, number of volunteers, and timing</li> <li>Recruit, onboard, train, &amp; offboard— Get qualified volunteers to help program, provide training &amp; certifications, and offboard when the volunteer leaves</li> <li>Plan—Organize volunteers with sign-ups, scheduling, and assignment</li> </ul>	<b>Program Participant Management</b>	
<b>Program Delivery</b>		<b>Monitoring and Evaluation</b>		<b>Program Participant Management</b>	360-degree view of the services that the beneficiary has utilized, relationships staff and donations
<b>Define &amp; Track Programs from Strategy to Execution</b>	Define hierarchy of programs and projects and track activities, outputs, and outcomes to the programs and projects	<b>Results Measurement</b>	Outcomes tracking, log frames, measuring program efficacy	<b>Case Management</b>	A goal-oriented process handling cases from opening to closure, coordinating services between an individual and a case manager, providing services to an individual by assessing the needs of the individual and when appropriate arranges, coordinates, monitors, and evaluates
<b>Service Delivery</b>	Delivery of programmatic services directly to beneficiaries	<b>Predictive Analysis</b>	Using AI/machine learning and data mining aggregate program and operational data to gain insights		

## Insights & Analytics



# Microsoft Cloud for Nonprofit Solution Architecture

KEY   Microsoft Cloud for Nonprofit   Microsoft Product



Microsoft is the **only cloud provider** with tools and platforms across productivity, insights, and collaboration

1<sup>st</sup> Party IP built **just** for nonprofit

1<sup>st</sup> Party technology platforms and services that are **customizable and built for integration** by ISVs, SIs and for customer-build solutions

### Microsoft Cloud for Nonprofit



Microsoft 365

LinkedIn

Microsoft Dynamics 365

GitHub

Microsoft Power Platform

Microsoft Azure

Identity, security, management, and compliance

Accelerate time to value, speed up innovation, and drive benefits for customers, employees, and organization

# The Microsoft Nonprofit solution ecosystem

## Nonprofit capabilities

Fundraising and Engagement

Volunteer Management

Volunteer Engagement

Volunteer center

Manage volunteers

Constituent marketing  
journeys

Program impact dashboard

Fundraising performance  
dashboard

Microsoft Community Training

Connectors

Advisory Services

System Integrators

ISV cloud solutions

Nonprofit Capabilities

 Microsoft 365

 Microsoft Dynamics 365

 Microsoft Power Platform

 Microsoft Azure

 Common Data Model for Nonprofits

## ISVs

- Build industry or vertical specific solutions
- Build bespoke Nonprofit solutions
- Extend solutions built on top of the Microsoft Cloud for Nonprofit

## System Integrators, Advisory Services

- Provide expertise for customer, ISV, and industry ISV solutions
- Create their own or bespoke nonprofit industry solutions and tools
- Create industry vertical solution support and practices to help customers directly, or support ISV deliverables
- Provide strategic guidance for customers

# Microsoft Cloud for Nonprofit Solutions

## Donor Center of Excellence

Attract, retain, and grow donors



Fundraising and Engagement



Fundraising performance dashboard



Dynamics 365 Sales



Azure App Services



Power BI Pro

## Marketing Center of Excellence

Reach and engage audiences



Constituent marketing journeys



Azure Data & App Services

## Program Center of Excellence

Deliver programs in time at scale



Volunteer Management



Volunteer Engagement



Dynamics 365 Customer Service



Power Pages



Community Training



Power Apps

Microsoft 365

Azure Data & App Services

## Mission Center of Excellence

Secure donor & participant data



Dynamics 365 Business Central



Dynamics 365 Finance



Azure Data & App Services



Dynamics 365 Supply Chain Management

Microsoft 365



Power BI Pro

## Fundraising AI Solutions



Viva



Teams Premium



Dynamics 365 Copilot

Microsoft 365

Microsoft 365 Copilot

## Marketing AI Solutions



Dynamics 365 Customer Insights Copilot



Microsoft Copilot



Dynamics 365 Customer Insights Copilot

## Program AI Solutions



Power Platform Copilot



Community Training

## Finance & Ops AI Solutions



Azure Open AI

Microsoft 365

Microsoft 365 Copilot

Microsoft 365

Microsoft Security Copilot

## Nonprofit Common Data Model

Data & AI, M365 for Nonprofits, Security for Nonprofits: Account Guard, Purview, Priva, Defender, Entra, Sentinel

# What's new in Microsoft Cloud for Nonprofit

## Improved user experience and unified constituent data



### Nonprofit marketing

A collection of solutions intended to reach new and existing audiences through digital engagement. Allows for personalized donor interactions at scale with real-time, automated campaigns that reach donors, volunteers, and all your audiences across channels.



### AI for fundraisers

New AI-enabled features integrated with Fundraising and Engagement to empower fundraisers and increase productivity with AI-supported tools that streamline communications and strengthen donor relationships, while seamlessly connected to your Cloud for Nonprofit CRM



### Skilling on the go

Enable constituents to learn anytime, anywhere with their choice of device while still enjoying the Community Training platform self-paced learning modules.



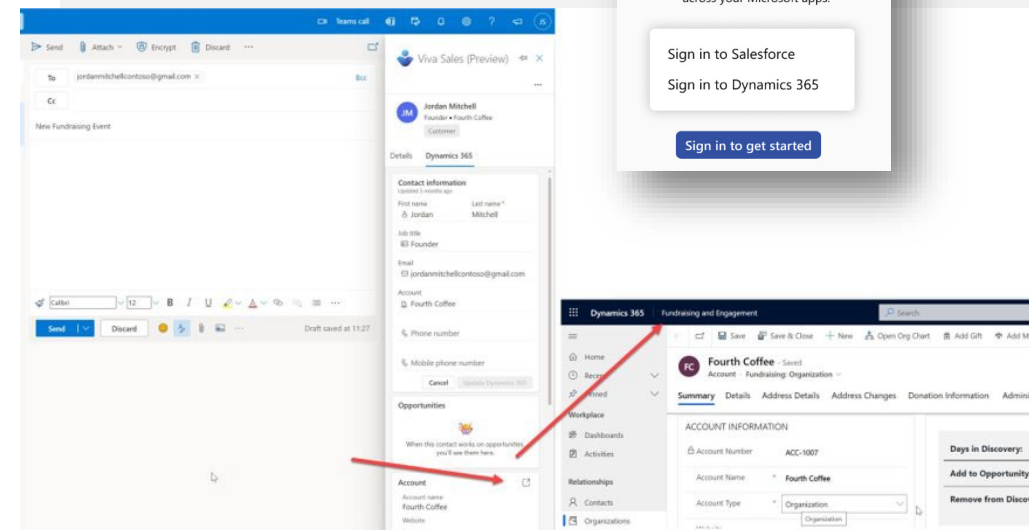
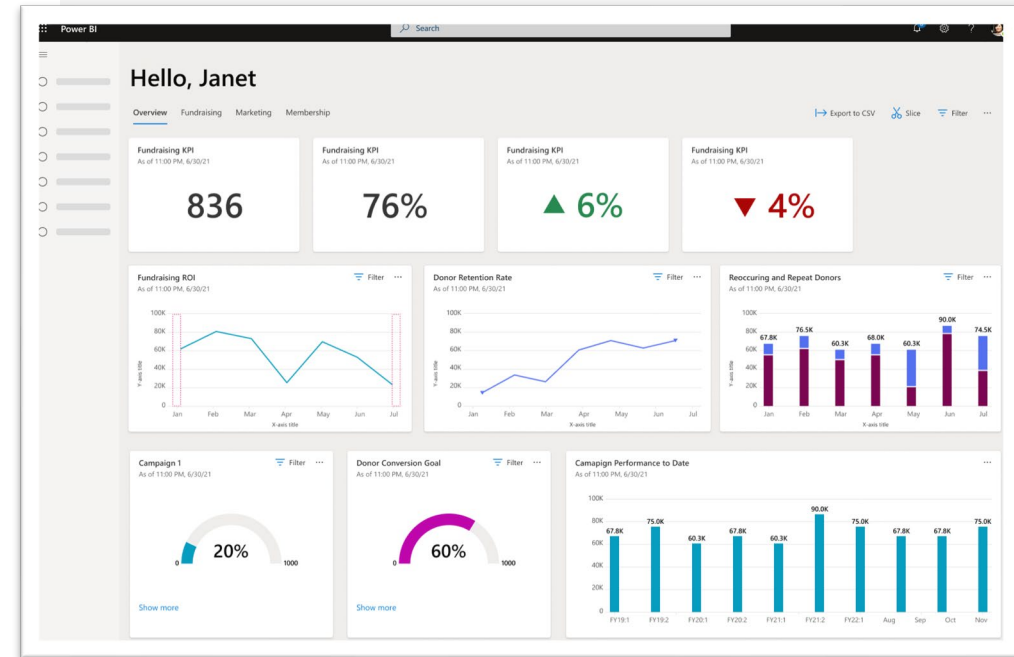
### Partner implementation and deployment services

Accelerate time to value with partner led implementation and deployment services. Choose from partner offered data migration assessments and services, Fundraising and Engagement & Dynamic 365 Marketing implementation, or enhance Fundraising and Engagement with online giving solutions.



### AI-infused program solutions

Now utilize AI functions such as call summaries, pre-populated notes, email suggestions and more connected through Microsoft Sales Copilot and Teams Premium



# We're the experts

Partner this your space to document the solution:

- *Position how your solution and services positively impact nonprofit operations*
- *Talk in language that they will understand*
- *Explain how you help your customers and look to build trust*

Partner logo,  
competency  
badge(s)

**Attract, retain, &  
grow donors**



# Attract, retain, & grow donors

Increase funding and support of your mission by aligning program needs with personalized supporter engagements

		Solutions
<b>CONSTITUENT MANAGEMENT</b>	Attract, retain, and grow donor and supporter bases	Fundraising and Engagement
<b>DONATION &amp; AWARD MANAGEMENT</b>	Payment processing, fund accounting, and designation management to support fundraising efficiency for simple to complex funding types. Partner supports for deployment of 3 <sup>rd</sup> party online fundraising and payment solutions	Fundraising and Engagement
<b>PERSONALIZED &amp; AI-ASSITED ENGAGEMENT</b>	Connect through compelling content via the most proven channels. Utilize AI to increase productivity	Constituent marketing journeys Microsoft Sales Copilot Likelihood to donate model

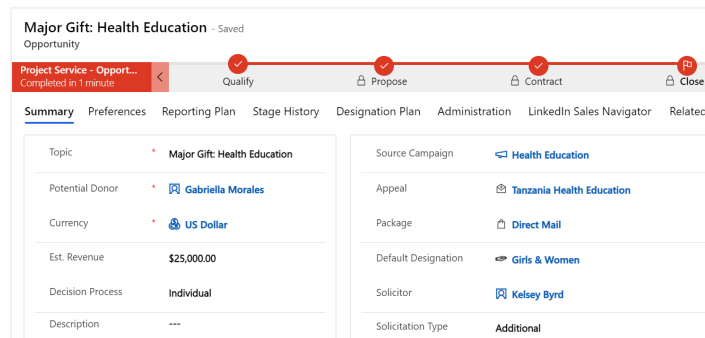


# Constituent management

Attract, retain, and grow donor and supporter bases.

## MOVES MANAGEMENT

Track and manage any type of gift opportunity, including grants, pledges, corporate sponsorships, and major gift solicitations.



Major Gift: Health Education - Saved  
Opportunity

Project Service - Opport...  
Completed in 1 minute

Qualify Propose Contract Close

Summary Preferences Reporting Plan Stage History Designation Plan Administration LinkedIn Sales Navigator Related

Topic Major Gift: Health Education

Potential Donor Gabriella Morales

Currency US Dollar

Est. Revenue \$25,000.00

Decision Process Individual

Description ---

Source Campaign Health Education

Appeal Tanzania Health Education

Package Direct Mail

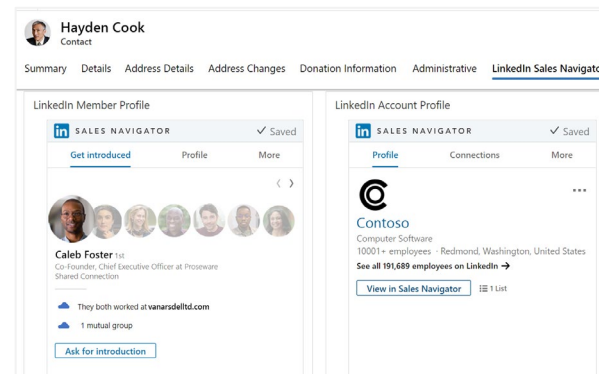
Default Designation Girls & Women

Solicitor Kelsey Byrd

Solicitation Type Additional

## CONSTITUENT RESEARCH

Use LinkedIn Sales Navigator within Fundraising and Engagement to leverage your organization's network for prospecting and warm introductions, surface real-time updates, and communicate via embedded messaging.



Hayden Cook  
Contact

Summary Details Address Details Address Changes Donation Information Administrative LinkedIn Sales Navigator

LinkedIn Member Profile

SALES NAVIGATOR Saved

Get introduced Profile More

Caleb Foster 1st  
Co-Founder, Chief Executive Officer at ProzeWare  
Shared Connection

They both worked at vanarsdeltd.com

1 mutual group

Ask for introduction

LinkedIn Account Profile

SALES NAVIGATOR Saved

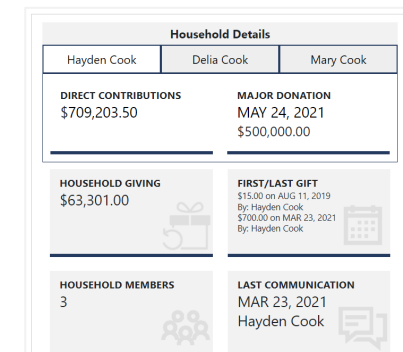
Profile Connections More

Contoso  
Computer Software  
1000+ employees · Redmond, Washington, United States  
See all 191,689 employees on LinkedIn →

View in Sales Navigator 1st List

## CONSTITUENT & HOUSEHOLD RECORDS

Capture the details you need across all constituent records. Fundraising and Engagement supports all constituents equally, with individual contacts on the same level as households and organizations.



Household Details

Hayden Cook Delia Cook Mary Cook

DIRECT CONTRIBUTIONS  
\$709,203.50

MAJOR DONATION  
MAY 24, 2021  
\$500,000.00

HOUSEHOLD GIVING  
\$63,301.00

FIRST/LAST GIFT  
\$15.00 on AUG 11, 2019  
By: Hayden Cook  
\$700.00 on MAR 23, 2021  
By: Hayden Cook

HOUSEHOLD MEMBERS  
3

LAST COMMUNICATION  
MAR 23, 2021  
Hayden Cook



# Donation and award management

Payment processing, fund accounting, and designation management to support fundraising efficiency for simple to complex funding types.

## GIFT MANAGEMENT

Rapidly accept and process donations in alignment with donors' giving preferences including recurring gifts, pledges, split payments, and one-off gifts.

## PAYMENT PROCESSING

Leverage payment processing powered by Azure and integration with popular credit card gateways including IATs, Moneris, and Stripe. Bank integration ACH and EFT processing.

## DESIGNATION MANAGEMENT

Use designations to enable seamless reconciliation and reporting. Gain an end-to-end view connecting donations to program activity.

Recurring - 36F26A - Saved  
Payment Schedule

Single Donation Form   General   Administration   Related

Payment Schedule Entry			
Gift Type	Recurring Dona	Book Date	10/29/2021
Payment Type	Bank (Ach)	Originating Campaign	Health Educati...
Donor	Gabriella M...	Primary Designation	Girls & Women
Amount	\$50.00		
Channel	Phone		



Designation	Girls & Women	Amount	100
Designation	Girls & Women	Amount	100
	<ul style="list-style-type: none"> <li>General Restricted</li> <li>General Unrestricted</li> <li>Girls &amp; Women</li> <li><b>Maternal Health</b></li> <li>Restricted (Advocacy)</li> <li>Restricted (Capital Projects)</li> <li>Tanzania Health Center</li> </ul>		

# Personalized engagement

Connect through compelling content via the most proven channels.

## CONSTITUENT SEGMENTS

Use out of the box segmentation for constituents based on their interactions and history with your organization. Segments include new donors, lapsed donors, new volunteers, lapsed volunteers, and suppression segments.

Active segments ▾
✓ Name ↑ ▾
Active Volunteers
Active Volunteers
DO NOT EMAIL Preference
Donated in last 30 days
Donated in last 60 days
Donated in the last 5 years
Donation given today
Donor who has never given recurring gift

## EMAIL TEMPLATES

Leverage a selection of pre-built email templates including newsletters, thank yous, and recurring gift asks.

**Contoso.org**  
Envisioning a healthier world

### Join our monthly giving club!

Dear {{ContactFullName}}

Thank you for supporting communities in need around the world by funding our global health equity projects. Donors like you create real, sustainable change through your generous giving.

Today we invite you to make your valuable support go even further becoming a monthly donor. As a monthly donor your support will help:

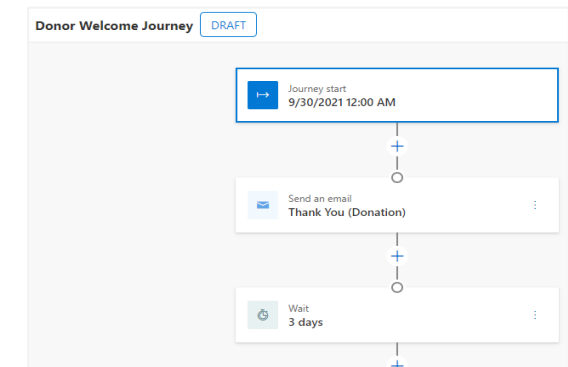
- **Fund free nutrition workshops** in communities that fall outside the Global Nutrition Reports recommended targets.
- **Fund training** for clinic staff and medical professionals for placement in understaffed communities.
- **Fund the purchase of critical supplies and technology** in underfunded clinics.

As a monthly donor you'll enjoy:

- A monthly **impact report** highlighting how your donations are being put to use.
- Easily managed **automatic payments** that can be paused at any time.

## AUTOMATED JOURNEYS

Save marketers from manual tasks using real-time, event-based journeys. Take advantage of prebuilt journeys for new donors, lapsed donors, and volunteers to automate outreach.



# Artificial Intelligence

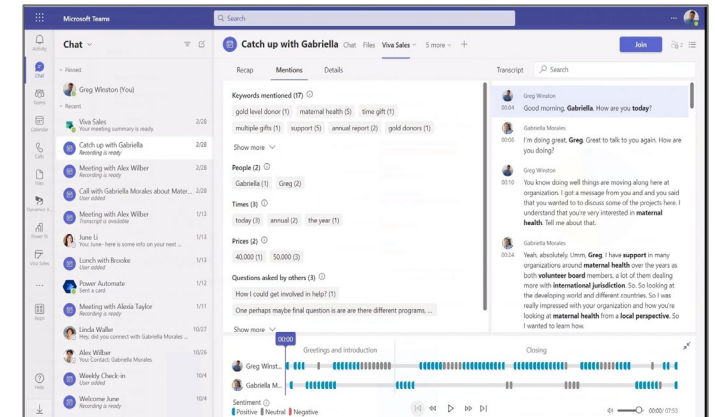
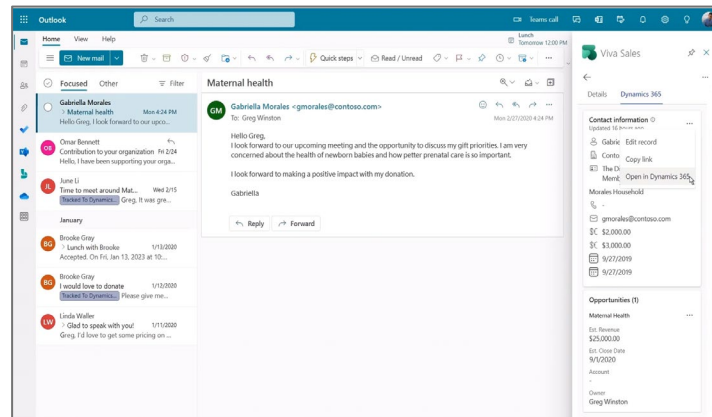
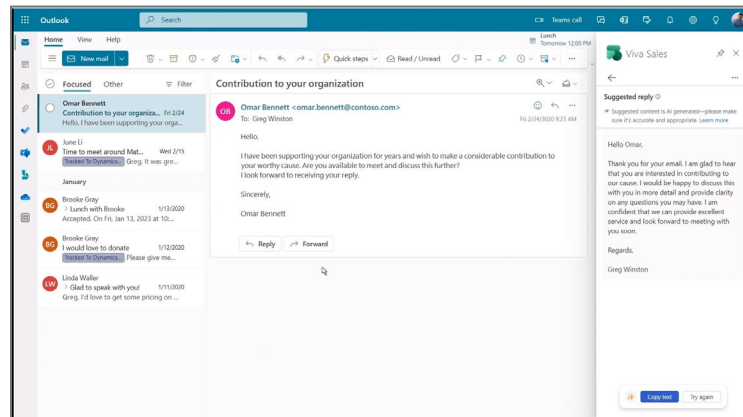
AI-infused solutions to empower fundraisers towards donor connection and increased productivity with Microsoft Sales Copilot connection to Dynamic 365 and Teams Premium.

## AI FEATURES

- AI-generated email replies
- AI-generated notes and sentiment analysis (Teams)
- AI-generated real-time insights
- Connected CRM data and capabilities

## REDUCE

- Data entry
- Time developing content/messaging
- Team information search and communication churn



**Deliver programs  
in time at scale**



# Deliver programs in time at scale

Empower staff and volunteers to deliver measurable and responsive programs based on community needs.

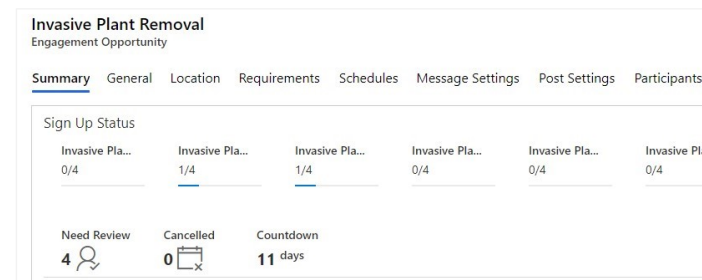
		Solutions
<b>VOLUNTEER COORDINATION</b>	Move away from spreadsheets, documents, and systems built for donors and program participants to solutions built specifically for volunteers	<ul style="list-style-type: none"><li>• Volunteer Management</li><li>• Manage volunteers Teams template</li></ul>
<b>VOLUNTEER EXPERIENCE</b>	Make volunteering easy with a one-stop shop for volunteers to view engagement details, complete training and onboarding, and find future opportunities	<ul style="list-style-type: none"><li>• Volunteer Engagement</li><li>• Volunteer center SharePoint template</li><li>• Community Training</li></ul>
<b>KNOW VOLUNTEERS</b>	Better understand the people who serve your organization and their volunteer journey, from event attendance to attrition levels to donor conversion	<ul style="list-style-type: none"><li>• Volunteer Management</li><li>• Volunteer Engagement</li><li>• Fundraising and Engagement</li><li>• Constituent marketing journeys</li></ul>

# Streamline volunteer coordination – Volunteer Management

Enable volunteer managers to move away from spreadsheets, documents, and systems built for donors and program participants to solutions built specifically for volunteers.

## VOLUNTEER ENGAGEMENT OPPORTUNITIES

Manage engagement opportunities in one central place. Capture information including date, location, number of volunteers needed, and the skills and training required.



**Invasive Plant Removal**  
Engagement Opportunity

Summary | General | Location | Requirements | Schedules | Message Settings | Post Settings | Participants

Sign Up Status

Invasive Pla...	Invasive Pla...	Invasive Pla...	Invasive Pla...	Invasive Pla...	Invasive Pla...
0/4	1/4	1/4	0/4	0/4	0/4

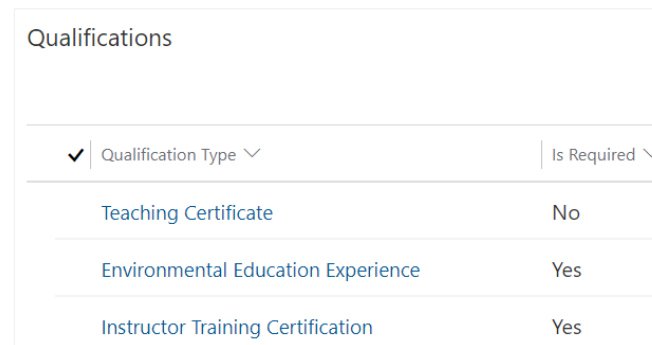
Need Review: 4

Cancelled: 0

Countdown: 11 days

## QUALIFICATIONS & REQUIREMENTS

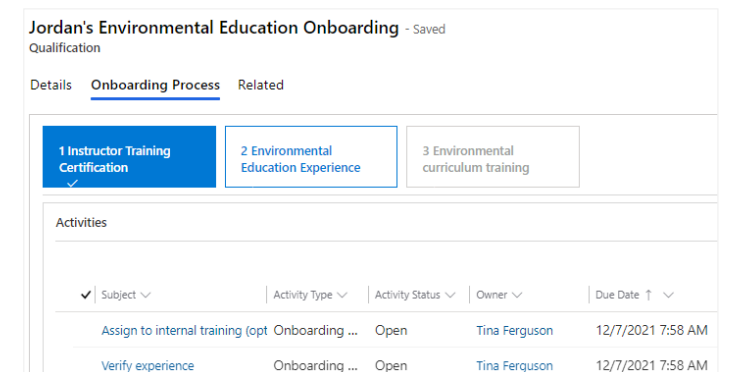
Match the right volunteer to the right opportunity by outlining the required background and experience volunteers need for each engagement opportunity.



Qualification Type	Is Required
Teaching Certificate	No
Environmental Education Experience	Yes
Instructor Training Certification	Yes

## ONBOARDING & TRAINING

Set up consistent onboarding processes to better manage and track the volunteer onboarding experience. Outline onboarding stages, associated activities, and staff members responsible.



**Jordan's Environmental Education Onboarding** - Saved  
Qualification

Details | Onboarding Process | Related

1 Instructor Training Certification	2 Environmental Education Experience	3 Environmental curriculum training
<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Activities

Subject	Activity Type	Activity Status	Owner	Due Date
Assign to internal training (opt Onboarding ...	Onboarding ...	Open	Tina Ferguson	12/7/2021 7:58 AM
Verify experience	Onboarding ...	Open	Tina Ferguson	12/7/2021 7:58 AM

# Streamline volunteer coordination – Manage volunteers

Enable volunteer managers to move away from spreadsheets, documents, and systems built for donors and program participants to solutions built specifically for volunteers.

## INTEGRATION WITH VOLUNTEER MANAGEMENT

Manage volunteer engagement opportunities directly within Teams to save staff time from flipping back and forth between applications.

## CHANNELS

Use pre-configured channels to organize and share onboarding materials and frequently – used documents, view reporting, make team announcements, and more.

## APPS

Centralize apps for the team to use including Tasks, SharePoint, OneNote, and many others.

### Manage Volunteers

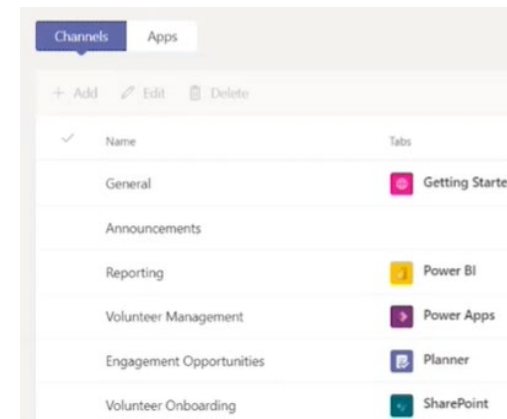
Manage documents and information for volunteer onboarding and engagement. Optional connection to Microsoft Volunteer Management solution.

#### 4 channels

- General
- Announcements
- Engagement Opportunities
- Reporting
- Volunteer Onboarding

#### 5 apps

- Power Apps
- PowerBI
- OneNote
- SharePoint (when available)





# Improve the volunteer experience – Volunteer Engagement

Make volunteering with your organization easy by providing a one-stop shop for volunteers to view engagement details, complete training and onboarding, and find future opportunities.

## ENGAGEMENT OPPORTUNITY SEARCH

Volunteers can easily search for engagement opportunities that match their location, availability, interest areas, and skills.

Filters

City or State

Start Date

End Date

Preferences

- Community
- Disaster Response
- Environmental Education
- Family Friendly

Qualifications

- Environmental Education Experience
- Handling Food Safely Certification

## VOLUNTEER PROFILE

Enable volunteers to create and update their profiles with contact information to highlight talent and skills, and availability.

Profile

### Jordan Mitchell

Contact Information

First Name \* Jordan Last Name \* Mitchell

Phone 823-439-0983 Email \* j.mitchell@outlook.com

Address (Line 1) Helper text

Address (Line 2) Helper text

City Seattle State/Province WA

Zip/Postal Code 98056 Country United States

Profile

- Contact Information
- Availability
- Preferences & Qualifications
- Security

Change Password

Change Email

Manage External Authentication

## ENGAGEMENT SUMMARY

Let volunteers see how they have contributed toward your organization's mission, by viewing the status of upcoming engagements, a record of past engagements, and the number of hours they've spent delivering programs and services.

### My Engagements

52 Total Hours | 12 Attended

Upcoming Past

Sort by Start Date

Saturday, May 8, 2021  
**Invasive Plant Removal**  
On Location - Des Moines, WA  
Accepted  
Select a Time Shift

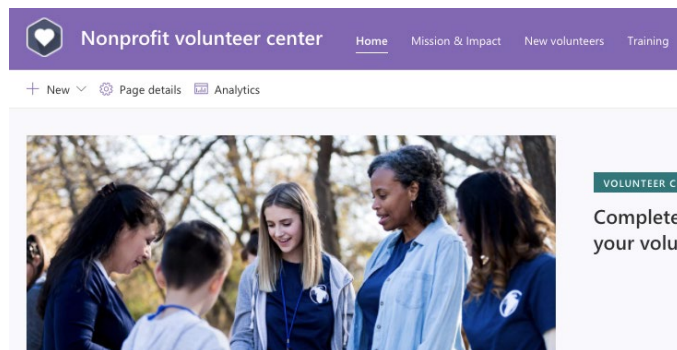
Saturday, May 2, 2021  
**Community Garden**  
On Location - Des Moines, WA  
Registered to Attend  
Sat, May 2 10:00 AM - 12:00 PM

# Improve the volunteer experience – Volunteer center

Make volunteering with your organization easy by providing a one-stop shop for volunteers to view engagement details, complete training and onboarding, and find future opportunities.

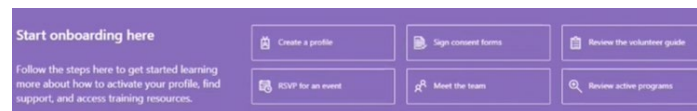
## PRE-POPULATED PAGES

Leverage pre-populated images, web parts, and content to inspire site editors.



## QUICK LINKS

Provide links to both internal and external sites to give volunteers access to training and onboarding materials and other key sites and resources.



## NEWS & ANNOUNCEMENTS

Alert volunteers to organizational news, event updates, and other important information.

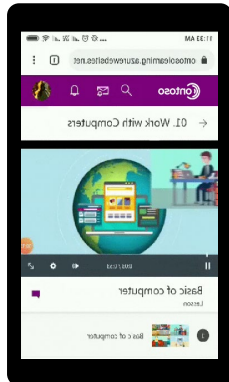


# Improve the volunteer experience – Community Training

Make volunteering with your organization easy by providing a one-stop shop for volunteers to view engagement details, complete training and onboarding, and find future opportunities.

## SKILLING ON THE GO

Enable learners to take courses online, in low-bandwidth environments, and even offline.



## USER MANAGEMENT PORTAL

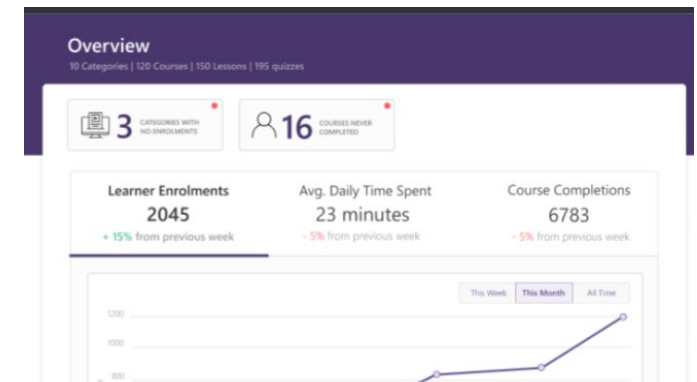
Get all user management functionalities in a single pane. Add users, create groups, assign courses, track progress, and much more.

A user management portal dashboard for a user named Gaines, Georgia E. The dashboard shows a profile card with a photo and contact information (+27 832140633). Below the profile are three key metrics: Avg. Quiz Score (70%), Modules Completed (6), and Modules Enrolled (9). At the bottom, there is a table of enrolled modules.

Module Name ↑	Average Quiz Score %	% Course Progress
01. Work with Computers	60	60

## ANALYTICS

Use out of the box analytics to track progress in learning, course completion, and engagement and performance of learners.

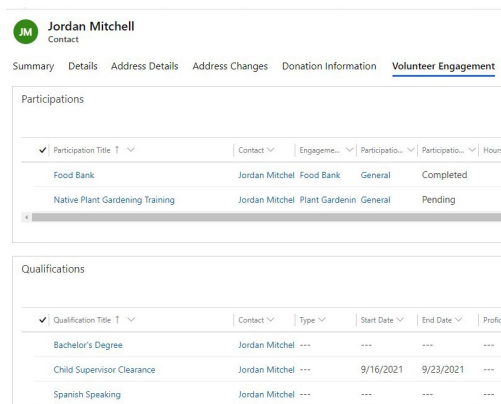


# Know your volunteers

Better understand the people who serve your organization and their volunteer journey, from event attendance to attrition levels to donor conversion.

## COMPREHENSIVE RECORDS

With the Nonprofit CDM creating a single source of truth, constituent information is unified across Volunteer Management, Volunteer Engagement, and Fundraising and Engagement. Understand which donors are also volunteers and what other segments they belong to.



**JM Jordan Mitchell**  
Contact

Summary Details Address Details Address Changes Donation Information **Volunteer Engagement**

Participations

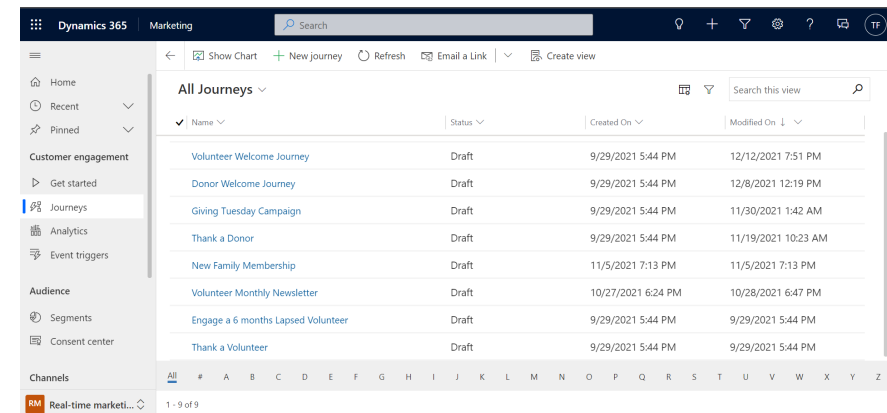
Participation Title	Contact	Engagement	Participation Type	Participation Status	Hours
Food Bank	Jordan Mitchell	Food Bank	General	Completed	
Native Plant Gardening Training	Jordan Mitchell	Plant Gardenin	General	Pending	

Qualifications

Qualification Title	Contact	Type	Start Date	End Date	Profile
Bachelor's Degree	Jordan Mitchell	---	---	---	---
Child Supervisor Clearance	Jordan Mitchell	---	9/16/2021	9/23/2021	---
Spanish Speaking	Jordan Mitchell	---	---	---	---

## VOLUNTEER JOURNEYS

Use automated marketing journeys to engage volunteers based on their history and interactions with your organization. Leverage pre-built journeys for new volunteers and lapsed volunteers, as well as sending monthly newsletters.



Dynamics 365 Marketing

All Journeys

Name	Status	Created On	Modified On
Volunteer Welcome Journey	Draft	9/29/2021 5:44 PM	12/12/2021 7:51 PM
Donor Welcome Journey	Draft	9/29/2021 5:44 PM	12/8/2021 12:19 PM
Giving Tuesday Campaign	Draft	9/29/2021 5:44 PM	11/30/2021 1:42 AM
Thank a Donor	Draft	9/29/2021 5:44 PM	11/19/2021 10:23 AM
New Family Membership	Draft	11/5/2021 7:13 PM	11/5/2021 7:13 PM
Volunteer Monthly Newsletter	Draft	10/27/2021 6:24 PM	10/28/2021 6:47 PM
Engage a 6 months Lapsed Volunteer	Draft	9/29/2021 5:44 PM	9/29/2021 5:44 PM
Thank a Volunteer	Draft	9/29/2021 5:44 PM	9/29/2021 5:44 PM



And now with the integration that Microsoft presented to us we are able to cut out multiple steps, in fact, hours out of our day and that equates to having more families in their homes.

**Elliot Rios**, Clay Hunt Fellow, Team Rubicon, Veterans US Maine Corps



# Reach and Engage Audiences

The background features a dark teal color on the left side, transitioning into a lighter teal on the right. On the right side, there are several overlapping, curved shapes that resemble stylized waves or concentric arcs, creating a sense of movement and depth.



# Reach and Engage Audiences

Improve evidence-based decision making through connected organization-wide data powered by rich data capabilities, AI, and machine learning.

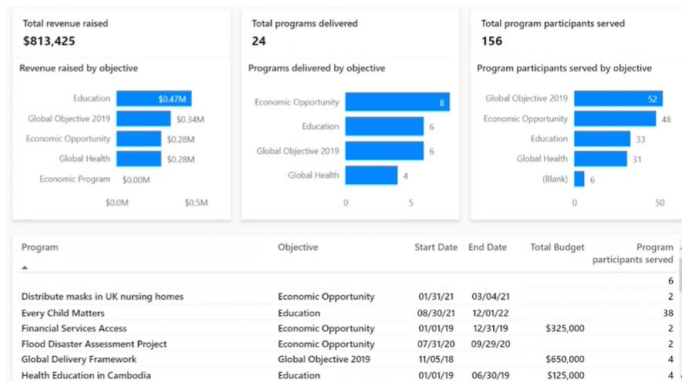
<b>UNIFIED DATA</b>	Unify fundraising, program, finance, operations, and disparate data across the back-office and frontline	<b>Solutions</b> <ul style="list-style-type: none"><li>• Program impact dashboard</li><li>• Fundraising performance dashboard</li><li>• Salesforce connector</li></ul>
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# Unified data

Unify fundraising, program, finance, operations, and disparate data across the back-office and frontline.

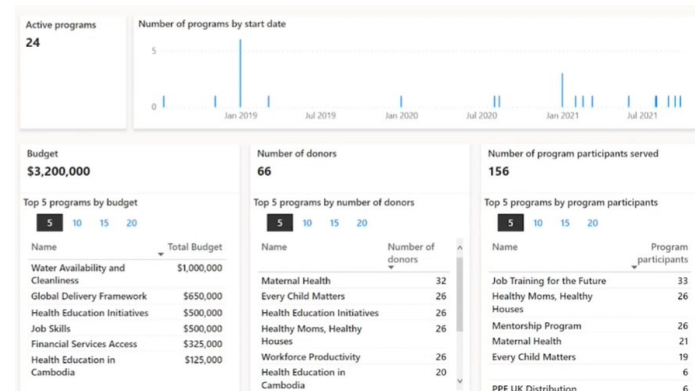
## IMPACT DELIVERED

Get a holistic view of your organization's overall programs, the revenue and funds raised aligned to those programs, and program participants served. Use this info for reports to leadership teams, board, and a starting point for annual impact reports.



## PROGRAM SUMMARY

Allow program staff to deep dive into program metrics including the top programs by budget, number of donors, and number of program participants.



## PROGRAM IMPACT

Understand individual programs' objectives, indicators, results, and the number of program participants. This will help program managers communicate the impact of their work and fundraisers with communicating the outcome of donors' funds.

Program: **Water Availability and Cleanliness**

**Objective:** This is the top level objective for the period - other sub-objectives are linked to this parent objective.

**Budget:** \$1,000,000

**Total revenue raised:** \$35,251

Result (Group)	Result	Indicator	Indicator value	Baseline Value	Amount (Base)	Number	Percent
6.1 By 2030, achieve universal and equitable access to safe and affordable drinking water for all	6.1.1 Proportion of population using safely managed drinking water services	Access to safely managed drinking water	Safe potable water access		100.00	75	75.0%
<b>Total</b>					<b>100.00</b>	<b>75</b>	<b>75.0%</b>
6.4 By 2030, substantially increase water-use efficiency across all sectors and ensure sustainable withdrawals and supply of freshwater to address water scarcity and substantially reduce	6.4.2 Level of water stress: freshwater withdrawal as a proportion of available freshwater resources	Freshwater withdrawal as a proportion of available resources	Freshwater withdrawal ratio		100.00	70	70.0%
	6.4.1 Change in water-use efficiency over time	Improved water use efficiency	Percentage of water used efficiently		100.00	45	45.0%
<b>Total</b>					<b>200.00</b>	<b>115</b>	<b>115.0%</b>



# Harness the power of your fundraising data

Make better business decisions in a cost-effective way using Azure's vast array of tools and services

## DATA ARCHIVING

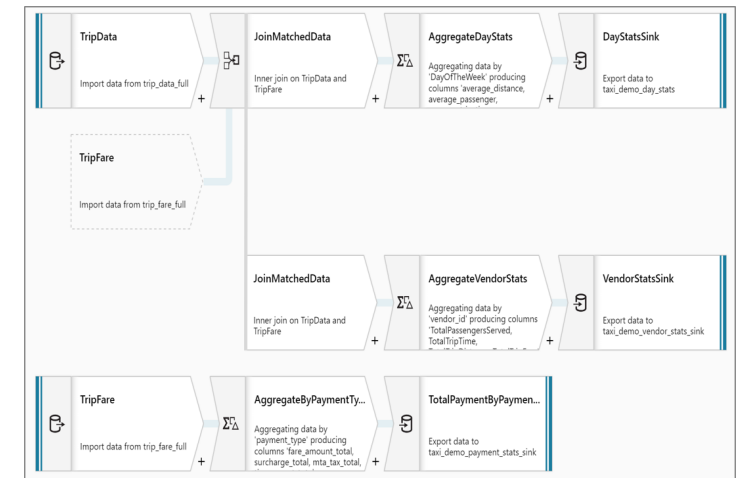
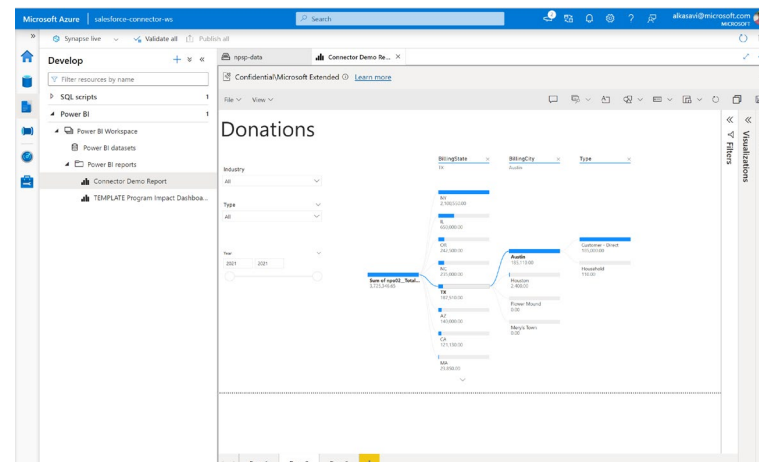
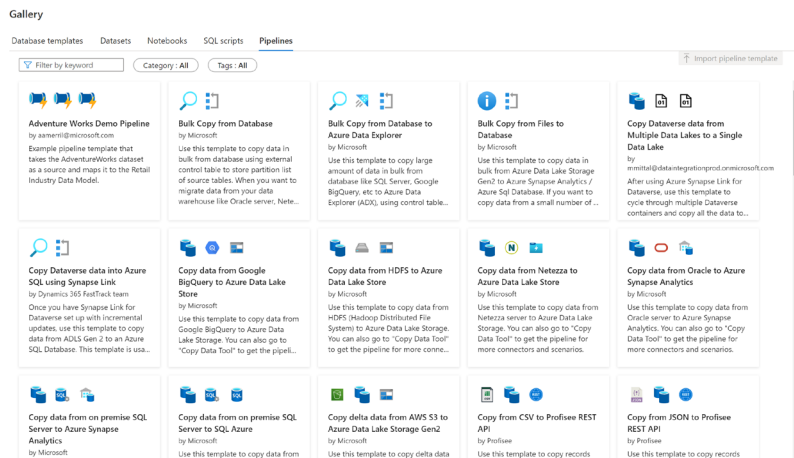
Reduce costs and improve performance by archiving data. Azure provides durable, secure, and highly available cloud storage for rarely accessed data for only a few dollars a month, enabling organizations to repurpose storage infrastructure for other critical business objectives.

## ANALYTICS

Improve reporting and decision making by turning your data into actionable insights with AI-driven analytics.

## MAPPING AND INTEROPERABILITY

Enhance operational effectiveness and efficiency across functions by consolidating data from different applications into a single pane of glass.



Seamless & Secure  
Finance & Operations

# Security Program for Nonprofits

Partners insert your own program here  
Or integrate with this slide

## AccountGuard for Nonprofits



- Unified threat monitoring and notification
  - Notification when organizations are targeted or compromised by nation-state attackers
  - Covers organizations (O365) and personal (Outlook & Hotmail) email accounts
- Sign up for AccountGuard in your [nonprofit hub](#)

## Security Assessment



- Free security assessments for nonprofit organizations
- Evaluate your security risks and identify an action plan to better protect your organization
- Determine cloud optimization opportunities

## Security Training for end users & IT pros



- For non-IT employees
  - [Protect yourself from online scams and attacks \(microsoft.com\)](#)
  - [Work from home more securely \(microsoft.com\)](#)
  - [Be safer over wireless connections \(microsoft.com\)](#)
  - [Intro to cybersecurity](#)
- For IT administrators
  - [Microsoft 365 Administrator's Security Toolkit](#)
  - [Security collection on MS Learn](#)
  - [Security Skilling Hub](#)
  - [Security Virtual Training Days](#)

**PARTNER: THIS SECTION HAS EXAMPLE SLIDES YOU CAN MODIFY OR DELETE THESE SLIDES AND INSERT YOUR OWN.**

## How it works

# Prerequisites | Microsoft Cloud Services licensing map

Nonprofit scenario	Capability	Microsoft 365		Power Platform		Viva	Microsoft Dynamics 365			Microsoft Azure
		Teams	SharePoint	Power Apps	Power BI	Microsoft Sales Copilot	Sales Enterprise	Marketing	Customer Insights	App Service
Attract, retain, and grow donors	Fundraising and Engagement	◆			◆	◆	●	◆		●
	Fundraising performance dashboard				●		◆			
Reach and engage audiences	Constituent marketing journeys						●	●	◆	
Deliver programs in time at scale	Volunteer Management	◆		●						
	Volunteer Engagement			●*						
	Manage volunteers	●								
	Volunteer center		●							
	Community Training									●
	Program impact dashboard				●		◆			

Legend:

●	Prerequisite	◆	Recommended
---	--------------	---	-------------

\* [Power Pages](#) required. Quantity dependent on volunteer volume.

# Additional value-added services

Partner to fill in, examples include the following:

- Migration assistance
- Training *(think how you can utilize what Microsoft offers)*
- Work from home solutions and hardware
- On-going support to get the most out of the cloud service
- Microsoft Cloud for Nonprofit *e.g., Volunteer Management & Engagement*
- Security Assessments
- Etc.

Partner logo,  
competency  
badge(s)



# Microsoft Cloud for Nonprofit

One organization. One mission. One platform.



## Connected data

Utilize connected, real-time data for decision making



## Interoperable

Remove silos with solutions that integrate seamlessly



## Modular & extensible

Adopt solutions that scale with your organizational needs



## Long-term value

Maximize technology investments



## Security, compliance, and privacy

Protect sensitive information, rely on robust compliance platforms, and trust your data is private

# Next steps

**Partner this is your space to document your success with the solution and add your nonprofit customer stories, add your own demos, etc.**

1 Ask for a demo

---

2 Watch our [Microsoft Cloud for Nonprofit Demo Series](#)  
(available on-demand)

---

3 Check out Fundraising and Engagement available today  
Website: [Fundraising and Engagement](#)  
Guided Tour: [Fundraising and Engagement Guided Tour](#)

---

4 Check out Volunteer Management and Volunteer Engagement  
Website: [Deliver Programs in time at scale](#)  
Guided Tour: [Volunteer Management Guided Tour](#)





# Thank you

 ADD your LinkedIn profile

ADD your email

[Microsoft.com/nonprofits](https://Microsoft.com/nonprofits)

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# Appendix

# Microsoft Cloud for Nonprofit Solutions:



**Chief Development Officer**  
**Donor Center of Excellence**  
*Attract, retain, and grow donors*

Fundraising and Engagement
 Fundraising performance dashboard
 Dynamics 365 Sales
 Power BI Pro
 Microsoft Sales Copilot
 Azure App Services
 Teams Premium (AI)



**Chief Marketing Officer**  
**Marketing Center of Excellence**  
*Reach and engage audiences*

Constituent marketing journeys
 Dynamics 365 Customer Insights
 Azure Data &amp; App Services



**Chief Program Officer**  
**Program Center of Excellence**  
*Deliver programs in time at scale*

Volunteer Management
 Volunteer Engagement
 Power Apps
 Power Pages
 Microsoft 365
 Community Training
 Dynamics 365 Customer Service
 Azure Data &amp; App Services



**Chief Operating/Information/  
Finance Officer**  
**Mission Center of Excellence**  
*Secure donor & participate data*

Dynamics 365 Business Central
 Dynamics 365 Finance
 Microsoft 365
 Power BI Pro
 Dynamics 365 Supply Chain Management
 Azure Data &amp; App Services

Nonprofit Common Data Model

Data & AI, M365 for Nonprofits, Security for Nonprofits: Account Guard, Purview, Priva, Defender, Entra, Sentinel

# Fundraising and Engagement

Modernize donor and constituent engagement to increase mission impact.

## Includes

- Constituent & household management
- Opportunity management & donor stewardship
- Donation & designation management
- Campaign, appeal, package, & marketing list management
- Designation management
- Recurring gift management
- Constituent research powered by LinkedIn Sales Navigator
- Event management
- Unified constituent profiles across Volunteer Management, Volunteer Engagement, and Dynamics 365 Customer Insights
- Reporting via views and embedded PowerBI templates
- Transaction processing powered by Azure

## Product Requirements:

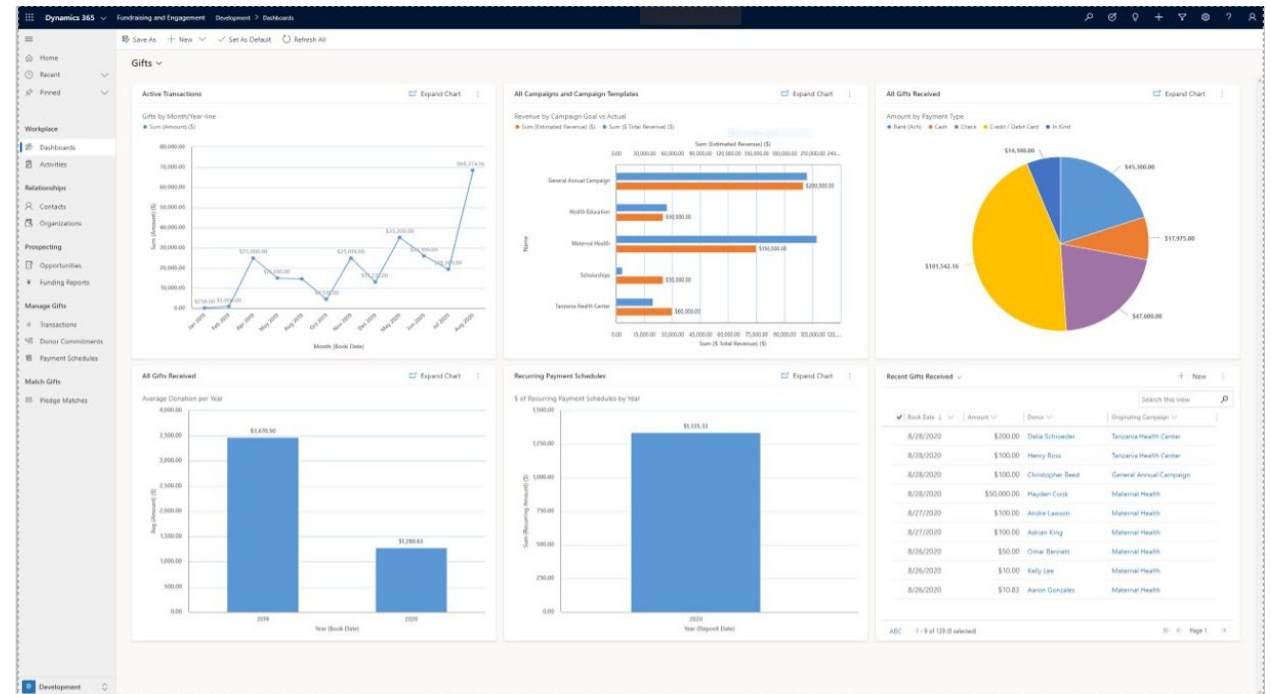
- Dynamics 365 Sales Enterprise
- Azure

Fundraising and Engagement

Dynamics Sales Enterprise

Azure

Nonprofit Common Data Model



# Constituent marketing journeys

Enable nonprofit marketing teams to personalize their outreach to donors and volunteers based on their history and interactions with your organization

## Includes

- Campaign segments
  - Donor segmentation
  - Volunteer segmentation
  - Suppression segments
- Email templates
  - Acknowledgements
  - Newsletter
  - Recurring gift conversion
- Constituent journeys
  - Welcome journeys for new donors and volunteers
  - Lapsed recapture

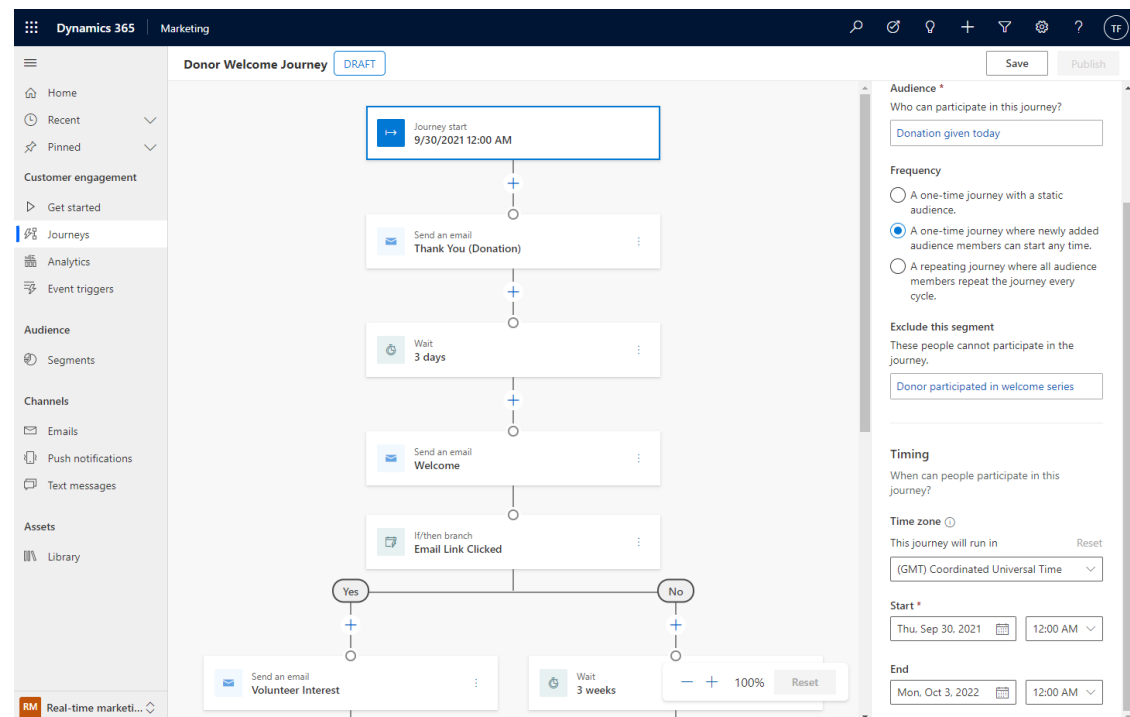
## Product Requirements:

- Fundraising and Engagement
- Dynamics Marketing

Constituent marketing journeys

Dynamics 365 Customer Insights

Nonprofit Common Data Model



# Likelihood to Donate

Extend segmentation and donor campaign capabilities included in Fundraising and Engagement

## Overview

Engage donors with AI-supported constituent donation insights and segmentation

## Features:

- Calculated donor likelihood scores
- Donor insights contributing to likelihood status
- Customizable fields and donor categories
- Connection to segmentation building with Dynamics 365 Customer Insights

This screenshot shows a list of donors in the Dynamics 365 interface. A filter overlay is visible on the right side of the list, showing likelihood levels: Most likely (yellow), Highly likely (orange), and Early likely (red). The list columns include Full name, Likelihood, Estimated amount, Email, Job title, Household, Last donation, and Last engagement.

Full name	Likelihood	Estimated amount	Email	Job title	Household	Last donation	Last engagement
Daren Moulton	Most likely	\$4,000	something@email.com	Security Researcher	Moulton household	\$1,400	14 days ago
Kayo Misa	Highly likely	\$1,500	something@email.com	Senior Designer		\$600	5 months ago
Aadi Kopper	Highly likely	\$10,000	something@email.com	Landscaper Architect	Kopper household	\$9,000	5 months ago
Aaron Bunton	Most likely	\$500	something@email.com			\$100	3 months ago
Gabriela Morales	Most likely	\$700	something@email.com	Construction Manager		\$500	3 months ago
Martha Monroe	Highly likely	\$7,000	something@email.com	Project Manager	Monroe household	\$600	28 days ago
Leah Astreda	Highly likely	\$2,400	something@email.com	Artist	Astreda household	\$1,200	1 month ago
Lucian LaChance	Highly likely	\$1,400	something@email.com	Police Captain		\$2,000	14 days ago
Karin Bar	Highly likely	\$1,200	something@email.com	Program Manager		\$3,000	14 days ago
Chlan Dupree	Highly likely	\$200	something@email.com	Technical Writer		\$200	1 year ago
Kyral McKinney	Highly likely	\$9,000	something@email.com	Author		\$2,000	32 days ago
Cassandra Dun	Most likely	\$1,000	something@email.com	Business Owner	Madison household	\$500	1 year ago
Laurenne Gilberstein	Highly likely	\$5,400	something@email.com	Human Resources		\$1,000	14 days ago
Ray Tanaka	Most likely	\$1,600	something@email.com	Integration Specialist	Tanaka household	\$600	5 months ago
Bruno Zhao	Highly likely	\$1,300	something@email.com	Art Director		\$900	2 months ago
Will Little	Highly likely	\$2,000	something@email.com	Real Estate Broker		\$50	28 days ago
Andie Lawson	Highly likely	\$800	something@email.com	Career		\$900	32 days ago
Account Executive	Most likely	\$3,000	something@email.com	Account Executive	Mc Crain household	\$1,000	3 months ago

This screenshot shows a similar list of donors, but with a different filter overlay on the right. The filter overlay includes options for 'Likelihood category' (Most likely, Highly likely, Early likely, Not likely, Not confident, Not analyzed) and 'Giving levels' (Major gift, Gold, Silver, Bronze, Contributor). The list columns are the same as in the previous screenshot.

Full name	Likelihood	Estimated amount	Email	Job title	Household	Last donation	Last engagement
Daren Moulton	Most likely	\$4,000	something@email.com	Security Researcher	Moulton household	\$1,400	14 days ago
Kayo Misa	Highly likely	\$1,500	something@email.com	Senior Designer		\$600	5 months ago
Aadi Kopper	Highly likely	\$10,000	something@email.com	Landscaper Architect	Kopper household	\$9,000	5 months ago
Aaron Bunton	Most likely	\$500	something@email.com			\$100	3 months ago
Gabriela Morales	Most likely	\$700	something@email.com	Construction Manager		\$500	3 months ago
Martha Monroe	Highly likely	\$7,000	something@email.com	Project Manager	Monroe household	\$600	28 days ago
Leah Astreda	Highly likely	\$2,400	something@email.com	Artist	Astreda household	\$1,200	1 month ago
Lucian LaChance	Highly likely	\$1,400	something@email.com	Police Captain		\$2,000	14 days ago
Karin Bar	Highly likely	\$1,200	something@email.com	Program Manager		\$3,000	14 days ago
Chlan Dupree	Highly likely	\$200	something@email.com	Technical Writer		\$200	1 year ago
Kyral McKinney	Highly likely	\$9,000	something@email.com	Author		\$2,000	32 days ago
Cassandra Dun	Most likely	\$1,000	something@email.com	Business Owner	Dun household	\$500	1 year ago
Laurenne Gilberstein	Highly likely	\$5,400	something@email.com	Human Resources		\$1,000	14 days ago
Ray Tanaka	Most likely	\$1,600	something@email.com	Integration Specialist	Tanaka household	\$600	5 months ago
Bruno Zhao	Highly likely	\$1,300	something@email.com	Art Director		\$900	2 months ago
Will Little	Highly likely	\$2,000	something@email.com	Real Estate Broker		\$50	28 days ago
Andie Lawson	Highly likely	\$800	something@email.com	Career		\$900	32 days ago

This screenshot shows the same list of donors, but with a dialog box open for adding contacts to a marketing segment. The dialog box has options for 'Add to existing' and 'Create new', and a dropdown menu for selecting the segment, currently showing 'Summer 2023 solicitation'. The list columns are the same as in the previous screenshots.

Full name	Likelihood	Estimated amount	Email	Job title	Household	Last donation	Last engagement
Daren Moulton	Most likely	\$4,000	something@email.com	Security Researcher	Moulton household	\$1,400	14 days ago
Kayo Misa	Highly likely	\$1,500	something@email.com	Senior Designer		\$600	5 months ago
Aadi Kopper	Highly likely	\$10,000	something@email.com	Landscaper Architect	Kopper household	\$9,000	5 months ago
Aaron Bunton	Most likely	\$500	something@email.com			\$100	3 months ago
Gabriela Morales	Most likely	\$700	something@email.com			\$500	14 days ago
Martha Monroe	Highly likely	\$7,000	something@email.com	Project Manager	Monroe household	\$600	28 days ago
Leah Astreda	Highly likely	\$2,400	something@email.com	Artist	Astreda household	\$1,200	3 months ago
Lucian LaChance	Highly likely	\$1,400	something@email.com	Police Captain		\$2,000	14 days ago
Karin Bar	Highly likely	\$1,200	something@email.com	Program Manager		\$3,000	14 days ago
Chlan Dupree	Highly likely	\$200	something@email.com	Technical Writer		\$200	1 year ago
Kyral McKinney	Highly likely	\$9,000	something@email.com	Author		\$2,000	32 days ago
Cassandra Dun	Most likely	\$1,000	something@email.com	Business Owner	Dun household	\$500	1 year ago
Laurenne Gilberstein	Highly likely	\$5,400	something@email.com	Human Resources		\$1,000	14 days ago
Ray Tanaka	Most likely	\$1,600	something@email.com	Integration Specialist	Tanaka household	\$600	5 months ago
Bruno Zhao	Highly likely	\$1,300	something@email.com	Art Director		\$900	2 months ago
Will Little	Highly likely	\$2,000	something@email.com	Real Estate Broker		\$50	28 days ago
Andie Lawson	Highly likely	\$800	something@email.com	Career		\$900	32 days ago



# Fundraising Performance Dashboard

Extend the analytic capabilities of Fundraising and Engagement

## Overview

View key fundraising performance

### Features:

- Connect Fundraising and Engagement data model
- View KPI trackers and updated metrics
- Analyze fundraising overview reports

# Volunteer Management

More efficiently manage day to day processes to recruit, onboard, and retain larger pools of volunteers.

## Includes

- Engagement opportunity management
- Volunteer profile and history
- Qualifications and requirements
- Volunteer application and attendance tracking
- Scheduling
- Messaging and communication
- Task and activity tracking
- Dashboards
- Groups

## Product Requirements:

- Power Apps

Volunteer Management

Power Apps

Nonprofit Common Data Model

The screenshot displays the Power Apps interface for Volunteer Management. The top navigation bar includes 'Power Apps' and 'Volunteer Management'. The main content area is titled 'Daily Dashboard' and contains three data tables:

- Published Engagements:** A table with columns for Engagement Opportunity Title, Short Description, Starting Date, Number, and Minimum. It lists various activities like 'Invasive Species Removal', 'Garden Sprouts Summer Camp', and 'Fairfield - Healthy Student Market'.
- Volunteer Participation in Review:** A table with columns for Contact, Engagement Opportunity, Starting Date, Participation Status, and Created On. It shows individual volunteer records such as 'Jacob Hancock' and 'Jordan Mitchell' participating in different events.
- Engagements in Draft:** A table with columns for Engagement Opportunity Title, Short Description, and Engagement Opportunity Status. It lists draft entries like 'Advocacy: Food Insecurity' and 'Invasive Plant Removal'.



# Volunteer Engagement

Engage and retain more volunteers by making it easier for volunteers to find and apply for engagement opportunities that match their skills, interests, and schedules.

## Product Requirements:

- Volunteer Management
- Power Portal



## Includes

- Engagement opportunity search
- Volunteer profile
- Scheduling
- Engagement summary
- Secure authentication

Power Apps interface showing a list of applications. The 'Volunteer Engagement' app is highlighted.

Name	Modified	Owner	Type
Volunteer Engagement	21 h ago	Kelsey Byrd	Portal
Marketing	1 d ago	Kelsey Byrd	Model-driven
Omnichannel Administration	1 d ago	SYSTEM	Model-driven
Omnichannel admin center	1 d ago	SYSTEM	Model-driven
Customer Service Hub	1 wk ago	SYSTEM	Model-driven

# Volunteer center

Save volunteer managers time and improve the onboarding process for volunteers by providing a central hub of key information.

## SharePoint template includes

- Quick links for volunteers to access key sites and resources both within and outside SharePoint
- Access to training and onboarding materials
- Newsfeed for surfacing announcements, event updates, and other important information
- Yammer connector for building volunteer community
- About us pages for volunteers to learn about nonprofit and volunteer staff

### Product Requirements:

- SharePoint

Volunteer center template

SharePoint

Nonprofit volunteer center

Home Mission & Impact New volunteers Training Files & Forms Edit

Confidential \ Internal only Following Share

+ New Page details Analytics

Published 8/26/2021 Edit

Local weather

Redmond, WA

62°F Cloudy 77°/56° 08/25/2021 MSN Wea...

National volunteer week

127 days 21 hrs 04 min 20 sec

This year's goal is 1 million volunteer hours!

Learn more

Upcoming events See all

★ Volunteer week registration

📄 Program directory

🧰 Volunteer toolkit

❤️ Donation portal

# Manage volunteers

Increase productivity and collaboration for staff that work with volunteers by streamlining volunteer management activities.

## Product Requirements:

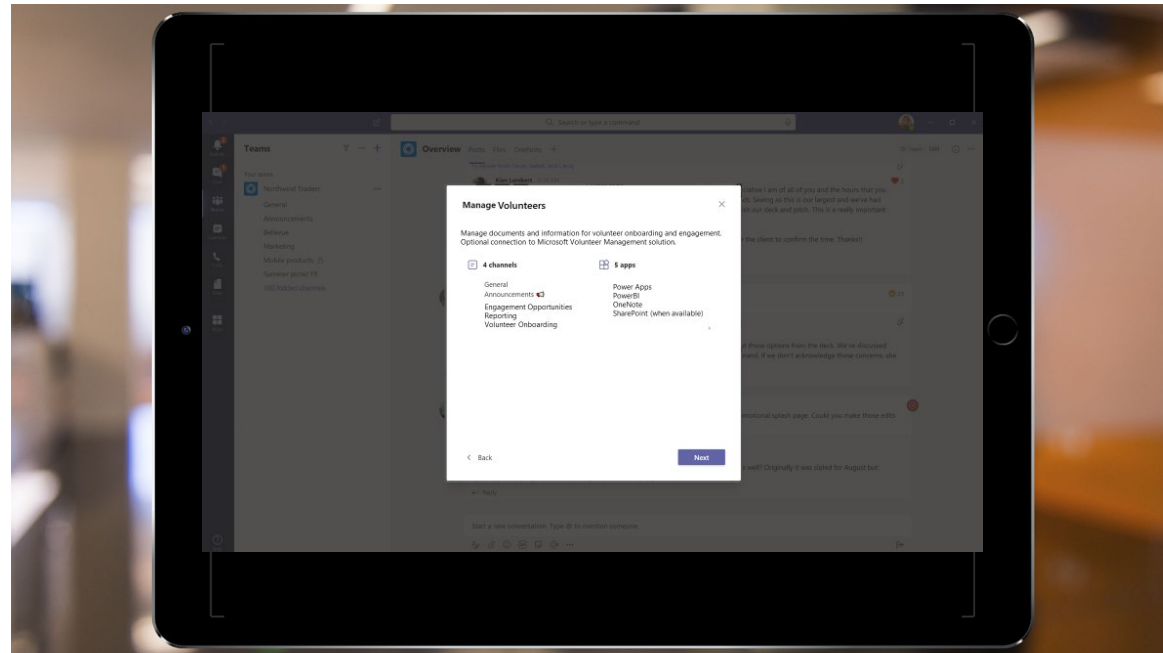
- Teams

Manage volunteers template

Azure

## Teams template includes:

- Settings
- Channels
- Pre-installed apps



# Community Training

Deliver personalized training and education at scale to volunteers, staff, and program participants.

## Includes

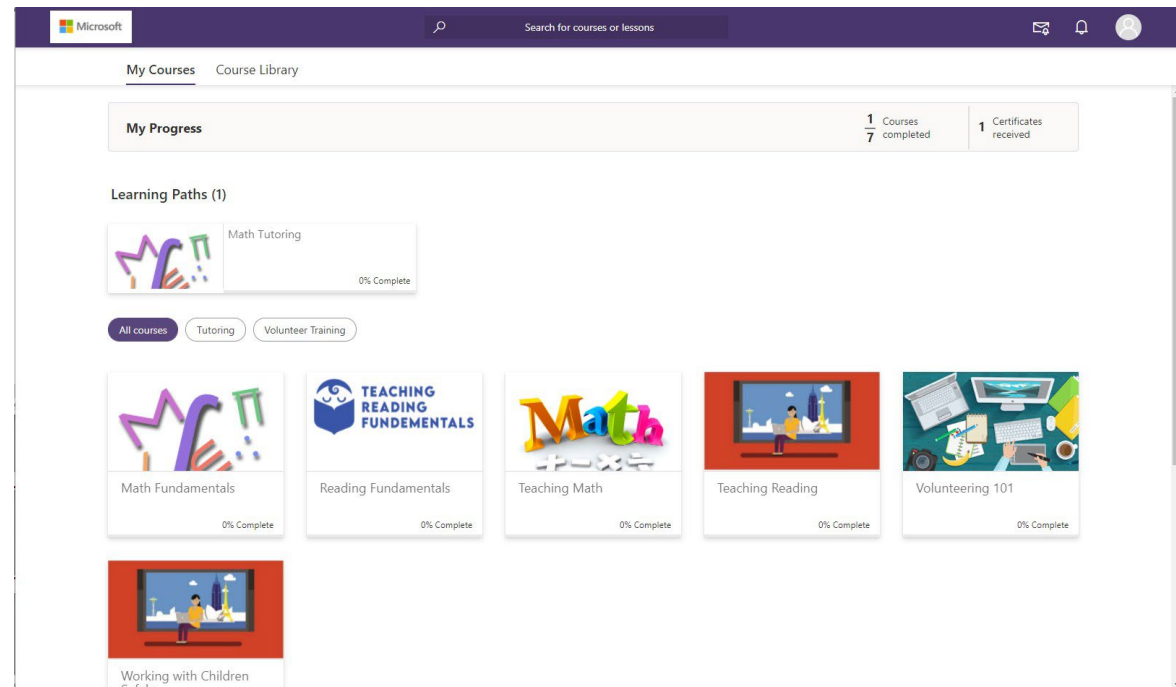
- Online, low-bandwidth, and offline learning
- User management and monitoring tools
- Reports and instrumentation, both out-of-the-box and custom, to track progress and measure outcomes
- Custom interface that can be personalized with nonprofit content, logo, and branding

### Product Requirements:

- Azure

Microsoft Community Training

Azure

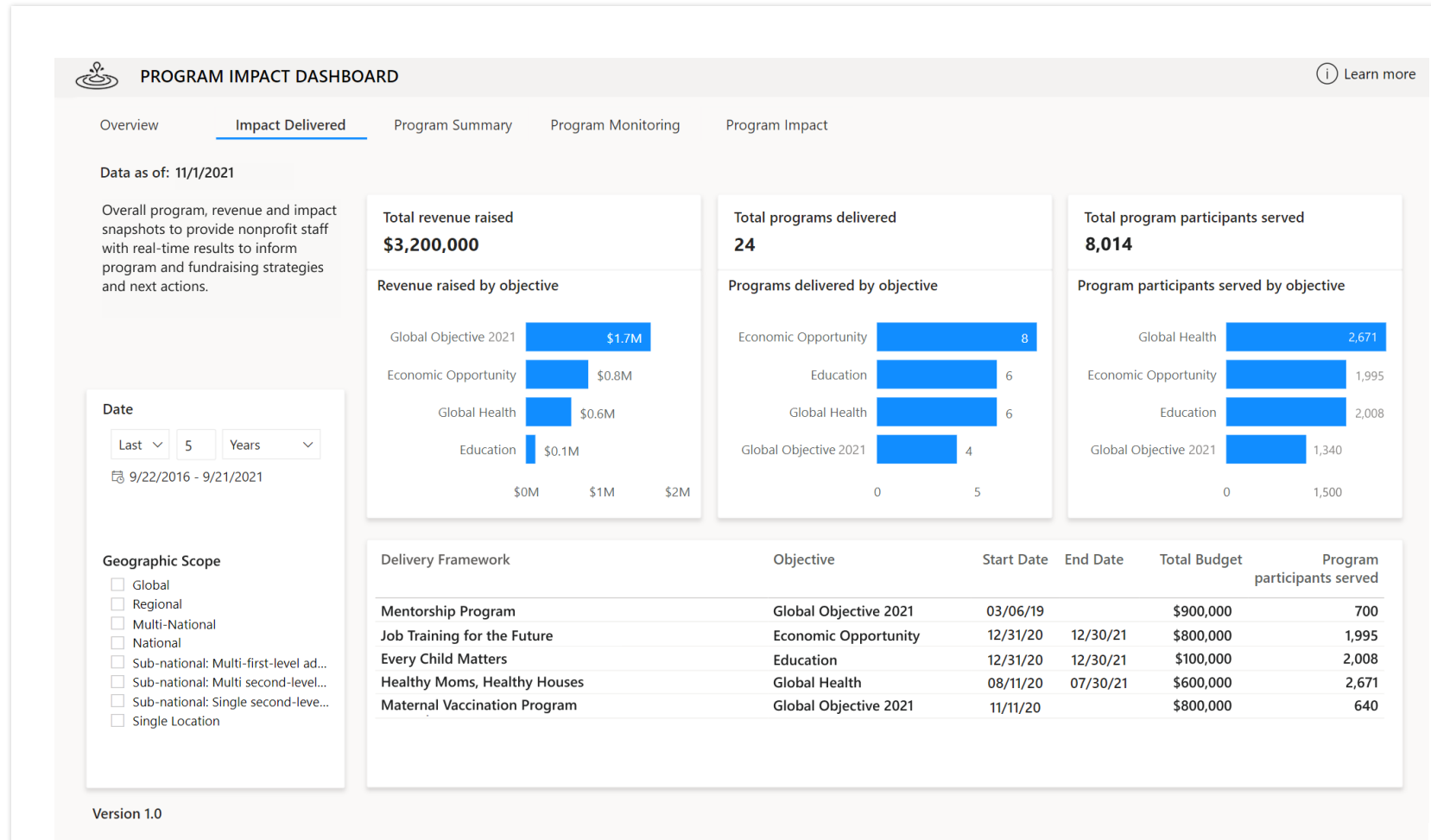


# Program impact dashboard

Understand the impact of funds raised, programs delivered, and outcomes achieved.

## Use the dashboard to

- Streamline the preparation of external reports
- Compare metrics across all programs
- Track performance over time
- Track progress to key program objectives and results
- Break down silos between fundraising and program priorities



# Microsoft Sales Copilot for Teams Premium and Dynamics 365

Empower fundraisers and increase productivity with AI

## Overview

Reduce admin task time with AI

### Features:

- AI-generated email replies
- AI-generated notes and sentiment analysis (Teams)
- AI-generated real-time insights
- Connected CRM data and capabilities

### Helps reduce:

- Data entry
- Time developing content/messaging
- Communication churn

