Equity guide for nonprofit technology

Addressing inequities in the use, creation, and funding of technology

March 2025

nten

What's Inside

About us

We wanted to co-create specific guidelines for equitable nonprofit technology use and creation.

In 2016, NTEN's board retreat and staff planning meetings included a facilitated activity to identify trend lines into the future for our community and the broader sector. Were there things that would get better or worse, easier or harder, or become more necessary or less valuable? We grounded our work in the directions we saw ahead. The topic that had consistently high consensus by both board and staff was an increase in inequity within the sector and a growing need for equity-based guidance.

We knew then that we wanted to co-create specific guidelines for equitable nonprofit technology use and creation. Still, we wanted to first invest in establishing a concrete baseline for those conversations. This involved soliciting more community-authored articles related to equity, crafting intentional equity-related sessions at the annual conference NTEN plans and hosts (the Nonprofit Technology Conference), and being far more public about NTEN's internal equity work.

In 2019, we convened a diverse working group from across the NTEN community. Through interviews, feedback surveys, facilitated discussions, and content creation in both small groups and the full working group, we arrived at a complete set of guidelines addressing the use, creation, and funding of technology. NTEN's board and staff, as well as the Community Equity Committee, were also engaged in the process of creating the guide.

In the year that followed, we saw technology continue to change and the implications for the sector continue to create inequities for staff, missions and communities. In 2023, many organizations were starting to more actively consider and change internal processes to reflect the increasing prevalence of generative AI tools. We've updated the guide to reflect additional data privacy, decision-making, and tool-selection guidelines for organizations, especially those working to understand how to focus on equity while adopting AI tools. Now, in 2025 with the most recent updates to this guide, organizations are navigating the changing technology dynamics driven by political landscapes and international policy shifts.

Just as our organizations change over time, so too will this guide. The multiple revisions of this guide reflect the reality of technology: it is not static, and as tech changes, our processes governing tech must also change. Your use of this guide, and your feedback, will contribute to the entire sector becoming more equitable. We are committed to advancing the impact of the NTEN Equity Guide by extending its reach and adoption through periodic updates.

Contributors

Thank you to all those across NTEN's community who contributed to the NTEN Equity Guide, especially the work group members.

If you would like to be part of future discussions of the guide's content or would like to join the work group, please email Amy Sample Ward, NTEN's CEO, at amy@nten.org.

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How to quote

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Introduction

Nonprofit technology is marked by inequities in both the technology sector and the nonprofit sector. You can see this in staffing, processes, and the way technology tools are implemented.

Digital technologies, including AI tools, can also reflect these inequities and result in inequitable distribution of resources and/or work. These inequities within our organizations and our sector must be dismantled if we want to address our communities' needs permanently. Whether you're a user, builder, or funder, you have a responsibility to ensure the equitable use of technology.

NTEN focuses on supporting nonprofit staff in using technology strategically and equitably to meet their missions and community needs. It became clear that we needed a resource to guide equitable decision-making and investment at all levels. And so, we began the process of designing this guide in 2017. In subsequent years, the issues have not changed. Consequential trends, including the global pandemic, the largest mobilization of protests for racial justice in history, and the rapid advancement of artificial intelligence, have reinforced the need for a tool to support decision-making processes.

Terms in this guide are common but used here with specific intention. *Technology* refers to the physical and digital tools that an organization uses to help deliver its mission; for example, technology describes phones and computers, as well as artificial intelligence and websites. *Data* refers to the digital information collected, stored, and analyzed; examples include donor contact information, employee status, financial information, and more. *Product* refers to specific digital applications an organization uses; these can be products purchased off-

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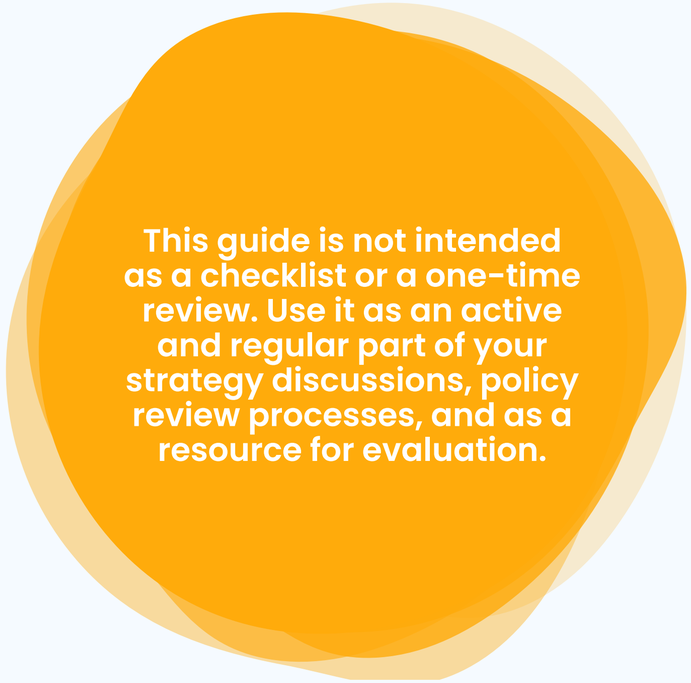


the-shelf, such as a customer relationship management database or project management product, or a custom-built tool, such as an app to communicate with community members. The broader term, technology, includes both data and product.

The guide was created through a collaborative process with diverse community members who acknowledge it is merely and continually the beginning. We will evolve the guide as it mirrors changes in society. You'll find that equity, particularly racial equity, is central to this document as a reflection of NTEN's commitment to advancing equity as an intersectional issue. Our commitment acknowledges that the foundation of all equity work is antiracism due to white supremacy's oppressive dominance in all systems, large and small, that we interact with in our day-to-day lives (overtly and covertly).

NTEN's content, research, and training are leveraged by nonprofit staff to advocate for and implement changes in their work. We do not recommend products or have an interest — commercial or otherwise — in which products, vendors, or services you or your organization may use. NTEN focuses on the ways technology is used and the ways nonprofits can meet their missions. We hope you'll agree that this guide is an integral part of NTEN's intent to reach its mission by supporting yours. We offer this guide in the spirit of advancing the nonprofit sector's commitment to equity and the communities it serves.

This guide is not intended as a checklist or a one-time review. We hope you will use it as an active and regular part of your strategy discussions, policy review processes, and as a resource for evaluation. Customize this for your organization — talk with your staff, community, and board to understand their unique needs, and continue evolving its role. If you create technology, we hope you will use this to make public the degree to which you may live these practices and how you plan to improve. If you fund technology or are a part of organizations that fund nonprofits, we hope you will do the same.

We acknowledge that organizations of different budgets and staff sizes may have obstacles to their capacity that make complete adherence to this list difficult. Ultimately, these are technology-related guidelines, but technology does not and cannot succeed without an organizational culture that supports it. Similarly, to advance these equity-based guidelines, organizations need to adopt and operate with a commitment to ethics and equity across all their work areas.

Commitment to tech equity

Many aspects of this guide require both an understanding of and a commitment to equity in many forms for your staff, constituents, and our collective world.

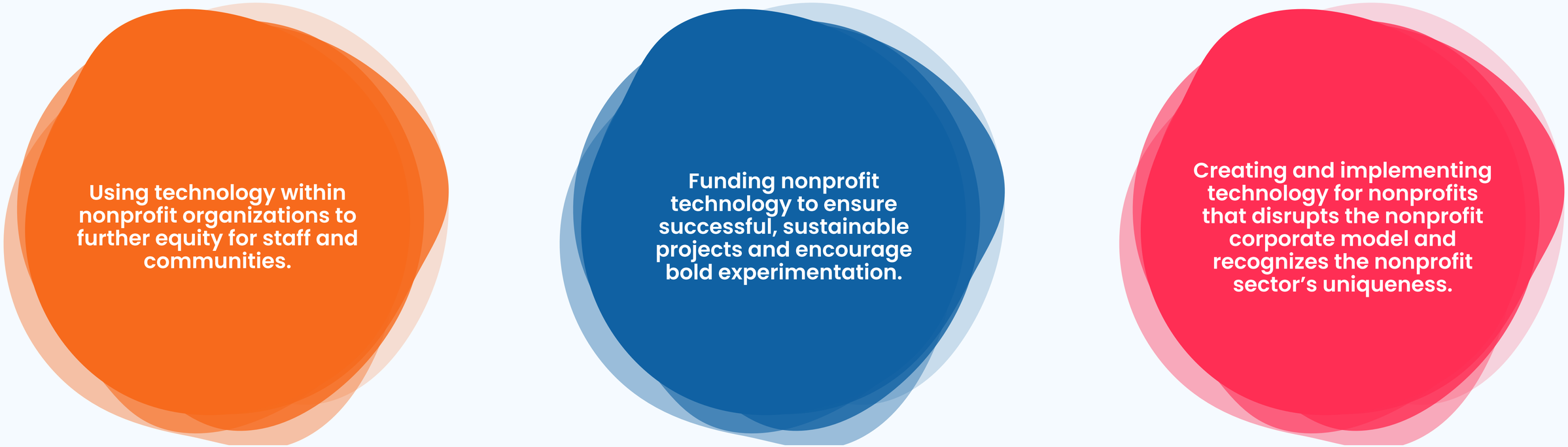
The compounding systems of oppression that have operated around and through our organizations, sector, and society will not be dismantled easily. These include white supremacy, racism, capitalism, sexism, ableism, homophobia, and transphobia.

No ethical framework for technology is singularly sufficient to meet this challenge. But we hope that this document will help nonprofits, funders, and service providers:

- Acknowledge, examine, and intentionally dismantle white supremacy and other forms of racism.
- Minimize power imbalances between funders/grantees, management/staff, nonprofits/constituents and communities they serve, and vendors/nonprofits.
- Create more accessible organizations from which everyone will benefit.
- Meaningfully return power to staff and community members, regardless of job title or technical experience, to decide their futures.
- Hold technology funders and providers accountable to (and in relationship with) the nonprofits and communities served through their investments.
- Create organizational cultures that can adequately support and learn from individuals who have lived experiences of marginalization.
- Value and protect the contributed expertise of our communities.
- Build nonprofits that are capable of uprooting oppression and not just treating the symptoms.

Using this guide

The guide is divided into three sections reflecting different nonprofit technology categories. Your organization may participate in one or more of these categories:



Commitment to decision-making

How organizations make decisions about technology is just as important as any strategic decision they make. Strong decision-making processes often lead to more equitable outcomes. When making choices about tech within nonprofit organizations, teams should apply the following principles:

- **Inclusivity:** Include representatives from relevant diverse stakeholders, such as different levels of employees, community members, tech experts, program experts, and partners.
- **Transparency:** Document processes with clear and shared decision criteria.
- **Accountability:** Ensure oversight and adherence to decision-making processes and organizational values.
- **Mission-alignment:** Support the organization's stated mission and values.
- **Sustainability:** Consider the long-term impact of decisions.

These guidelines apply generally to an organization's decision-making about technology as well as its approach to any decision they may be facing — regardless if it is directly "tech-related" or not (chances are, even that decision touches important technology elements). As technologies rapidly evolve and proliferate in the social impact sector, these principles should also apply to the design and use of the tools to come.

Using technology in nonprofit organizations

Technology touches every aspect of a nonprofit for both staff and constituents, including collecting and using data, how communication and training occur, and even their access to necessary tools.

Because of technology's vast influence, it can easily create or exacerbate inequities both inside and outside the organization. These guidelines define nonprofits as formally established, community-based groups and coalitions working on social impact, or grantmakers. Use this section as a starting point to implement technology in a way that instead furthers equity.

Some corporately developed technologies, especially AI products, unfortunately do not provide accessible pathways for nonprofits to influence the development or the selection of datasets that underlie the products' functionality. Nonprofits are even further removed from decisions about the environmental footprint and energy use required for these products to run. Decisions about when and how to introduce these products into a socially and ethically conscious environment should be approached with considerations for promoting equitable technology and data use covered in this guide.

Promote equitable tech for staff and constituents

Do not assume technology expertise

Access to various technologies (including Windows and MacOS operating systems, productivity or project management applications, and relational databases) is not equal or equitable for all potential or even current staff. To address this, hiring and staff development practices must not equate technology experience with staff value. Instead, focus on building technology skills on the job.

- Whenever possible, develop technology skills on the job. Do not require "foundational" skills like Microsoft Office for new hires.
- Invest in training. Provide all staff with ongoing training opportunities for learning tools and skills.

Many technology products, especially AI products, are often touted as simple enough to be imported into the workplace and quickly adopted by staff, who will learn by using the products. Effortless learning does not happen in reality. For example, in order to effectively use generative AI tools, individuals need a basic understanding of how AI tools work and their limitations. Make sure to include this training and development, as well as general guidelines, into your organizational planning.

Make training accessible

Ensuring everyone on a team can learn and grow is critical to building effective and equitable organizations. Training and other staff development methods should be inclusive and accessible — everyone, with a disability or not, benefits from a more accessible world.

- Ensure that examples and pictures in training materials reflect a diversity of experiences.
- Make training materials and facilities accessible to individuals with auditory, visual, physical, and other disabilities. Prioritizing accessibility creates a world that is easier for everyone to thrive in — regardless of disability.
- Provide internal training materials in the languages prevalent in the community.
- Ask current trainees what accommodations they need to learn. When creating recorded materials, consider the needs of future staff, not only the current staff.
- People learn in different ways. Support different learning styles and neurodiversity by offering several different types of training.
- Encourage trainees to connect with other users of the product outside of the training. This builds community and additional support.

Build inclusive teams

Technology touches every aspect of an organization's work and has significant power to uphold or disrupt systemic oppression. To ensure technology furthers equity, make sure there is a diversity of experiences among those who implement, support, or make technology decisions, including leadership.

- Follow inclusive practices in hiring. For example:
  - Share salaries publicly in all job postings.
  - Eliminate education requirements unless clinically or legally required for a specific job.
  - Eliminate unnecessary physical labor requirements (for example., lift 25 pounds).
  - Do not evaluate applicants based on writing style.
  - Do not evaluate applicants based on "fit" or "culture."

- Build hiring processes and relationships with community partners and other organizations to attract a diverse pool of applicants. Prioritize hires from the community you serve, balanced with a need for a diversity of marginalized experiences. Spend the time and money to find the right person.
- Create and retain inclusive teams.
  - Hire adequate diversity and set team norms so that the dominant culture is not white/cisgender/able.
  - Use trauma-informed management strategies. Accept individuals who cannot compartmentalize their lived experience and "leave it at the door."
  - Support different learning styles for enablement and training. Account for cognitive differences in trainings.
  - Create clear pathways for advancement and support the long-term success of the team.
- Center staff and constituents in all technology-related planning and decision-making by including staff from across the organization and community members with experience at all levels of programs or services.

Require equitable equipment policies

Access to equipment is an organization's responsibility and should not be based on organizational chart hierarchy, economic class, or the employee's ability.

- Do not mandate 'Bring Your Own Device' approaches for staff, even if a stipend is provided. This includes mobile devices for multi-factor authentication.
- Prioritize staff's comfort, health, safety, and accessibility. Provide access to additional monitors, comfortable seating, standing desks, or adaptive technology supports without complex bureaucratic processes.
- Balance the requirement to participate in the workplace with flexibility to accommodate individual needs. For example, requiring screens to be on all the time during a virtual meeting may be an inequitable policy, as people may need to move around, may not be in a space where they can physically be on screen, or may not want to expose family or public that may be in the background.
- Tier standard equipment by need, not by organizational hierarchy. Do not provide better equipment to the executive team than the rest of the staff.
- Provide money for cell phones, internet connections, and office equipment for staff who must work outside the office due to accessibility needs, health, safety, or organizational policy.
- As new technology services and products are considered, provide adequate budget for pilot or test accounts to ensure individual staff are not using personal credentials for organizational technology use.

Make technology accessible

Staff and community members' participation should not depend on their ability — your mission needs everyone's expertise. Ensuring every person can participate will make it easier for everyone.

- Make all public-facing materials and systems accessible to individuals with different visual, auditory, language, and other needs. Wherever possible, offer materials in multiple formats to support neurodiverse participation.
- Consider the cultures and languages used by staff and community members. Avoid defaulting to white/cis/able/English normative language.
- Offer captioning or live-signing and translation for all digital events.
- Include an accessibility analysis in the selection of all new technology used within the organization. Implement technology that will work for future staff in addition to the current staff.

- Consider explainability and accessibility when deciding between tools, especially quickly emerging technologies like AI products.

Support remote and hybrid work

Not everyone can thrive in an office environment. Flexibility will help in hiring and retaining staff from a diversity of backgrounds. Additionally, supporting remote work can provide a more equitable workplace, as it allows people to engage in different ways (such as written and verbal communication during meetings), allows organizations to accommodate different work schedules for a wider diversity of employees, and can facilitate formal information-sharing practices.

- Have defined work-from-home and flexible schedule policies. Make these accommodations universally available to all staff, not only leadership. When this isn't possible due to logistical issues, offer alternative benefits of equal value.
- Invest adequately in technology and training to support remote work. Do not use artificial barriers of cost or security to prevent staff from working from home.
- Do not require extra labor of employees working outside the office for time tracking or supervision than what staff in the office experience.
- Keep remote work humane. As much as possible, allow individuals to work flexible hours when needed for childcare and other life realities. Do not require people to work or respond outside of the hours they intend to be available.
- Do not micromanage remote staff. Use the same systems of accountability for in-office work as remote work.
- Do not penalize people for having remote workspaces that don't align with corporate norms. Embrace diversity of settings and be patient with noise and background video from children, partners, pets, and daily needs.

Include users and constituents in implementation processes

Technology implemented in a vacuum cannot meet the needs of a diverse staff and constituent base.

- Include a diversity of organizational departments and hierarchical power, race, gender, and ability in teams responsible for selecting and implementing new technologies.
- Include representation from everyone potentially impacted in technology planning and decision-making. This includes users, community members, constituents, and others, depending on the technology.
- Pay people for their expertise. Compensate community members at an equivalent hourly rate to the staff.

Access to equipment is an organization's responsibility.

- Conduct testing for accuracy and community reception for new tools, especially AI-enabled products. Ensure the tools produce improved outcomes (such as improved time or cost) with minimal errors over the status quo before expanding the use of the tool.
- Close the loop. Let people know how their feedback was used or not.

Data use

Minimize extractive data practices

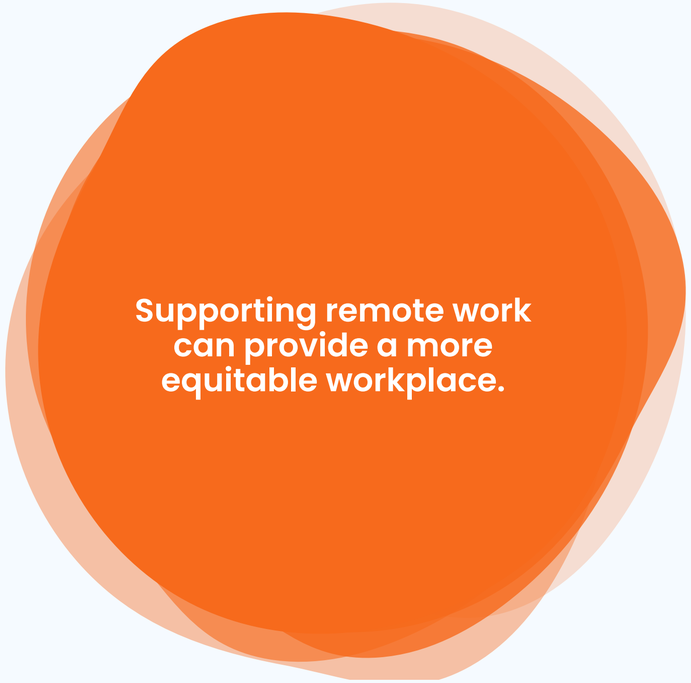
Data about constituents belong to the constituents. Sharing that data with nonprofits can be uncomfortable and a barrier to receiving services.

- Be transparent with constituents about what data is collected, how it will be used, and how long it will be kept. Use trauma-informed practices when collecting this information to minimize additional harm to constituents.
- Consider secondary trauma for staff collecting stories and other data from constituents. Ensure staff has access to the time, tools, community, and other resources they need to process and heal.
- Allow constituents to opt out of data collection whenever possible.
- Do not collect any more data than is necessary for reporting requirements and to improve program quality.
- Strive for security by design. Products should have strong security settings, such as requiring two-factor authentication, enabled by default.
- Strive for privacy by design. Protect the privacy of organization and constituent data by anonymizing data when personally identifiable information is involved, enforcing access control policies to data, and adhering to documented data sharing policies.
- Select opt-out products when possible. For AI tools, select products that do not train on customer data.
- Advocate for constituents when negotiating with funders. Push back when funders ask for data that might limit participation, put participants in danger, or make participants uncomfortable.

Protect stored data

Constituents, donors, and staff should never need to consent to unsafe or indefinite data storage practices.

- Understand the organization's regulatory requirements.
- Have an internal policy outlining how staff should use, store, and share data. Train users on these policies. Ensure users have the time and tools to follow them.
  - Document what data is low-risk and what data is high-risk for feeding into AI products.



- Have a data breach plan that meets regulatory requirements and prioritizes constituents, donors, and staff. Inform individuals as quickly as possible in the event of a breach.
- Have a documented data disclosure plan that describes what notification and actions should be taken if sensitive data is fed into an AI product.
- Provide and publish a method for individuals to request their data be deleted (to the extent possible, given regulatory requirements).
- Decide on the minimum possible duration for the storage of constituent, donor, and staff data storage. Delete any identifiable data after this period has elapsed.
- Constituent information is precious. Protect it with the same precautions expected when handling financial information. Invest as needed to support these practices.
- Have a documented plan for how to review, notify, and potentially pause the use of generative AI products that hallucinate or provide inaccurate information.

Advocate for equitable use of staff time

Funders often request data to be collected in specific formats or tools. Organizations often have their own internal data collection systems to measure and increase efficiency. These practices can put an undue burden on staff.

- Measure, benchmark, and minimize the percentage of time staff spends on data collection versus service delivery.
- Advocate for staff when negotiating with funders. Push back against double data entry and inefficient systems.
- Invest in training and technology that automates time-consuming or tedious data management tasks. Measure qualitative and quantitative metrics of staff time before and after new system or tool adoption to evaluate value.

Data sharing

Be intentional about sharing collected data. Limit the sharing of identifiable information but pursue transparency in your overall program outcomes.

- Make aggregate outcome and service delivery data available to constituents. Close the loop so they can see what their data is helping to achieve.

Advocate for staff when negotiating with funders. Push back against double data entry and inefficient systems.

- In the event of a merger, be intentional about combining data sets. Individuals who consented to share data in one circumstance may not agree to its use in different ways.
- Get explicit consent for sharing non-anonymized data with other organizations. Share identifiable information safely and create documented expectations for the receiving organization's practices.
- Give service delivery staff access to the data they collect. Invest in tools that help service delivery staff get useful insights out of their data-related labor.
- When sharing stories and other personal details publicly, discuss how they will be used and any possible risk with the individuals involved. Ensure people understand the risks and can rescind consent.
- Compensate constituents for the use of personal stories, particularly when asking them to recount trauma.

Use data-informed decision-making carefully

Organizations face enormous pressure to use data in decision-making at the program and individual constituent levels. These decisions can easily be biased through low-quality or inadequate data. Use data only as one resource in decision-making.

- Evaluate all data sources and AI for biases that reflect racism, misogyny, ableism, and other forms of systemic oppression.
- Be cautious of data sources and AI that perpetuate systemic oppression, reflect bias, or are not diverse enough to compare to the community adequately.
- Disaggregate data carefully based on experiences of marginalization like race, gender, ability, and class. Ensure programs positively include and impact all participants.
- Track demographic data in all possible stages of programs, potentially including initial contact, intake, service delivery, and long-term outcomes, to monitor program participation differences based on demographics.
- Implement human-in-the-loop models when using decision-making based on algorithms. Be transparent about algorithm use and provide an opportunity for manual review by a person. Ensure that staff and communities impacted by these algorithms are part of deciding their design, use, and assessment.
- Remember that data cannot represent the full nuance of service delivery. Prioritize relational aspects of the work. Include qualitative forms of data and evaluation.

Encourage self-determination

Personal experience is nuanced and complex. Use participatory processes to decide on program metrics and demographic data points. Give constituents ample options to fully describe themselves.

- Track complex and non-binary race, ethnicity, gender, ability, and class demographic information. Use community-defined options for these questions.
- Specifically invite constituents to self-select into distinct societal experiences (including POC, Black, Indigenous, Latinx, disabled, nonbinary, transgender, and queer.)
- Generate metrics of overall program success in collaboration with program participants.
- Support constituents in defining their success criteria for programs. Do not make organizational assumptions about a participant's definition of personal success. Constituents should have the power to tell their own stories.
- Make clear how constituents can see, edit, or request the removal of their data in part or entirety.

Technology procurement

Spend funds equitably

As a sector, nonprofit organizations have significant purchasing power and should use that power to further equity in any kind of technology investments.

- Whenever possible, spend money on vendors in the local community — owned by individuals from systemically marginalized groups.
- Understand the organizations and companies engaged as vendors. Acknowledge when those companies harm the community. As much as possible, minimize the support of these organizations and companies.

Consider sustainability

Nonprofit organizations are often under-resourced and can have unpredictable funding issues. Technology expenditures should be evaluated carefully for sustainability.

- Carefully consider pro bono services if the organization couldn't otherwise afford them. If pro bono services are used, scope the project clearly, and only work with providers who have significant nonprofit sector experience.
- Consider future funding requirements for licensing, maintenance, and staff when investing in technologies that will require ongoing investment.
- Recognize the role that staff play in contributing to sustainability and the training and support needed for them to support the long-term sustainability of technology tools and systems.

Do not make organizational assumptions about a participant's definition of personal success. Constituents should have the power to tell their own stories.

Remember that data cannot represent the full nuance of service delivery. Include qualitative forms of data and evaluation.

Plan for training & change management

Nonprofits are often understaffed and do not always have robust internal processes. Implementation processes should be careful to compensate for these issues with substantial training and change management.

- Include training as only one aspect of an overall change management strategy.
- Provide multiple opportunities and methods for users to provide input into the project.
- Communicate early and often about the status of the project.
- Provide ongoing training and change management processes to support the project after initial implementation.
- Do not cut training and change management when the budget gets tight. Prioritize this component of projects.
- Build in a process to collect and respond to feedback from staff and constituents on new changes and new training.

Engage your Board of Directors in strategic tech planning

Your organization's Board members likely have a diversity of perspectives, experiences, and areas of knowledge from their own lives and work. The central responsibilities of a Board include financial oversight, mission and strategic direction, and risk management. Strategic technology decisions should include the board so that technology and data topics are aligned with these critical areas of organizational management.

- Include board members in technology capacity building focused on program evaluation, data privacy, compliance, and other strategic topics.
- Ensure board members understand the parameters of your cybersecurity insurance policy and participate in security scenario planning.
- Integrate technology project or roadmap updates in regular reports to the Board.
- Provide training for all board members about relevant laws or compliance requirements specific to your programs, funding, and/or participant data.
- Develop metrics and goals for technology-related budget planning and reporting with the Board.

Funding for nonprofit technology

How technology investments are made determines outcomes for staff as well as programs. Who funds technology? The following guidelines consider funders to be those who provide direct financial funding for nonprofit organizations.

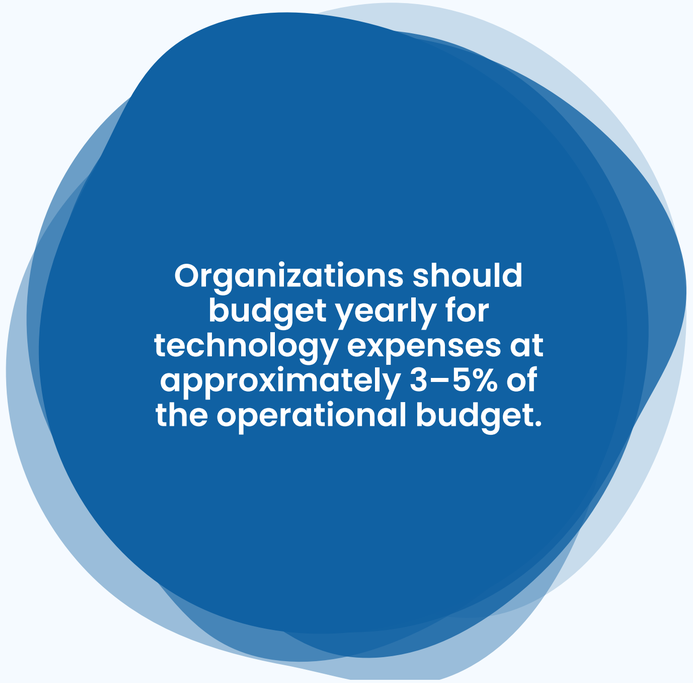
This includes nonprofits, grantmakers, corporate sponsors, and vendors. There are also many guidelines here that apply to all organizations, whether they are nonprofits or foundations. Ultimately, technology is not an isolated investment and needs to be acknowledged in budgeting and investing as an integrated part of an organization.

Funding guidelines

Invest appropriately in technology

Technology is a fundamental operational support of nonprofit life. Funders and organizations must invest in it appropriately.

- Grants should be inclusive of comprehensive expenses (including technology). Programs and services cannot operate without the technology used to communicate with participants, manage their data and participation materials, provide them with resources, and more.
- Fund technology capacity building and staff skill-building, even when there is not a specific project. This can include funding for attending conferences, webinars, and in-person meetings where training and strategy on technology will be covered.
- Provide access to publications that discuss technology trends, with special attention to publications that cover the ethical and social impact implications of technology.



- Investments should reflect the need for all aspects of successful technology use (such as training, change management, usage guidelines, best practices, and support).

Spend intentionally

- Organizations should budget yearly for technology expenses at approximately 3–5% of the operational budget.
- Organizations should include technology budgeting as part of every planning process.
- Technology must be justified in terms of its benefit to constituents and staff. Do not invest in technology for the sake of technology or at the direction of a grantmaker, sponsor, or external advisor.
- Decide if extensive use of technology is required for the success of your mission. If it is, make technology planning and budgeting a priority at every level of your organization.
- Organizations should track technology expenses separately from office supplies or other equipment.

Technology should be considered a program expense

Technology supports service delivery and should be considered an integral part of all program funding and budgeting.

- Include technology expenses as part of program budgets (including a reasonable percentage of operational needs like internet, technology support, maintenance, and upgrades).
- All grants should include funding to support technology, not only for applications to technology-specific grant programs.
- Grants should allow flexibility for iterative development and testing of technology, especially AI tools. Organizations should be supported in starting small and proving the use case before expanding the technology within the organization.
- Grants with significant data collection or evaluation requirements should support that work with additional funding for technology and data analysis staff.

Fund inclusive decision-making

Deciding on the right off-the-shelf tools or designing new tools is difficult. Technology projects should be funded with enough support for iterative and participatory processes.

- Organizations should not be expected to know the correct technology tool before receiving funding.
- Funders should provide support to select and implement new systems, as well as training for all staff to be successful.
- Implementation costs should include support for participatory, iterative processes. Include all staff levels in designing new systems. Include constituents when designing and implementing constituent-facing systems (and compensate them for their labor).
- Funders should not mandate specific technologies or approaches. Organizations should have the freedom to select the right systems for their use.
- Funders should provide support for end users and stakeholders to be included in the product design and evaluation. Participants should be compensated for their time and contributions to the design and evaluation processes.
- Funders should provide support for decision-making at multiple points during a project lifecycle. As AI tools, especially, rapidly evolve, functionality and terms and conditions can change. Organizations may need to re-evaluate the use of particular products, or modify internal processes, based on these changes.

Support experimentation and failure

Technology has the potential to open up radically new approaches to nonprofit service delivery. However, these approaches are experimental and come with risk.

- Organizations must be supported in taking risks.
- Organizations should experiment with new ideas and solicit funding to support new approaches. Failures should be accepted and shared broadly.
- Organizations should define success metrics for new technology (such as number of people served, response time, hours of work saved, or costs avoided). Organizations should periodically review technology projects for impact, and make decisions on whether or not to continue to use the technology.
- Funders should provide general operational funding for organizations experimenting with new technology-supported service delivery models. Funding should be significant and supplied with the knowledge that the organization's attempts and learnings will likely include iterative prototyping and experimentation.
- Funders should not penalize failed technology projects. Failure is how we learn.
- Organizations should get technical support in participatory design, rapid prototyping, and software development practices. These are new skills for some organizations.

As AI tools, especially, rapidly evolve, functionality and terms and conditions can change. Organizations may need to re-evaluate the use of particular products, or modify internal processes, based on these changes.

Corporate funding

Do not conflate product donation with cash funding

Donations of software, hardware, and services do not replace the need for cash funding. Donation strategies should focus on nonprofits' long-term sustainability and be part of a larger plan for supporting organizations.

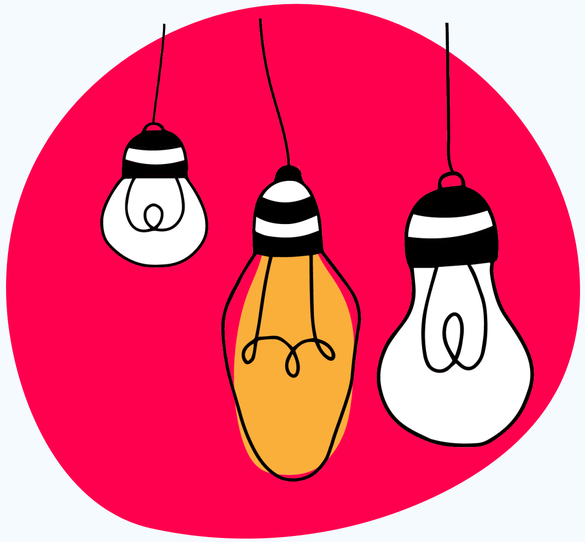
- Do not require nonprofits to use your products to receive funding. Fund the implementation of competitors' products if they will best serve the nonprofit.
- Always provide adequate cash funding to support the implementation and support of any product donations. This includes the technical work, but also the user group sessions, communications, and process training required for a successful technology implementation. Product donations shouldn't come with additional costs.
- Assist organizations with understanding how new products will fit into their tech environment. If new products are incompatible with an organization's existing products or require a significant amount of time and effort to overhaul systems, the new products may not be worth it to the organization.
- Provide general operating support to nonprofits as part of an equitable corporate giving strategy.

Give for impact, not visibility

Corporate giving and volunteering programs are a necessary and valuable effort to reinvest in communities, especially where commercial benefit has been gained. However, an investment must be made for change, not to signal your brand's generosity.

- Do not use a position of power to pressure organizations into accepting volunteers or pro bono consultants. Only pursue volunteer opportunities when there is a clear benefit to the organization and community. Otherwise, make cash donations.
- Nonprofit organizations should proactively create a gift acceptance policy with clear guidelines about the types of gifts and funders that will be accepted.
- Volunteers should be accompanied with the funding necessary to manage them and ensure efficient use of their time.
- Be cautious when using nonprofit constituents in publicity campaigns — the inherent power dynamics are difficult to navigate. If the stories of nonprofit constituents are used, get informed consent. Compensate constituents at a rate that fairly reflects their role and at least matches your staff's hourly rate.
- Define internal processes for ensuring corporate accountability in giving practices. Do not give donations for the publicity and then abandon the organization.

Do not require nonprofits to use your products to receive funding.



Creating technology for nonprofits

Nonprofits, funders, and technology vendors each create technologies that nonprofits use. These tools are sometimes designed specifically for the nonprofit sector or even for niche mission types, including grantmakers.

Still, many technologies nonprofits use today were not built with them or their communities in mind. Ultimately, the technologies nonprofits use come with bias from those who created them and the anticipated original customer. Consequently, the data nonprofits collect and rely on, how nonprofits communicate or interact with constituents, and even how they deliver programs or accept donations may be filtered through a commercial lens that does not reflect the unique needs, expectations, or care appropriate for nonprofit work.

The term “provider” is primarily used in this section to highlight that all kinds of organizations are responsible for driving technology in the nonprofit sector, including nonprofits, funders, and vendors. These guidelines are relevant to corporations, social enterprises, small companies, and nonprofits who create, implement, and support technology.

Sales and marketing

Follow ethical sales guidelines

Nonprofit organizations are providing critical community services. When selling to nonprofits, prioritize the needs and use cases of their work over making the sale. Explicitly address the positive and negative impacts to the organization staff and to their affected community. Help organizations avoid unnecessary or unsuccessful expenditures.

- Sales processes should be mutually beneficial. The provider should discuss their approach and strengths and weaknesses openly so that the organization can make an informed decision (even if it costs the sale).

- Providers should be clear about the breakdown of pricing and educate organizations about individual components. There should be transparency in what is included as-is versus what is an add-on feature at additional costs. Providers should support nonprofits in removing unnecessary components (even if that decreases the sale size).
- Providers and nonprofits should define and work through a list of use cases. Providers should be transparent if their solution cannot meet some of these needs or only do so at additional cost.
- Providers should be clear about which features are upcoming, partially available, or only available with additional customization. Be transparent and honest about your upcoming roadmap and timeline.
- Providers of AI products should be clear about the error rates, hallucinations, known data biases, and other accuracy issues that exist in the product.
- Providers should supply organizations with suggested repair and recovery processes for inaccurate AI-generated output.
- Providers should recognize that a nonprofit's relationship with the product far outlasts the sales process. Providers should work with nonprofits to define what long-term maintenance and support of the product will require of the nonprofit.
- Transparency is required for financial kickback, incentive agreements, and partnership structures. Nonprofits must understand the potential conflict of interest in selecting the recommended vendors or consultants.
- Providers should be transparent about sources of training data for AI products. Providers should also be transparent about how customer data inputted into AI products is or is not stored, used, and shared by the provider.
- Providers should be transparent about what kinds of nonprofits they will and will not sell or donate to (including the type of nonprofit, budget, issue area, affiliation, or constituency).
- Providers should be transparent about their attitude, policies, and enforcement against the sale of their products and services to hate groups as identified in any given country.
- Nonprofits selling technology created to support their services should frequently and intentionally confront the tension between the need for earned revenue and the need for as many nonprofits to benefit as possible.
- Nonprofits should consider the relative merits of providing free open-source solutions versus selling fully supported solutions to the nonprofit community.

Pricing tiers or access levels should not remove core privacy and security needs from the most basic or accessible product options.

Nonprofit organizations are providing critical community services. When selling to nonprofits, prioritize the needs and use cases of their work over making the sale.

- Nonprofit organizations should always maintain a way to turn off and stop using particular AI products in the event an AI product begins to harm the organization or its community. Examples of harm may include chatbots providing incorrect information, generated images not respectfully reflecting the community, or prediction tools generating biased or consistently inaccurate predictions.

Prioritize community outcomes

Relationships between nonprofits and technology or service providers should always prioritize the nonprofit's outcome and community impact.

- Providers should take care that sales goals do not incentivize the selling of unnecessary services. Similarly, the sales process should also support representatives in spending the necessary energy helping nonprofits get what they need.
- Together, nonprofits and providers should consider the long-term sustainability of the solution, including whether the organization can sustain the system's cost or effort over time.

Price equitably

Most nonprofit organizations have less access to capital than for-profit organizations. Even within the nonprofit sector, there is a significant difference in the ability to pay. Products and services should be accessible to as many organizations as possible.

- Providers not working exclusively with the nonprofit sector should offer nonprofit pricing. Nonprofit pricing, license comparisons, and key delivery tiers should be clearly and publicly visible on the website, not up to each nonprofit's negotiating power.
- Different sizes and types of nonprofits have differing levels of access to capital. Consider creative but transparent pricing models to make the offered services accessible to as wide an array of organizations as possible.
- Pricing tiers or access levels should not remove core privacy and security needs from the most basic or accessible product options. Nonprofits should not have to pay extra to ensure their constituent data is protected.
- Consider that the same systemic oppression impacts nonprofit institutions as individuals. Organizations led by Black, Indigenous, disabled, queer, and other people with marginalized experiences are likely to have less funding, which should factor into pricing. Consider how pricing can help alleviate systemic racism, sexism, and other forms of systemic oppression.

Understand that nonprofit business processes are frequently nuanced, complex, and require a specialized understanding of their relationship to mission-driven outcomes. Technology deployments to nonprofits can fail if driven from a purely commercial perspective.

Understand the provider's customer base

The broad customer base of providers should be available to organizations. Organizations should make decisions accordingly.

- Providers should be honest and transparent about the extent and nature of their experience in the nonprofit sector. The general types and size of nonprofit clients should be disclosed. For-profit and nonprofit experiences are different.
- Providers should be transparent when products were designed specifically for the nonprofit sector, and when nonprofits will need to adapt products intended for other industries.

Be intentional with pro bono services

Pro bono services should be used carefully. Free products and services can be a powerful way to make solutions accessible to nonprofits. However, pro-bono projects risk unsustainable or incomplete solutions.

- Clearly state (but do not inflate) the value of pro bono services so that nonprofits can decide if the approach is sustainable over time.
- Be transparent about the pro bono approach and staffing. Inform organizations if new or inexperienced staff are slated to work on pro bono projects. Be clear if the pro bono services do not match the same full-cost service.
- Understand that nonprofit business processes are frequently nuanced, complex, and require a specialized understanding of their relationship to mission-driven outcomes. Technology deployments to nonprofits can fail if driven from a purely commercial perspective. As much as possible, use a project process and staffing that is identical between pro-bono and paid services.

Nonprofit expertise

Staffing and project team membership

Ensure that projects are staffed with individuals who can support nonprofit organizations properly.

- Do not staff nonprofit projects with inexperienced employees to save money, or with employees who will require first learning standard nonprofit business processes and practices.
- Make implementation teams diverse. These teams can better partner with nonprofits in creating change.
- If you market your organization as having nonprofit expertise, staff projects with those experts.
- Be transparent about the expertise of team members.

Build nonprofit-specific expertise and pricing

The nonprofit sector is unique and not a lesser version of the for-profit sector. Providing products and services in the nonprofit sector requires specific skills.

- Providers who consider nonprofits a target sector should invest in building the necessary nonprofit expertise across their internal teams. Be transparent if this experience is not in-house.
- Providers without the necessary nonprofit experience should discount their services or pay nonprofit clients to compensate organizations for their time educating the provider. A nonprofit should not pay both for implementation and educating the software provider.
- Recognize that the nonprofit sector is not a monolith. Different organizations, mission areas, and constituencies will have different data and technology requirements, priorities, and support needs.

Implementation processes

Embrace nonprofit diversity

Many nonprofits do not have full-time IT staff. Many nonprofits also have organizational cultures that prioritize values and community involvement that make processes slower than a corporate technology timeline. Cultural humility is required when supporting organizations with cultures that differ from corporate norms.

- Do not assume technology expertise or staff. Avoid jargon and check for understanding without assumptions or judgment. Plan to educate staff as a core function of the implementation work with nonprofits.
- Use inclusive practices for meeting facilitation and project management to ensure all voices are heard.

Support intentional nonprofit project management

Nonprofit organizations often do not have technology-specific implementation expertise. Providers should support nonprofits through careful project management practices.

Nonprofits should be able to extract all their data or reports without additional fees.

- Projects should include a budget for project management. This budget should include internal staff time to ensure the demand for those staff is fair.
- Providers should make clear when nonprofits are blocking further action.
- Providers should establish clear responsibilities for action, decision-making, approval, and communication for each task.
- Nonprofits should regularly be provided with an accounting of hours and costs against the project timeline.
- Changes that will impact the timeline or cost of the project should be documented.

Nonprofit technology projects will not succeed if only the technology team and senior leadership are involved.

Implement with the staff and community

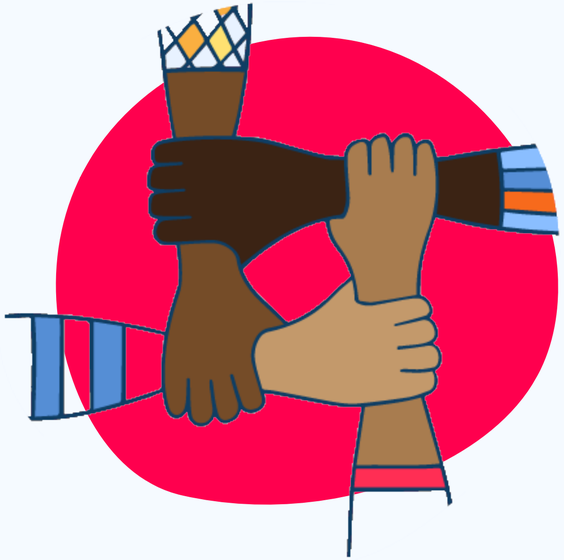
Nonprofit technology projects will not succeed if only the technology team and senior leadership are involved. Projects should include staff from all areas of the organization. Projects with a constituent-facing component (through direct access or data collection) should consist of community members.

- Providers should require and support the formation of representative project teams within nonprofits.
- Care should be taken to address power dynamics in project decision-making between leadership and staff, and between staff and community members.
- Constituents should actively participate in the data review and testing for AI products.
- Constituents (and other non-staff participants) should be compensated at a comparable rate to nonprofit staff.

Treat projects as an ongoing process

Technology projects are living processes. Organizations and providers should assume that changes and support will be necessary after implementation. Organizations should be provided as many opportunities as possible to review and provide feedback during implementation.

- Providers and organizations should plan and budget for the support and changes inevitably needed after every go-live. Providers should be transparent about the ongoing costs and support needs of a given solution.
- For larger projects, an implementation should be divided into multiple phases. This allows for frequent and early reviews of the project. Based on these reviews, organizations should be permitted to adjust the scope or end the project and pay only costs to date.



Product focus

Prioritize accessibility

Providers should make their products, materials, and training inclusive and accessible.

- Make products and training materials accessible to individuals with auditory, visual, physical, and other disabilities. Prioritizing accessibility creates a world that is easier for everyone to thrive in — regardless of disability.
- Meeting facilitation, training, and other interactions should consider different learning styles and neurodiversity.
- Open-source solutions should be provided with detailed documentation and, when possible, community or paid support options. Many organizations that could benefit from open-source solutions do not have developers on staff.
- Constituent-facing tools should consider access to technology, the internet, and other wealth-driven supports.

Own product impact

Providers should take some responsibility for building tools that provide the best chance of positive community impact. Ensure tools encourage equitable nonprofit program delivery.

- Include the community and build with equity in mind when designing products and creating default workflows.
- Add features that support the equity standards laid out for nonprofit organizations in this document.
- Consider and work to limit the harmful uses of products, including surveillance, misuse of personal data, or aiding harmful institutions' actions.
- Consider the bias of AI deployed in products.
- Be transparent about the product's social, environmental, and sector impacts, including energy consumption, outsourced or third-party contributions to development or training on the systems or data, and roadmaps or plans for both investment and mitigation of impacts.
- Use product language that is accessible to more than economically comfortable white people. Avoid coded racist language like "black and white" or "master/slave."

Simplify data access and sharing

A nonprofit's data belongs to it and its constituents. Vendors should make that data easily accessible so nonprofits can share it with funders or other organizations when necessary.

- Nonprofits should be able to extract all their data or reports without additional fees. Where they exist, nonprofits should be given access to APIs and other tools for data portability without extra cost.
- Providers should have clear policies about data storage with current nonprofit customers and how that data is destroyed after nonprofits are no longer customers. These policies should be provided and discussed with nonprofits before they begin their use of the technologies. If these policies change, providers should proactively notify nonprofits of the change – and discuss the implications in detail with nonprofits.
- Providers should make data export and sharing options flexible enough that nonprofits can easily share data with and between other nonprofits and with funders.

Prioritize security

Nonprofit organizations often must meet security needs far more complex than their organization size would suggest. Providers should provide tools and training to support the security of nonprofit data.

- Providers handling (or providing tools that will handle) sensitive data should pay for and publish external audits of their products and data-handling practices regularly. The depth of these audits should depend on the size of the vendor and the data's sensitivity.
- Providers primarily serving nonprofits with constituents concerned about government surveillance should consider zero-trust security to ensure community members' safety.
- Providers should not charge extra fees for necessary security precautions like two-factor authentication or SAML integration.
- Providers should incorporate security training into their general curriculum (as it relates to their systems).
- Providers should be transparent about the geographic region their data will be stored. When vendors have a server presence in multiple regions, nonprofits should be able to select the region of the servers that store their data.
- Providers should have clear and documented processes for reporting security breaches to nonprofit organizations in a timely manner.

Find the latest version of the Equity Guide for Nonprofit Technology, along with companion resources and templates.

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