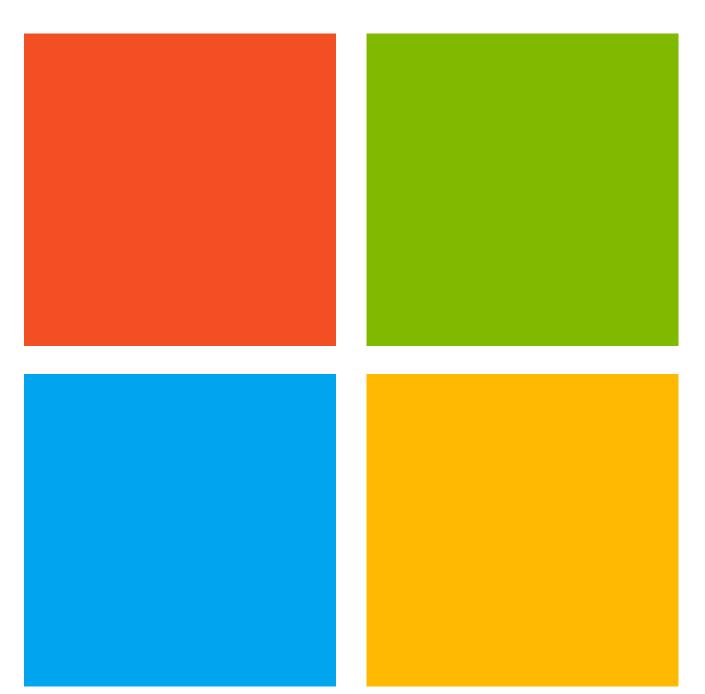


### Microsoft Cloud for Nonprofit



### Microsoft mission

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



### **Topics covered**







### Microsoft Industry Cloud Vision

### **Microsoft Cloud for Nonprofit**

- Solutions and Customers
- Microsoft partners investing with us
- Getting started

### Nonprofit challenges & technology opportunities



### Microsoft Industry cloud principles





### **Cross cloud industry innovation**

### **Integrated experience**

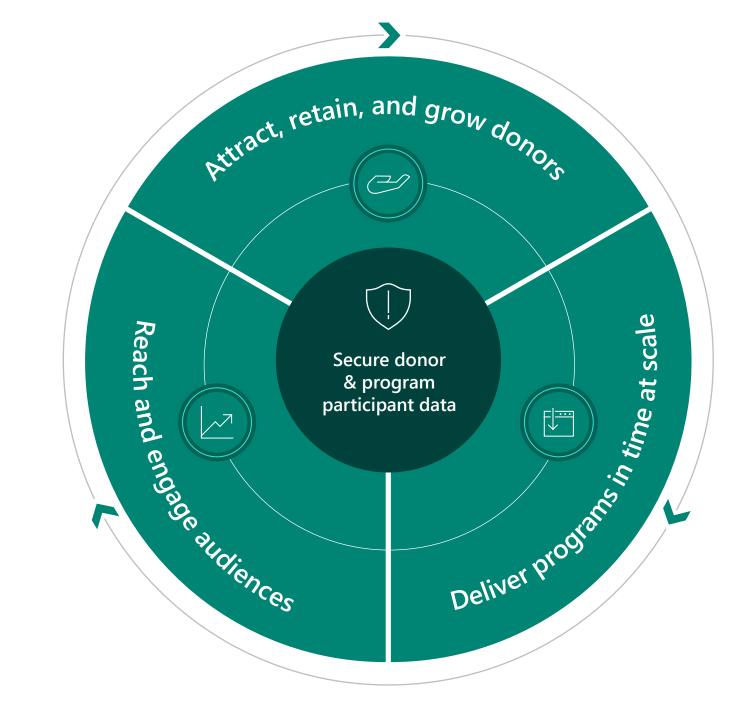
### Meet customers where they are

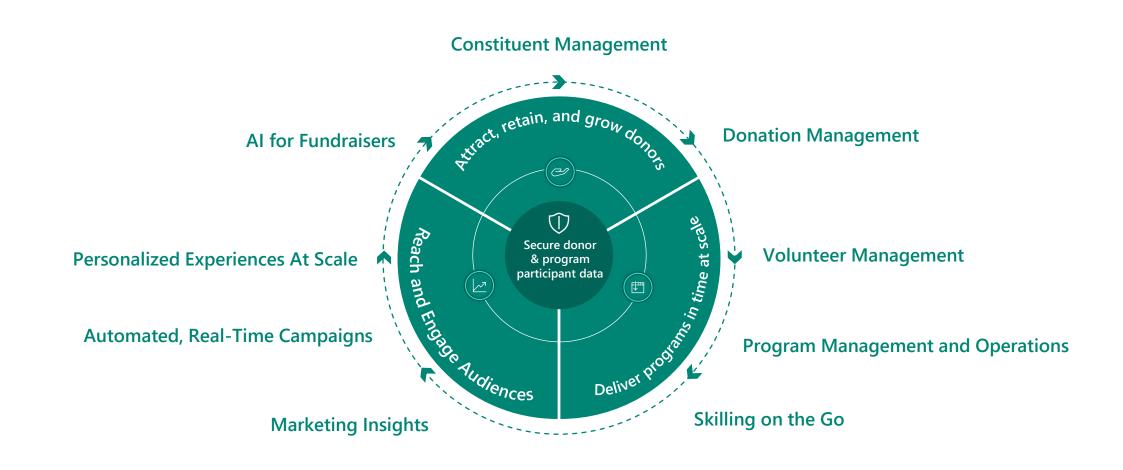
### Advance customer success



### Microsoft Cloud for Nonprofit overview video

Microsoft Cloud for Nonprofit vision



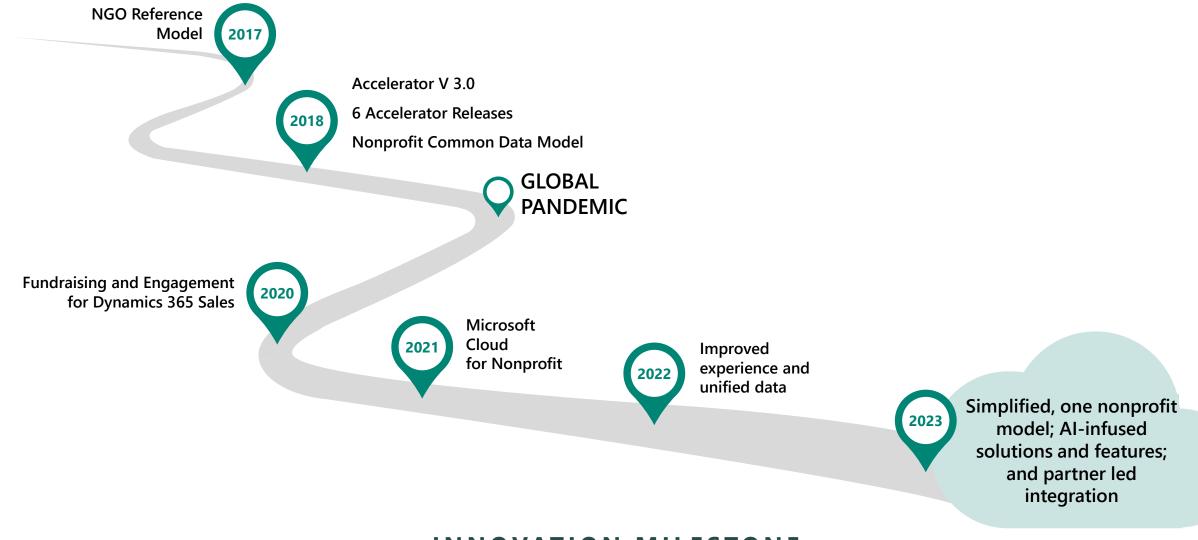


#### Secure donor & beneficiary data



### **Microsoft Cloud for Nonprofit Journey**

For far too long, the promise of what technology could deliver to nonprofit organizations did not meet the reality.

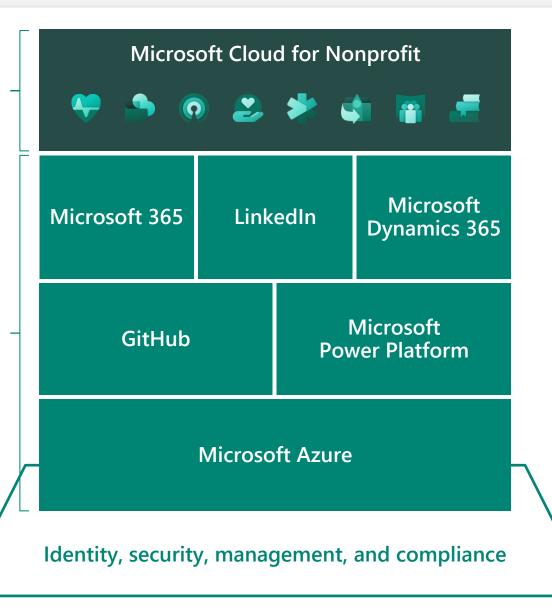


#### **INNOVATION MILESTONE**

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

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

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



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

### **Microsoft Cloud for Nonprofit solutions**

Attract, Retain, and Grow Donors			Reach and Engage Audiences			Deliver Programs In Time At Scale					
Fundraising and Engagement	Fundraising performance dashboard	Viva Sales	Constituent marketing journeys	Dynamics 365 Marketing	Dynamics 365 Customer Insights	Volunteer Managemen t	Volunteer Engagement	Volunteer center	Manage volunteers	Microsoft Community Training	Program impact dashboard
Dynamics 365	4	•			9			s	цį	A	4
Sales Azure App Services	PowerBl Pro	Viva	Dynamics 365 Marketing	Dynamics 365 Marketing	Dynamics 365 Customer Insights	Power Apps	Power Pages	SharePoint	Teams	Azure	PowerBl Pro
Dynamics 365	PowerBl	Modern Work	Dynamics 365		Power	<sup>•</sup> Apps	ps Modern Work		Azure	PowerBl	
	Nonprofit Common Data Model										

### 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 Enable co

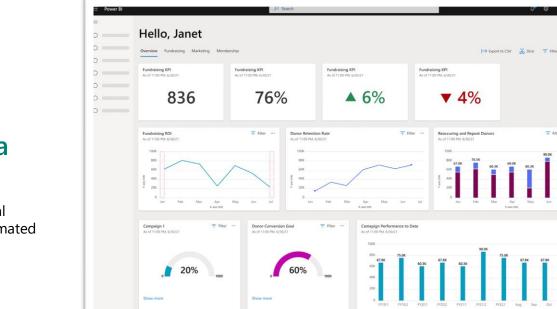
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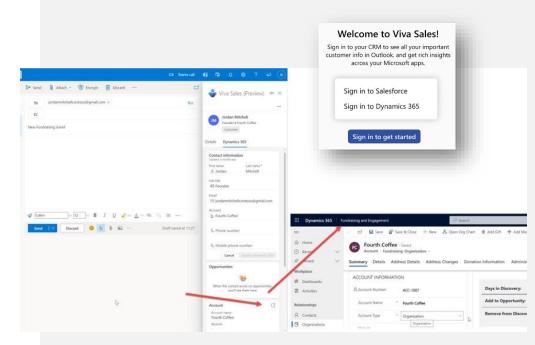
#### Skilling on the go

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

#### Partner Implementation & Deployment Services

Accelerate time to value with partner lead 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.







## Attract, retain, and grow donors



Attract, retain, and grow your donor base with connected data, built-in donor engagement communications, holistic constituent profiles, and seamless reconciliation and reporting.





### **Constituent Management**

Attract, retain, and grow donor and supporter bases

### **AI for Fundraisers**

Empower fundraisers and increase productivity

### Donation & Award Management

Payment processing, fund accounting, and designation management

### **Fundraising and Engagement**

Modernize donor and constituent engagement to increase mission impact

#### **Overview:**

- Get a holistic view of donors with unified data across fundraising, marketing, and programming.
- Automate donation, opportunity, campaign, and event management
- Manage donations and transactions with seamless financial reconciliation and reporting
- Unlock the power of your organization's collective network to make impactful connections with LinkedIn Sales Navigator



### **Fundraising Performance Dashboard**

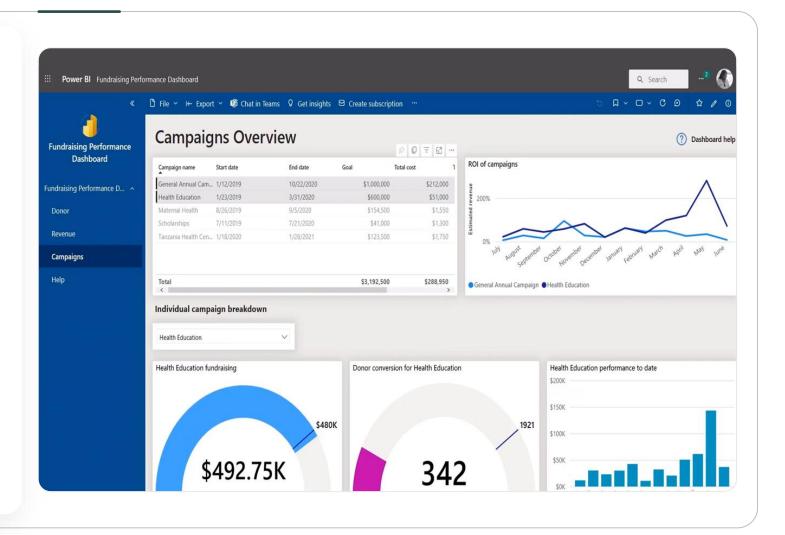
Extend the analytic capabilities of Fundraising and Engagement

#### Over<u>view</u>

### View key fundraising performance

#### Features:

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



### Viva Sales Copilot

Empower fundraisers and increase productivity with AI

#### **Overview**



Reduce admin task time with AI

### Features:

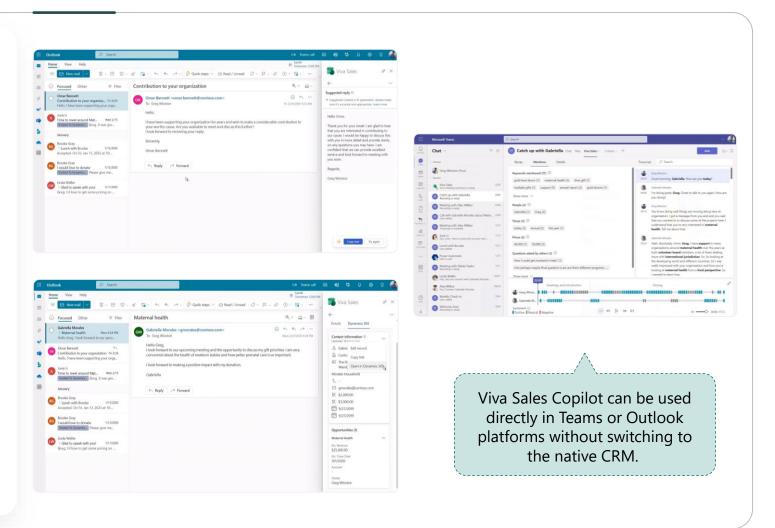
- Al-generated email replies
- Al-generated notes and sentiment analysis (requires Teams Premium)
- Al-generated real-time insights
- Connected CRM data and capabilities

### Helps reduce:

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

#### Product:

- Free with Dynamic 365 Sales Enterprise
- Guidance for non-Dynamic customer



#### **Microsoft Cloud For Nonprofit**

### Partner Implementation & Deployment Program Overview

#### **Value Proposition**

### This program aims to streamline nonprofit implementation and data migration activities through:

- 1. Regional and functional-based *certified* partners implementation and deployment
- 2. Standardized cost, implementation schedule, and defined activities
- 3. Simplified decision-tree based on organizational needs
- 4. Training and support provided through partners and Microsoft

FROM

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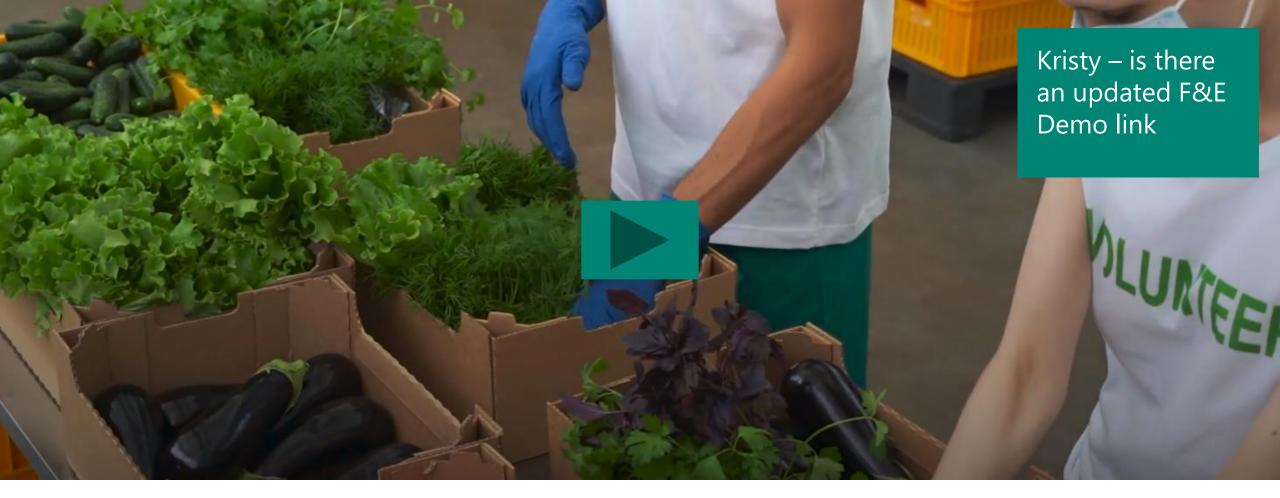
#### What is the program and what does it provide?

This is a partner-led Fundraising and Engagement and Dynamic 365 Marketing deployment, alongside data migration services to mitigated common Microsoft Cloud for Nonprofit implementation roadblocks:

- 1. Discovery & Design gap analysis and requirements
- 2. F&E Implementation Environment configuration and functionality
- 3. D365 Marketing Implementation Configuration
- 4. Data Migration Workshops & CRM Data Migration Assessment
- 5. Training & Support

#### Who are programmatic partners?





### **Fundraising and Engagement Demonstration**



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With operations alone, we'll realize a cost savings between \$50,000 and \$100,000. That doesn't even include the elimination of server hosting, much less how we'll engage with donors far more professionally and efficiently. How do you put a price tag on your fundraising work becoming laser-focused?

Dawie Hyman, IT Executive, United Way of Greater Los Angeles

#### United Way GREATER LOS ANGELES

#### Read the story



### Deliver programs in time at scale



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





#### **Program Management & Operations**

Design, deliver, and measure programs that maximize mission delivery



#### **Volunteer Management**

Enable volunteer coordinators and volunteers to collaborate and match skills with needs



### Skilling on the Go

Meet critical program delivery and volunteer training needs with mobile-optimized training platform



### Volunteer Management and Volunteer Engagement Demonstration

### Volunteer Management

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

### Volunteer managers can:

- Create and manage volunteer opportunities
- Simplify the volunteer qualification process and steps to match a person with the right engagement opportunity
- Streamline the volunteer onboarding process
- Manage scheduling with ease
- Enable two-way communication with volunteers

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Pinned V	Published Engagements $\!$		+	New 🗎 Delete	~ :	Volunteer Participation i	n Review 🗸		+ New 🗎 De	elete $  \lor $ :
orkplace				Search this view	م				Search this	view D
Dashboards	✓ Engagement Opportunity Title $∨$	Short Description $\checkmark$	Starting Date 1	$\sim$   Number $\sim$   Minimu	m ~	$\checkmark$ Contact $\lor$	Engagement Opportunity $\vee$	Starting Date (En $\vee$	Participation Status $\vee$	Created On ↑
Activities	Invasive Species Removal	lvy removal and native pla	6/16/2021	8	20	Jacob Hancock	Fairfield - Healthy Student Market	8/3/2021	In Review	6/4/2021 6:1-
gagement Opportunities	Garden Sprouts Summer Camp	Summer camp for children	7/19/2021		10	Jordan Mitchell	Hawthorne Garden Day	8/6/2021	Needs Review	7/1/2021 6:1
Engagements	Fairfield - Healthy Student Market	t Provide nutritious food to	8/3/2021	4	25	Jordan Mitchell	Fairfield - Healthy Student Market	8/3/2021	Needs Review	7/28/2021 7:
Shift Schedule	Invasive Plant Removal	We need your help with th	8/7/2021	(222)	5	Jordan Mitchell	Invasive Plant Removal	9/11/2021	Needs Review	8/20/2021 4:
unteers	Communication and Social Media	Long description of this ev	8/14/2021	1	10	Maria Oliva	Invasive Plant Removal	9/11/2021	In Review	8/23/2021 3:
Volunteers	Rain Water Collector Set-Up	Help us set up a brand-ne	10/1/2021	0		Omar Bennett	Invasive Plant Removal	9/11/2021	Needs Review	8/23/2021 3:
Groups						Ashley Schroeder.	Invasive Plant Removal	9/11/2021	In Review	8/23/2021 3:
Applicant Review						Jordan Mitchell	Rain Water Collector Set-Up	10/1/2021	Needs Review	8/26/2021 3:
						<abc -="" 1="" 8="" 8<="" of="" th=""><th></th><th></th><th></th><th>,</th></abc>				,
						Engagements in Draft 🗸	<u> </u>		+ New 🗎 De	elete   $\vee$ :
									Search this	view ${\cal P}$
						✓ Engagement Opport	unity Title ↑ ✓ Short Descr	iption 🗸	Engagement Opportuni	ty Status 🗸
						Advocacy: Food In	nsecurity This advo	cacy campaign wor	Draft	
						Invasive Plant Ren	noval Ivy remov	al and native speci	Draft	

### **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

	Contoso Environmental Fund	Volunteer Engagement	Sign	In
		Upcoming Engagement Opportunities Search for Keywords		
۵	Filters  Virtual Only  Zip/PostalCode  Enter Location  Dates  All Dates  Veferences  All Preferences	1-10 of 141 upcoming engagements found  Saturday, March 13, 2021 - Multiple Shifts Invasive Plant Removal		0
	Qualifications V All Qualifications V Apply X Clear All	Ongoing?           Community Gardens           ① On tocation - Burien, WA           Every first Saturday of the month, from 10 AM to approximately noon or 1 PM, volunteers are welcome to join as we garden together and transform the common areas of the garden's many amenities.           Community         Gardening	5 Volunteers still needed View Details	
		May 5 - August 30, 2021           Communications and Social Media Intern           (2) Virtual           The Communications and Social Media Intern is responsible for developing and implementing new and implementing new and implemented to a billion. Modifie will avail available MVDMs	1 Volunteers still needed View Details	

### Volunteers can:

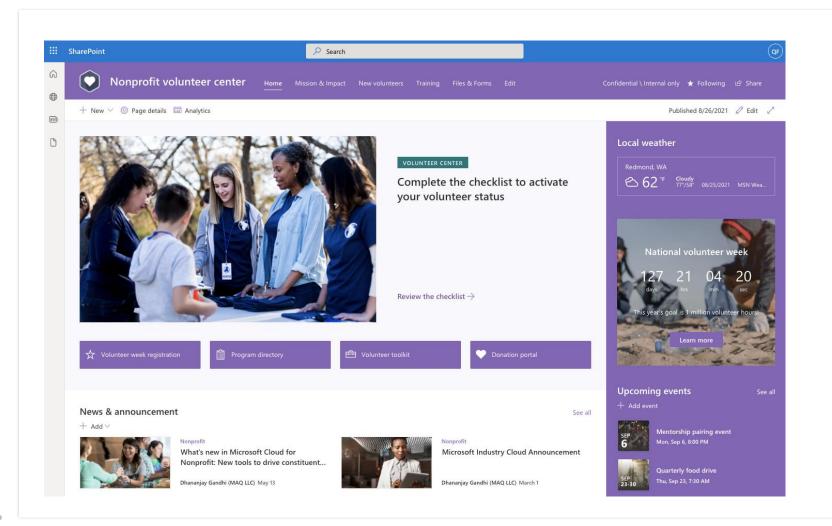
- Search and sign up for volunteer opportunities that suit their experience and priorities
- Create and update a volunteer profile to highlight their skills and interest areas
- See a summary of volunteer engagements and hours

### Volunteer center

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

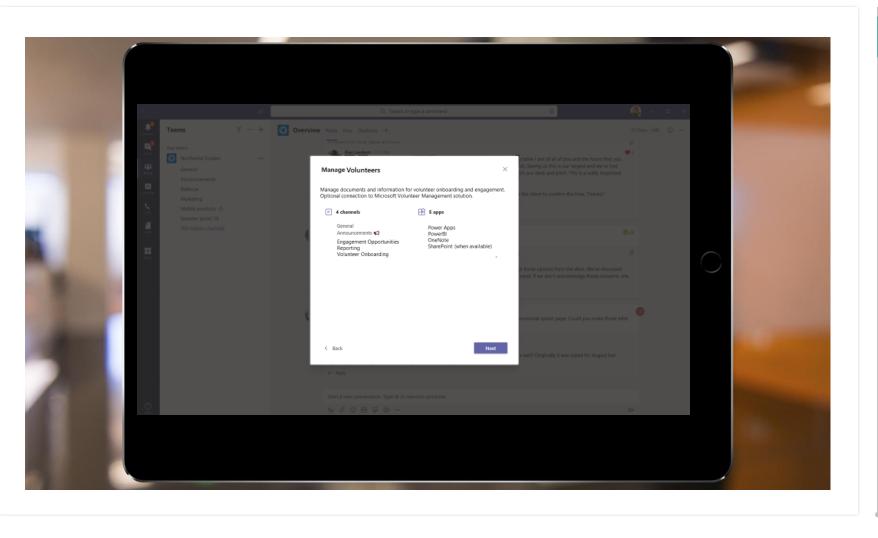
#### Volunteers can:

- Access key information and documents, including training and onboarding materials
- Learn more about the organization and its staff
- Stay up to date on the nonprofit's latest news and upcoming events



### Manage volunteers

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



#### Program teams can:

- Share volunteer and engagement opportunity information with co-workers
- Organize and share onboarding and frequently used documents
- Make important team and event announcements

## **Community Training**

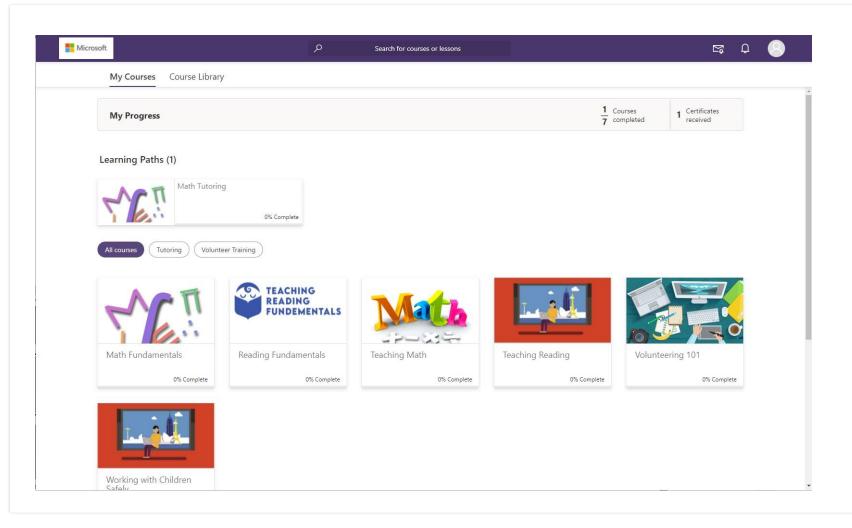
Deliver personalized training and education at scale to volunteers, staff, and program participants

### Volunteer managers can:

- Deliver personalized training at scale to volunteers, program participants, and other constituents
- Manage courses, users, and analytics in one place via the management portal
- Track learning process and measure outcomes with reports and dashboards

#### Volunteers can:

- Access training anytime, from their choice of device
- Take courses using low-bandwidth networks and even offline

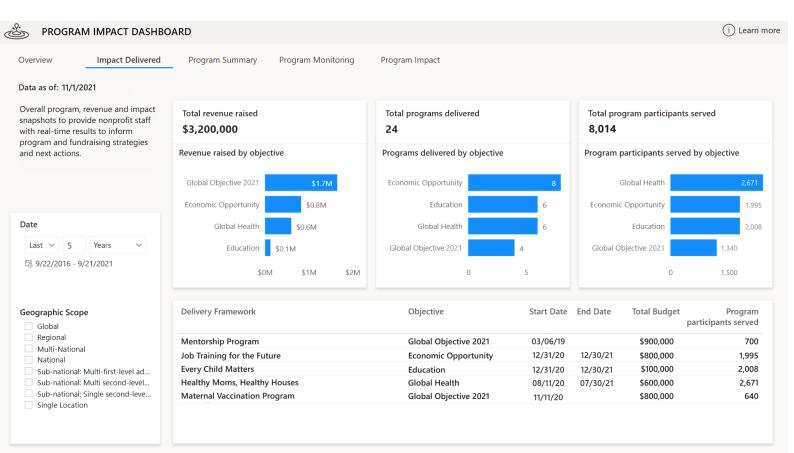


### **Program impact dashboard**

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

### Nonprofit staff can:

- 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



Version 1.0



66

The Microsoft platform democratizes access to skills development, making it possible to reach thousands. Dawie

Ramotse Phalatse, Head of Design Strategy, Nedbank

### Read the story





### Reach and engage your audiences



Personalize interactions at scale with real-time, automated campaigns that reach donors, volunteers, and all your audiences across channels







### Personalized Experience at Scale

Strengthen relationships by engaging with constituents as individuals

### Automated, Real-time Campaigns

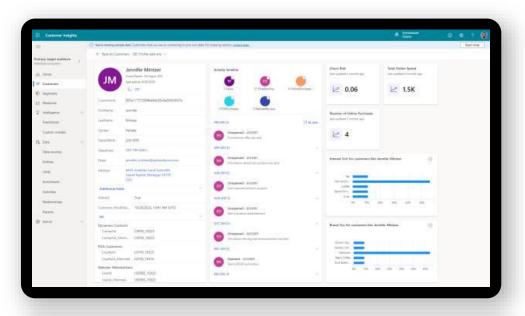
Build loyalty by delivering content through the right channel at the right time

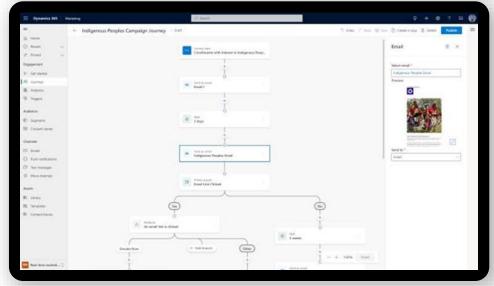
### **Comprehensive Marketing Insights**

Make data-informed decisions with analytics and Al

# Dynamic 365 Marketing & Customer Insights

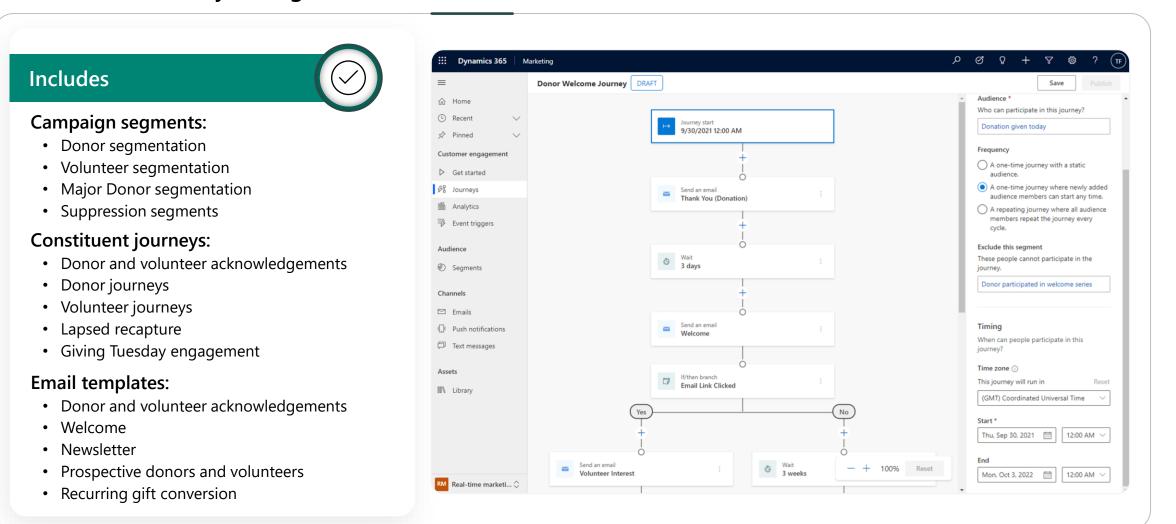
- Better understand supporters with a comprehensive view of constituents, including preferences, household information, and organizational affiliations
- Increase donor loyalty and lifetime giving by understanding and addressing funder priorities and their journey
- Help fundraisers tailor cultivation with views of individual donor segments, associated campaigns, and customer journeys for each segment





### Constituent marketing journeys (on D365 Marketing)

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







Customer The Salvation Army Switzerland

Partner

<u>iSolutions</u>

Industry Nonprofit

Size

50 – 999 employees

**Country** Switzerland

#### Products and services

Dynamics 365 Customer Insights

#### Read full story here





"Without data, we would be blind when making decisions on where to open new stores. This solution provides new insight on our customer base and helps us reach them."

-Mathias Haller, CIO and Head of IT, The Salvation Army Switzerland

#### Situation

Salvation Army stores empower people with barriers to employment, and revenue from the stores helps meet basic human needs and community services. The Salvation Army Switzerland needed a way to better understand and connect with people who donate goods and buy from their thrift stores.

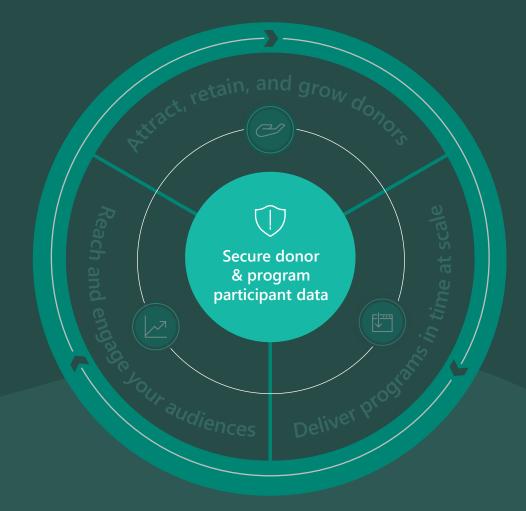
#### Solution

The nonprofit worked with iSolutions, a Microsoft partner, to build an easy-to-use loyalty app on Power Platform's Power Apps. The Salvation Army already used Microsoft Dynamics CRM so they connected the app to Dynamics to store customer information, Power BI to generate reports, and Azure to run the interfaces in the cloud.

#### Impact

The Salvation Army Switzerland uses insights from their app to inform where to open new stores, provide relevant information to customers and donors, better manage its secondhand shops, and strengthen relationships with patrons. After just one year, more than 65,000 people have signed up, far exceeding the goal of 40,000 in four years.

# Secure donor and program participant data



Protect sensitive data and build trust with supporters, program participants, and employees using integrated, best-inclass security tools.





Protect your nonprofit across all clouds and all platforms



Prevent, detect, and respond to attacks with a unified best of breed solution



Find and resolve critical threats faster

### **Security Program for Nonprofits**

E S

AccountGuard for Nonprofits

#### Security Assessment

- 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

- 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)
- <u>Be safer over wireless connections</u> (microsoft.com)
- Intro to cybersecurity
- For IT administrators
  - Microsoft 365 Administrator's Security Toolkit
  - Security collection on MS Learn
  - <u>Security Skilling Hub</u>
  - Security Virtual Training Days

### Support, training, and licensing

### **Nonprofit Offers**



#### Microsoft Cloud for Nonprofit Basic Plan – Free\*\*\*



#### Microsoft Cloud for Nonprofit Standard Plan – \$750 or \$2000 per month\*\*\*

	Modern Workplace <sup>1</sup>	<b>Business Applications and Power Platform</b>	Azure	
Small to mid-sized nonprofits (0-300 seats)	<ul> <li>Microsoft 365 Business Premium – Grant up to 10 seats, 11+ seats: \$5.00/u/m</li> <li>Microsoft 365 Business Basic – Grant up to 300 seats</li> <li>Surface – Up to 10% off new devices*</li> <li>Windows 11 Professional Grant up to 50 seats; 51+ seats: 75% off</li> </ul>	<ul> <li>Power Bl Pro – \$3/u/m</li> <li>Power Apps (Power Apps Per App) Grant up to 10 seats; 11+ seats: \$2.50/app/u/m</li> <li>Dynamics 365 Sales Enterprise<sup>1</sup> Grant up to 5 seats; 6+ Seats: \$23.80/u/m</li> <li>Dynamics 365 Marketing – \$375/tenant/month Additional contacts/profiles available at nonprofit</li> </ul>	<ul> <li>Cloud Services – \$3,500 annual grant in Azure Services; includes Onboarding Concierge</li> </ul>	
Large nonprofits (300+ seats)	<ul> <li>Microsoft 365 E3 – \$9/u/m**</li> <li>Microsoft 365 E5 – \$22.80/u/m**</li> <li>Surface – Up to 10% off new devices*</li> </ul>	discount		

Microsoft nonprofit offers are not available in all countries/regions. Refer to microsoft.com/nonprofit for additional terms and offer details.

<sup>1</sup>Grant availability will vary by channel.

\*Devices sold through the Microsoft Store are at a 10% discount. For devices sold through partners, discount may vary.

\*\*For each purchase Microsoft 365 E3 and/or E5 user, nonprofits can receive 10 additional Office 365 F3 seats for volunteers. Offer through Enterprise Agreement only at this time.

\*\*\* Prerequisite licenses required for Basic and Standard Plans. Standard Plan 1 is for 1-250 employees for \$750/month/tenant. Standard Plan 2 is for over 250 employees, for \$2,000/month/tenant.

### Packaging and pricing | How it works

#### **5 Step Process**



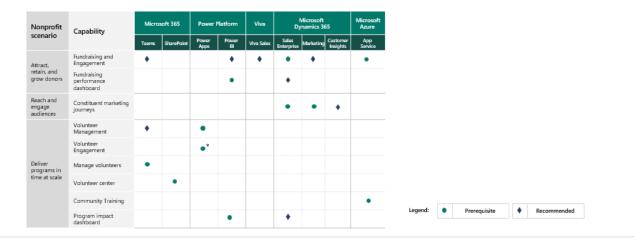
Confirm Nonprofit Eligibility\*

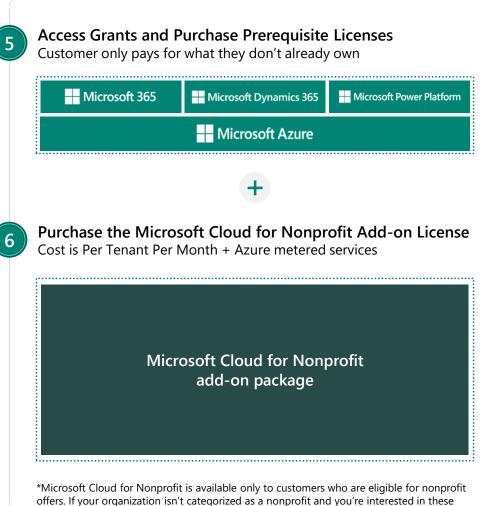
Review Microsoft Cloud for Nonprofit Industry Solution Capabilities



3

**Review Microsoft Cloud for Nonprofit Industry Solution Capabilities** 





solutions, we plan to make an offer available in the coming months. \*\* <u>"Power Apps Portals login capacity add-on" and/or "Power Apps Portals page view</u> <u>capacity add-on</u>" required. Quantity dependent on volunteer volume.

### Prerequisites | Microsoft Cloud Services licensing map

Nonprofit scenario	Capability	Microsoft 365		Power Platform				Aicrosoft namics 365		Microsoft Azure
		Teams	SharePoint	Power Apps	Power Bl	Vīva Sales	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						•	•	•	
	Volunteer Management	•		•						
	Volunteer Engagement			•*						
Deliver programs in	Manage volunteers	•								
time at scale	Volunteer center		•							
	Community Training									•
	Program impact dashboard				•		•			
			Legend:	• Pi	rerequisite	Rec	commended			

\* "Power Apps Portals login capacity add-on" and/or "Power Apps Portals page view capacity add-on" required. Quantity dependent on volunteer volume.

## Training and skilling

Activate your organization's users through our comprehensive Learning paths dedicated to the Microsoft Cloud for Nonprofit

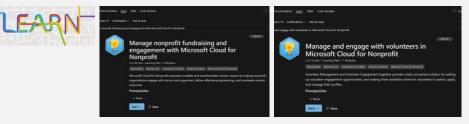
Γ	Customers Directed to					
Bas	Basic Actions	MS Learn	<b>16 Modules</b> to take users through the basic actions included in Fundraising and Engagement, and Volunteer Management, Engagement.			
	Interactive Training	Advanced Training Benefit	<b>In Depth</b> training that will go through the scenarios most common for nonprofits. Available to your entire organization through digital engagement, live webcast and access to industry and product experts.			
	Customized Training	Technology Partners	<b>Brings</b> both MS Learn and Advanced Training Benefit and adds customized learning mode to support organizational change management.			

#### Microsoft Cloud for Nonprofit Usage

#### Next Steps:

- 1. Check out MS Learn for the Basic Learn pathways, specifically designed for Microsoft Cloud for Nonprofit: <u>https://aka.ms/MicrosoftCloudforNonprofitTraining</u>
- 2. Purchased the Standard plan? Schedule a skilling session to get your customer registered with a Training Success Manager: <u>https://aka.ms/MC4Nbookings</u>
- 3. Watch our first two episodes available for view: https://aka.ms/ATBEarlyAccess

#### MS Learn Learning Paths:

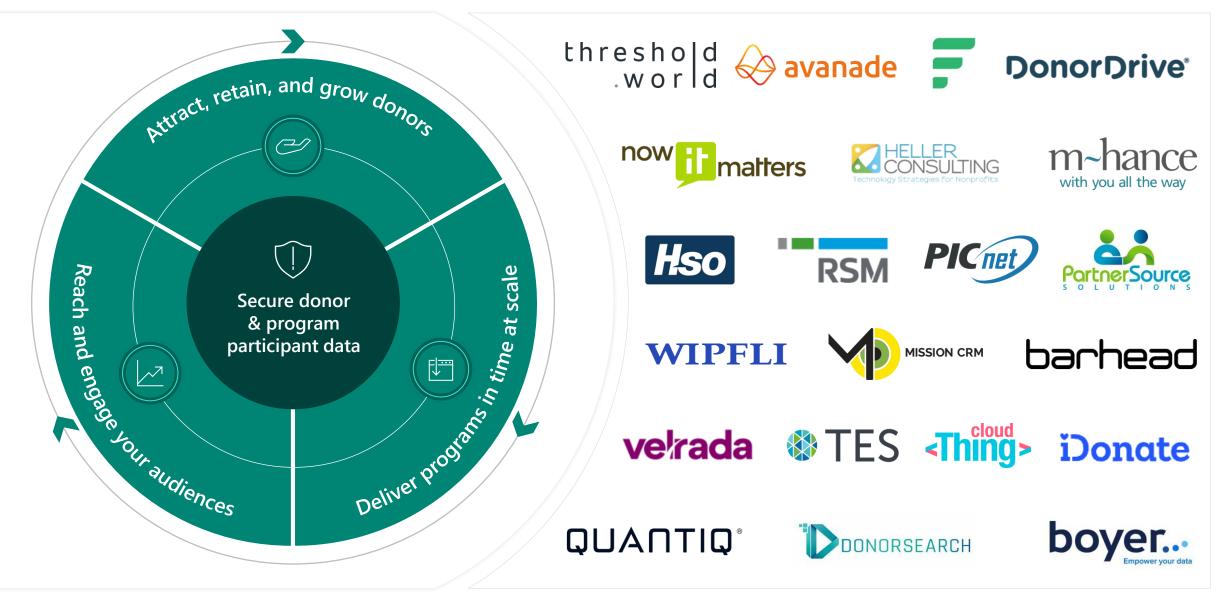


#### What:

- All Customers will have access to 2 learning with 16 modules of training via MS Learn
- Standard Customers will be entitled to Advanced Training Benefit through gated content inclusive of 6 modules and Live Q&A

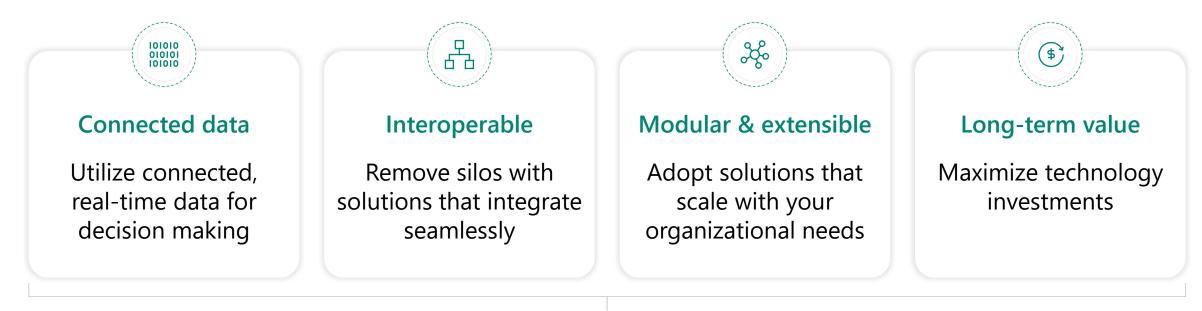
Training Release Schedule				
Training Level	Modules			
Advanced Training Benefit	Module 1: Donor and Supporter Management			
	Module 2: Payment Processing and Donation Management			
	Module 3: Nonprofit Marketing			
	Module 4: Volunteer Management (Management, SharePoint, Teams, F&E)			
	Module 5: Volunteer Engagement			
	Module 6: Volunteer HUB			

### Microsoft Cloud for Nonprofit growing ecosystem



### Microsoft Cloud for Nonprofit

One organization. One mission. One platform.





Security, compliance, and privacy

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

### **Getting started**



Learn more at Microsoft Cloud for Nonprofit



Check out Fundraising and Engagement available today

Website: Fundraising and Engagement

Guided Tour: Fundraising and Engagement Guided Tour

Demo: Fundraising and Engagement Demo



Check out Reach and Engage Audiences available today

Website: Reach and Engage Audiences

Guided Tour: Reach and Engage Audiences Guided Tour

Demo: Reach and Engage Audiences Demo



Check out Deliver Program in Time at Scale Website: <u>Deliver Programs in Time at Scale</u>

Guided Tour: Volunteer Management Guided Tour



# Thank you

ADD your LinkedIn profile

ADD your email

### Microsoft.com/nonprofits

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