ACROSS THE TABLE

BUSINESS CONSULTING

INDUSTRY STACK 08 · NONPROFIT

The Nonprofit Stack

Eight systems for donor, program, impact and the next campaign — built for a budget that has to justify itself.

Knowledge Article I08

AI Stack Series · acrossthetable.biz

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WHO THIS IS FOR

You run or help run a nonprofit. You raise money, you deliver a program, you report on impact, and you do all of it with fewer people than the work needs.

This guide is for the executive director or operations lead who knows the organization is leaking donors and does not have the time or the budget to go looking for enterprise software.

Nearly everything here has a free tier or nonprofit pricing. That is not a coincidence — this sector is well served if you know where to look.

START WITH THE WORK, NOT WITH THE APPS

These are not twenty lists of AI apps. Each stack starts with the jobs a particular business performs, then matches AI and conventional software to those jobs. Treat it as a menu to evaluate, not a shopping list.

For this kind of business the work runs in one line, start to finish:

> **THE PATH THE WORK TAKES**
> Donor → Program → Engagement → Impact → Funding

Broken into the steps a customer actually moves through:

- Donor
- Campaign
- Donation
- CRM
- Program
- Impact
- Report
- Next campaign

Read that line left to right. Someone gives, the money funds a program, the program produces results, the results bring the next gift. That loop is the organization.

The break in that loop, in almost every small nonprofit, is retention. It costs far more to find a new donor than to keep one, and most organizations put almost all their effort into the finding.

THE STACK, PIECE BY PIECE

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Every tool below is matched to one of those steps. You do not need all of them, and you should not buy all of them at once. Read the “What it is” column first and find the step where your business is losing the most time or money.

Tool	The step it covers	What it is	Price
Bloomerang	Donor management	Donor records, giving history and retention analytics.	Per month by records.
Mailchimp	Communications	Email campaigns, automations and audiences.	Free tier; per month by contacts.
Canva	Fundraising materials	Design everything else — decks, social posts, flyers, simple video — with AI help built in.	Free tier; Pro per user/month.
ChatGPT / Claude	Drafting and research	OpenAI’s general assistant — writing, analysis, research and, with Agent mode, multi-step work.	Free tier; paid plans per user/month.
Asana	Programs and projects	Projects, tasks and workloads with AI summaries.	Free tier; paid per user/month.
QuickBooks	Financial management	The small-business accounting standard — books, invoicing, reporting.	Per month by plan.
Google Workspace	Collaboration	Gmail, Drive, Docs, Meet and admin controls.	Per user/month.
Zapier	Automation	Connects thousands of apps and AI models with no code.	Free tier; paid by task volume.

Where two names share a row with a slash between them, they do the same job and you pick one, not both. The description shows the first of the two.

Ask every vendor on this list about nonprofit pricing before you pay list price. Many have a discount or a grant program and will not mention it unless asked.

What to watch out for in each one

None of these are reasons not to buy. They are the things owners tell us they wish they had known first.

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- Bloomerang — Priced by donor count.
- Mailchimp — Costs climb with list size.
- Canva — Easy to drift off-brand. Lock a brand kit.
- ChatGPT — It sounds confident when it’s wrong. Check anything that touches money, law or a customer.
- Claude — Same rule as any assistant: verify facts and never paste data you wouldn’t email.
- Asana — Structure only works if everyone updates it.
- QuickBooks — Only as clean as your categorization habits.
- Google Workspace — Admin controls need an owner.
- Zapier — Task-based pricing climbs fast once it works.

WHERE AI ACTUALLY FITS IN THIS BUSINESS

Grant research assistance, donor communications, impact-report drafting, volunteer coordination, campaign development, program analysis.

In plain terms, that means:

- Finding grant opportunities that match your actual programs, and drafting the first version of the narrative.
- Writing the thank-you and the update letter so every donor hears from you more than once a year.
- Turning program data into an impact report that a board member and a funder can both read.
- Drafting the volunteer schedule, the orientation material and the standard replies that nobody has time to write.
- Summarizing what worked in last year’s campaign so this year’s starts from evidence.

One caution specific to this sector: never let AI invent a number. Impact figures, beneficiary counts and outcomes are reported to funders and sometimes to regulators. AI drafts the sentence around the number; you supply the number.

WHAT TO SET UP FIRST

Do these in order. Finish one before you start the next. Most owners who try to do all of it in one month end up using none of it.

1. **Get every donor into one system** Spreadsheets lose people. A donor database with giving history is the single foundation of fundraising, and the retention reporting it gives you is the number that matters most.

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2. **Build the thank-you and the update into a routine** Automated, prompt, and personal enough to be believed. This is the highest-return fundraising work there is and it is almost free.
3. **Put the books in order** Nonprofit accounting has reporting requirements that a shoebox cannot meet, and clean books are a condition of most grants.
4. **Then add program and project tracking** Once the money side works, tracking what the program actually did gives you the impact data that funds the next round.
5. **Automate the handoffs last** Connecting the donation form to the donor record to the thank-you email removes the manual step that gets dropped when things get busy.

WHAT IT COSTS TO START

Donor management is typically priced by how many records you hold, which means your cost rises with your list whether or not those people still give. Clean the list annually; it is both cheaper and more honest reporting.

Email and design tools are priced per month or per contact, and most have nonprofit rates. Collaboration suites are often free or heavily discounted for qualifying organizations — if you are paying full price for one, check.

The real cost in a nonprofit stack is staff time, not licences. Choose the tool your actual team will use, not the one with the best feature list, because an unused system in a thinly staffed organization is a total loss.

The price column in the table above tells you how each one charges — per user, per location, per contact, or a percentage of every sale — not what you will pay. That is deliberate. The charging model is what decides whether a tool stays affordable as you grow, and it is the part that does not change every quarter. Get the current dollar figure from the vendor's own pricing page before you budget.

THE RULES UNDERNEATH ALL OF IT

Legal · Privacy · Data protection · Security · Compliance · Records · Audit · Risk · Human oversight — underneath every one of the twenty stacks, not an afterthought.

Donor data is personal data and donors are unusually sensitive about it. Know who can export your donor list and what happens to it when a staff member or a contractor leaves.

Never put beneficiary information — especially about children, health, or vulnerable circumstances — into a general AI tool. If your program serves vulnerable people, their details stay inside systems chosen for that purpose.

Grant reporting is a contractual obligation. What you report must be traceable to a record, not to a well-written paragraph.

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Your charitable registration carries rules about solicitation and acknowledgment that vary by state. Automation does not change what the letter has to say.

MISTAKES THAT COST THE MOST

- Keeping donors in a spreadsheet and discovering at year end that you cannot see who lapsed.
- Spending the whole budget on acquisition while retention quietly falls.
- Paying list price for software that has a nonprofit rate.
- Letting an AI draft fill in an impact number that nobody can trace to a record.
- Buying a system nobody on a three-person team has time to learn.

THE CEO DECISION

- What is your donor retention rate? If you do not know it, that is the first thing to fix.
- How long after a gift does a donor hear from a human being?
- Can you produce the evidence behind every number in your last impact report?
- Which tools are you paying full price for that have a nonprofit rate?
- If your development person left next month, where would the relationships live?

YOUR QUICK REVIEW

- ☐ Every donor and gift is in one system with giving history.
- ☐ Thank-you messages go out promptly and automatically.
- ☐ I know my retention rate and watch it.
- ☐ Impact numbers trace back to program records.
- ☐ I have asked every vendor about nonprofit pricing.

ADDITIONAL RESOURCES

Tool	Where to find it	What it is for
Bloomerang	bloomerang.co	Nonprofits focused on keeping donors, not just finding them.
Mailchimp	mailchimp.com	General small-business email marketing.
Canva	www.canva.com	Small teams with no designer who still need consistent-looking work.

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Tool	Where to find it	What it is for
ChatGPT / Claude	chatgpt.com / claude.ai	Your default thinking partner when you want one tool that does most jobs well.
Asana	asana.com	Teams who need visible ownership and dates.
QuickBooks	quickbooks.intuit.com	Clean books your accountant already knows how to read.
Google Workspace	workspace.google.com	Running the business day to day.
Zapier	zapier.com	Your first automations, and the widest app coverage.
Across the Table AI Assessment	acrossthetable.biz/#assessment	Fifteen minutes. Tells you which job to start with before you buy anything.
The Scaling Edge	acrossthetablebiz.substack.com	Weekly newsletter for owners without a business background.

Go deeper on the pieces

Each of these is a full guide comparing the three tools that do that job:

- Ask and reason — acrossthetable.biz/knowledge-articles/ask-and-reason/ (covers ChatGPT, Claude)
- Make the deck — acrossthetable.biz/knowledge-articles/make-the-deck/ (covers Canva)
- Connect the tools — acrossthetable.biz/knowledge-articles/connect-the-tools/ (covers Zapier)
- Run the work — acrossthetable.biz/knowledge-articles/run-the-work/ (covers Asana)
- Manage the money — acrossthetable.biz/knowledge-articles/manage-the-money/ (covers QuickBooks)

CONTINUE LEARNING

The Across the Table AI Assessment takes fifteen minutes and starts from the work your organization performs.

The guides above cover the individual tools for each job in plain language.

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