

# **5 EXPERT TIPS: CHOOSING TECHNOLOGY FOR YOUR NONPROFIT**

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# Introduction

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With the right tools, nonprofits can quickly **scale fundraising and programming** and **take back their time**.

But, what makes something the “right” tool? And how do you justify an additional expense in a resource-constrained organization?

Recently, we posed key questions on choosing - and using - technology to nonprofit professionals during our Fireside Chat: Choosing The Right Technology for Your Nonprofit.

In this guide, you'll find the top 5 things nonprofit professionals and experts think you should know when considering and implementing technology for your nonprofit.

Want to watch the conversation for yourself?  
[Check it out here](#)

# Choosing Technology for Your Nonprofit

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## Tip #1: Keep your people, processes, and technology balanced

There are 3 critical components to every organization

- People who do the work - writing grants, meeting reporting requirements, holding teams accountable, and ensuring proposals accurately reflect the mission of your organization.
- Processes that make the work more efficient - helping you stay on top of deadlines, identify the right funding opportunities, and scale grant strategies.
- Technology that automates and organizes processes and people - enabling quick communication, bolstering collaboration and organization, and ultimately, reducing employee burnout and increasing team capacity.

Think of these 3 as legs of a stool where each component affects the others - when not balanced, your seat is tippy and uncomfortable.

As you scale your team up or down, processes and tech will need to be updated. Likewise, as you add technology, your people and process should be adjusted.

The more you can get these components into balance the more streamlined and successful your organization can be.

**Action item:** Poll your organization on the question "Which of the following do you believe we're strongest in: People, Process, or Technology". Then outline 3 things your team can do in the next year to bring greater balance to that component.

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## Tip #2: Understand the different tiers of tech - and choose what works for you

Depending on the size of your organization, different tools are more or less beneficial.

For example, a smaller organization just starting out may find both the cost and complexities of large-scale technology to be overwhelming and counter-productive. They may find they're paying for features they don't need quite yet or for complex functionality which requires a dedicated technical employee to manage.

But, it's helpful to dedicate a small amount of your budget to technology from the very beginning to avoid clunky systems which will slow your ability to grow.

Instead, look for technologies that are simple to use and that offer plans that scale their features (and costs). This way, you can start out with what you need, but retain the ability to increase capabilities as your organization evolves.

**Action item:** Sign up for an [Instrumentl free trial](https://www.instrumentl.com) and identify the features your team needs now and later.

# Choosing Technology for Your Nonprofit

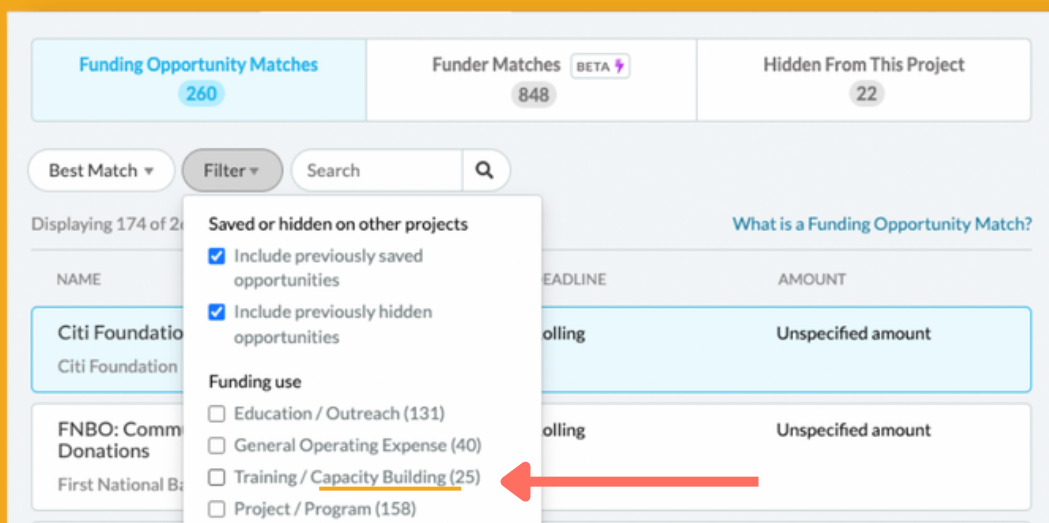
## Tip #3: Write technology into capacity-building grants

If you're using technology in your nonprofit, chances are you're seeing an impact - whether that's saving time or money on staff to keep things organized. Either way, it's an important tool that allows your organization to do more with less.

So, make sure you tell potential funders about it when applying for capacity-building grants.

Include the cost of technology you're using into your budgets and be sure to mention how that technology is going to allow your organization to build capacity and scale impact.

**Action item:** [Identify grant opportunities](#) for capacity building on Instrumentl.



# Choosing Technology for Your Nonprofit

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## Tip #4: Keep the key capabilities in mind

Cost and return on investment are always important. But be sure you're taking the total impacts into consideration when evaluating this.

Specifically, think about how the technology helps your organization save time, so that people can stay focused on the activities that add the most value - things like programming, fundraising, and relationship building.

Beyond time, think about how technology is going to help you to streamline your processes and, ultimately, open up more space in your organization to grow your impact.

**Action item:** Take stock of how much time it takes to prospect, write, submit and manage grant proposals. Ask yourself if there are processes or technologies which could reduce that time?

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## Tip #5: Think about implementation before you commit

Setting up new technology for organizations with limited bandwidth can be hard. To offset issues around implementation, look for technologies with good customer support and free resources.

This could include implementation specialists to optimize setup, regular customer training, and free informational workshops

Organizations should also be sure to block time regularly (once per month or quarter) to review the technology and identify what's working, what's not working, and what might be getting in the way of your organization making the most of it. From there, set up action items to get back on track.

**Action item:** After you set up your [Instrumentl Free Trial](#), book a time with one of our implementation specialists to optimize your search.

RSVP for an upcoming session on [Instrumentl's free workshop series](#) to find tips on dialing in your grant writing processes

# What to Do Next

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1. [Create your free 14-day Instrumentl account here](#)
  - a. **Save two months off an annual plan:** WORKSHOP2MO
  - b. **Save \$50 off your first month:** WORKSHOP50
2. [Submit your feedback for this class \(and get freebies\)](#): please rate it as well on the learning platform you found it on to help other grant professionals!
3. [Bookmark our blog](#): check out the Instrumentl blog for in-depth guides and free resources, including our grant workshop replays. New content is added every week.
4. [Register for our free live grant writing classes](#): Instrumentl hosts regular learning opportunities for nonprofit professionals to hone their grant writing skills. We hope you'll join us for our next one.

Feel free to pass along this course materials page to a friend or colleague you think may benefit from it.

Be sure to [create a 14-day Instrumentl](#) account to get personalized grant recommendations for your nonprofit.