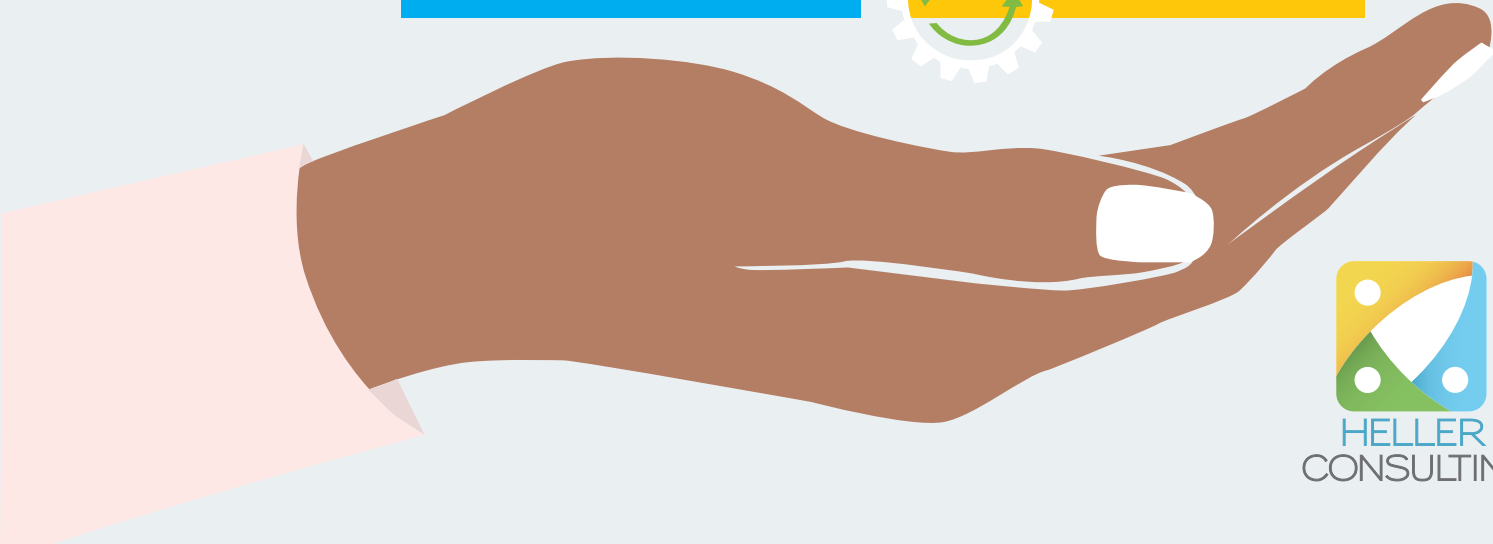
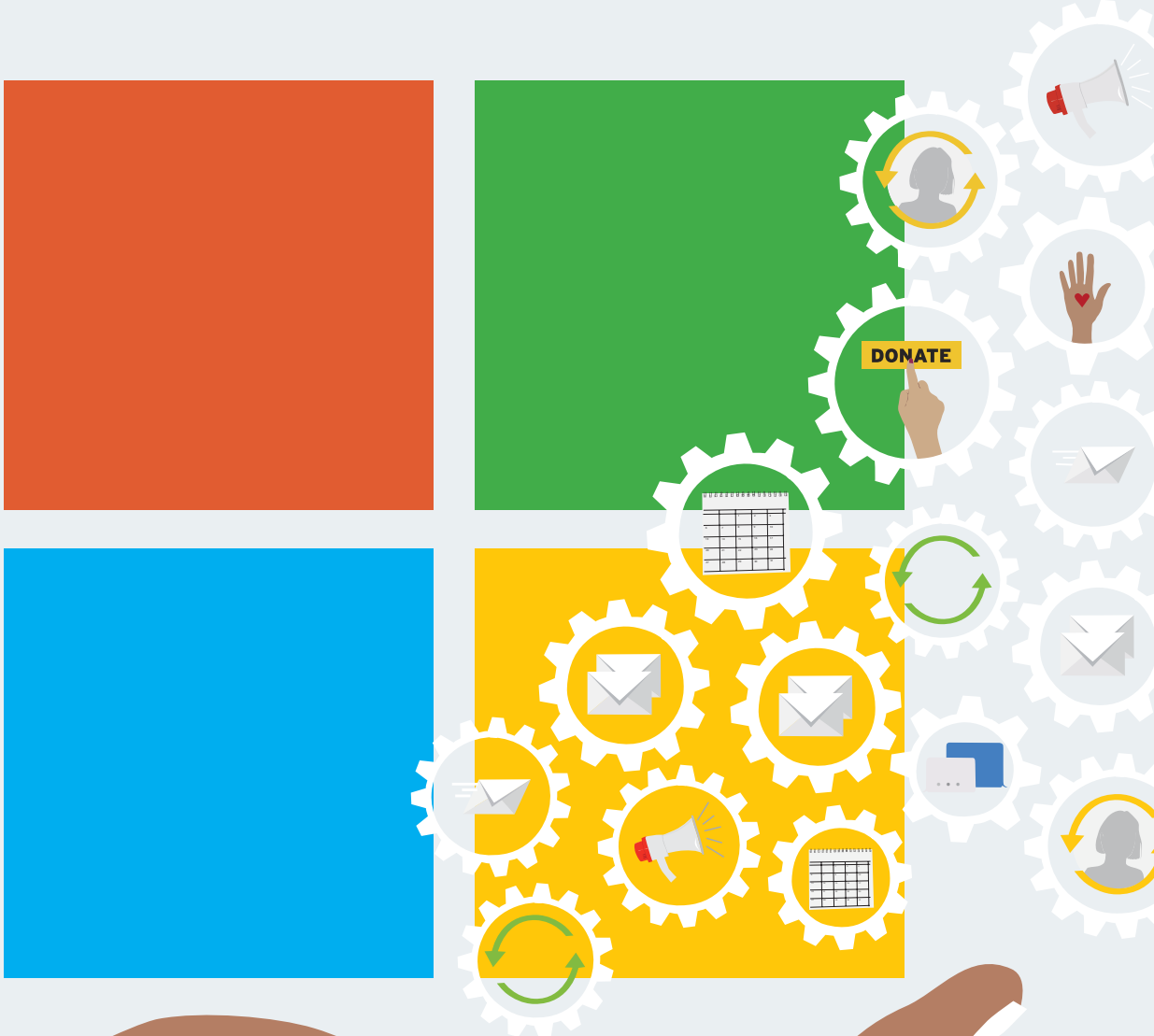


WHAT TO KNOW ABOUT MICROSOFT SOLUTIONS FOR THE NONPROFIT SECTOR



We've been watching the growing potential of Microsoft solutions for nonprofits for several years now because it represents a whole new level of technology options for nonprofits. But in case you haven't been following their story as closely as we have, here is a brief history and top things to know about Microsoft solutions for the nonprofit sector.



A brief history of Microsoft and the nonprofit sector

2015
Microsoft
Philanthropies

2017
Technology for
Social Impact

2018
Common Data Model for
Nonprofits + Nonprofit
Accelerator

2019
New Tools and
Solutions for Small
to Mid-Sized
Nonprofits

2020
Fundraising and
Engagement Solution
from Microsoft

2021
Microsoft Cloud
for Nonprofit

- **2015: Microsoft Philanthropies**

Microsoft announces expanded commitment to worldwide corporate philanthropy through the creation of this organization focused on delivering the benefits of technology to people with the greatest need.

- **2017: Technology for Social Impact (TSI)**

Microsoft forms this division of Microsoft Philanthropies that is responsible for adapting Microsoft's core commercial solutions to meet the needs of nonprofits.

- **2018: Common Data Model for Nonprofits + Nonprofit Accelerator**

Microsoft develops data definitions and an accelerator that make it easier for Microsoft and their partners to develop solutions for nonprofits that are built on the Microsoft Dynamics 365 platform.



2019: New Tools and Solutions for Nonprofits

Microsoft introduces new tools and solutions to help small-to-mid sized nonprofits. These include:

- Microsoft 365 Business for Nonprofits Offer: Qualified nonprofits can get 10 free licenses of productivity tools.
- Microsoft's Digital Skills Center for Nonprofits: This offers product training and skill-building content to help nonprofits.
- Microsoft Nonprofit Operations Toolkit: This provides small nonprofits with a solution for project and awards management.

2020: Fundraising and Engagement Solution from Microsoft

Microsoft launches Fundraising and Engagement, which has nonprofit-specific capabilities and offers benefits from the full stack of Microsoft technology. This solution provides nonprofits with capabilities, including:

- Constituent management
- Opportunity management
- Donation management
- Payment processing
- Event management
- Recurring gift management
- Business intelligence powered by Azure

2021: Microsoft Cloud for Nonprofit

Microsoft announces Microsoft Cloud for Nonprofit, which combines multiple Microsoft platforms and products to meet common needs of nonprofits, including fundraising and engagement, staff collaboration, volunteer engagement and management, and program design and delivery.

Heller Consulting has participated as advisors at TSI Advisory Steering Team meetings and shared our expertise to help in the development of key aspects of the Fundraising and Engagement application.



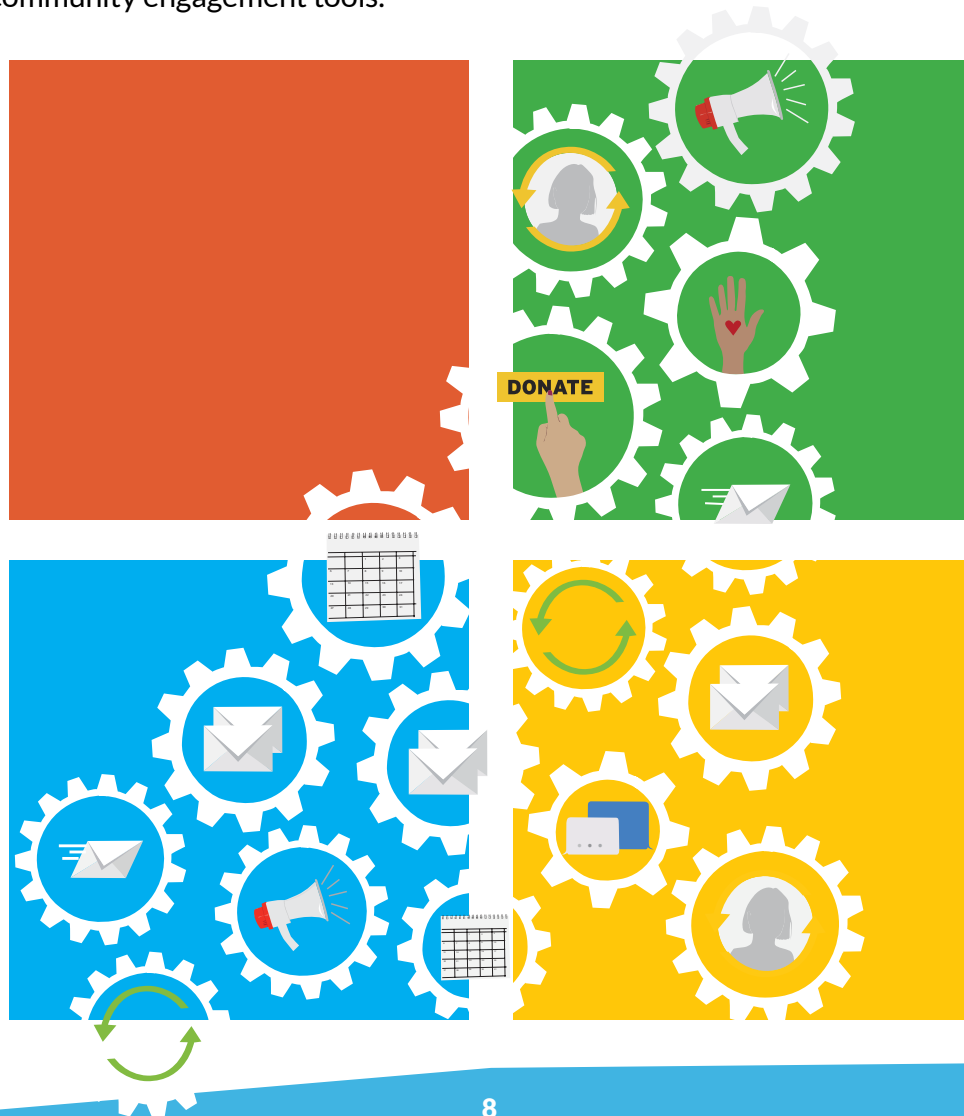
Things to consider before moving to a Microsoft solution

Your requirements

This might sound obvious, but a key consideration is how closely the system aligns with your organization's requirements. Start by listing your organization's must-haves, such as ease of use, features and functionality, and integration needs as well as budget. Then, refer to that list as you review the following considerations.

The Microsoft ecosystem

Take a look at all solutions available to you from Microsoft. In other words, if you choose Microsoft Dynamics 365 and Power Apps for your CRM system and business applications, there are many other solutions available within the company's ecosystem, such as productivity, volunteer management and engagement, marketing automation and journey orchestration, case and client management, and portals and community engagement tools.



Fundraising and Engagement from Microsoft

Fundraising and Engagement is a free, open source solution built on top of the Nonprofit Common Data Model and Microsoft's world-leading business application platform, Dynamics 365. The solution offers immediate access to real-time information on both loyal donors and prospects so you can engage them in a personalized way. Team Heller is trained and certified to implement and support Fundraising and Engagement through the Microsoft TSI division, and we are ready to help you determine whether Fundraising and Engagement is right for you, develop a business case and roadmap, and implement and support the solution.

Microsoft Cloud for Nonprofit

Microsoft's 2021 launch of Microsoft Cloud for Nonprofit takes the Fundraising and Engagement solution and makes it a full-service nonprofit toolset that includes volunteer management, engagement with all types of supporters, and program management tools that will allow you to see the direct impact of fundraising dollars on your mission objectives. Microsoft Cloud for Nonprofit can transform daily operations for nonprofit marketers, fundraisers, volunteer managers, and program managers. We will continue updating [this blog post about the solution](#) with the latest information about Microsoft Cloud for Nonprofit.



App marketplace and integration options

Be sure to understand the third-party applications that integrate with Microsoft Dynamics 365. For example, Microsoft's App Source is smaller than some other solutions in the marketplace today but might have the solutions you need. Microsoft also offers integration options using Power Automate, with hundreds of pre-built connectors. Both solutions also support API integrations.

Data model

Microsoft's nonprofit offerings are built on the Nonprofit Common Data Model – a data model that was developed with the help of multiple nonprofits and technology vendors. Be sure to understand this model, as it determines how your data will be mapped from your current system to the new system and might require changes to your processes to function optimally.

User experience, adoption, and enablement

Be sure to review the look and feel of the system, as well as how the system organizes navigation, to better understand if the user experience will work for your nonprofit. As you look at the system, keep in mind your staff's technology experience.

Also, consider how long it will take your organization to learn and begin using the system. This will depend not only on specific technology knowledge, but also on the degree to which you will need to update or change business processes to use the new system and how your organization handles change management (preparation, change communication, user training, reinforcement, etc.) as you move to the new system.

System maintenance and administration

Make sure you understand what it will take to maintain the system and handle user profiles, roles, permissions, data access, and overall security. Be sure to consider the size and experience of the staff that will be maintaining and administering your system. For example, if you are already using Microsoft Azure and other Microsoft tools, your IT team might have less of a learning curve to incorporate Dynamics 365 into the mix. this model, as it determines how your data will be mapped from your current system to the new system and might require changes to your processes to function optimally.



Pricing

Of course, there's always that big (and important) question: How much does it cost? To help you answer this question, here are some key aspects to consider about Microsoft pricing for nonprofits:

Software license fees

Microsoft offers consumption-based license fees. This means that you pay only for the licenses you use on a monthly basis. So, for example, if you reduce your user count for a few months because a staff member leaves your organization (and you deactivate that user account), then you do not have to pay for that unused license.

Azure fees

Microsoft Azure is a cloud computing platform for building, testing, deploying, and managing Microsoft-based applications and services. With Microsoft, you must have an Azure tenant, and there are things that must be set up in that Azure tenant to be able to set up Fundraising and Engagement on Microsoft Dynamics 365 as your CRM platform.

There are some ongoing Azure-related costs when you move to Microsoft as your CRM platform, and it's important to include these in your evaluation. At this time, Microsoft offers qualified nonprofits a \$3,500 Azure credit per year, and you must re-apply for the grant each year.



Portal costs

You have multiple options when it comes to the portal (or view/interface into your data) for your Microsoft CRM system:

- **Use a Power Apps Portal**

Microsoft has always offered basic portal functionality for Dynamics 365, allowing external users to interact with your organization's data. In recent years, this requirement can be achieved with Microsoft's on-platform portal solution — Power Apps Portals.

Power Apps features might be more basic than some third-party portal solutions and a custom portal, but Microsoft is investing in quickly expanding functionality. For example, as it is today, if you have complex security requirements around who can access which data, Power Apps Portals might not be the right fit. Similarly, if a highly customized user interface is critical, you might want to consider other options.

However, if your requirements are to share limited information from your CRM system privately with a set of external users, Power Portals can be a good solution. Power Portals come with initial implementation costs that are dependent on your goals and requirements, as well as regular licensing fees for users. Licensing can be either by named user (authenticated access) or based on the number of page views per month for unauthenticated users. With named users, the cost decreases as the number of users increases.

- **Third-party portal solution**

Vendors such as The Portal Connection offer pre-built portal solutions that might meet your organization's requirements. These third-party portals typically come with a portal administration interface to allow your organization to manage user access and control how data is exposed to external visitors. There are many other vertical-specific, third-party portal solutions that might meet your needs. Costs vary by solution provider, and typically include a startup or implementation fee and ongoing licensing or support costs.

- **Custom portal**

When the user experience is critically important, and you want complete control over the design and function of your portal, a custom portal might be the right option for you. This option typically comes with a high up-front cost for the initial build as well as ongoing costs for portal management and web application hosting. You might also need to budget for enhancements if you do not have in-house developers on staff.

Microsoft offers for nonprofits

Microsoft offers multiple grants and discounts for their products and services to eligible nonprofits. Be sure to familiarize yourself with these offers and keep them in mind as you consider Microsoft pricing. Microsoft is dedicated to helping nonprofits adopt world class security by moving from on-premise solutions to cloud-based solutions like Microsoft Cloud for Nonprofit. As a result, your nonprofit might be able to take advantage of related offers and discounts. If you have not already registered your organization with TechSoup, we recommend that you do so, as many nonprofit discounts are run through TechSoup. TechSoup also oversees the eligibility requirements for qualified nonprofits for Microsoft.



Taking the next step

This might seem like a lot of information to collect and analyze, but keep in mind that the Heller Consulting team is ready to assist. We can help you review your requirements, determine if Microsoft solutions are right for your organization, develop a business case and roadmap, and implement and support the solution.

Contact us today to find out more and get started.

ABOUT HELLER CONSULTING

We're committed to helping nonprofits make the most of their technology. Since 1996, Heller Consulting has been focused on helping nonprofits help others by developing and implementing technology strategies. We provide the streamlined solutions that enable nonprofits to spend more of their time working with people, not their IT platforms. After working with over 1,000 nonprofits across the United States and Canada, one thing hasn't changed — our passion for helping clients utilize the right technology strategies and systems to significantly expand the impact of their vital missions. Our team of experienced nonprofit software strategists and solutions experts love to help organizations find a better way of using technology to manage fundraising activities, donations, volunteer activities, program services, and outreach. We take the time and make the effort to fully engage all stakeholders in the development and implementation of CRM planning strategies and we believe it's just as important to carefully consider the system users as well as the constituents benefiting from it. **Whether you are looking for a quick audit to help you put together a blueprint or full-scale implementation, we can help. Visit our website at teamheller.com or give us a call at 510-841-4222.**



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