

# Operations & Workflows: A Practical Guide for Nonprofit Leaders

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## 1. Executive Summary

In our first two papers, we introduced the concept of digital infrastructure and walked through its first two pillars: digital presence and communications & outreach. We covered how nonprofits show up online, and how they talk to the people they need to reach.

This paper covers the third pillar: operations and workflows. How your organization actually runs day to day — the administrative and operational functions that keep the mission moving.

Here is something worth saying directly: most nonprofits are already doing all of this. You have a way to manage volunteers. You have some process for event registration. You accept donations somehow. The question this paper addresses is not whether you're doing it — it's whether it's digital, consistent, and owned by the organization rather than held together by one person's memory, a personal spreadsheet, or a tool that only one staff member knows how to use.

**The technical case first:** Operational infrastructure in a nonprofit context is built on a set of tools and workflows: your volunteer management system, your event registration process, your scheduling and booking tools, your payment and donation processing, your intake forms, and your document management. When these pieces are in place, documented, and owned by the organization, your operations become more consistent, more scalable, and less vulnerable to staff transitions. When they're not, every staff departure takes institutional knowledge with it — and the mission pays the price.

**The business case:** Funders and partners increasingly evaluate organizational capacity, not just program quality. A nonprofit that can demonstrate clean operational systems — consistent intake processes, documented workflows, reliable payment processing — signals that it is ready to grow. A nonprofit whose operations depend on institutional memory signals fragility, regardless of how strong its mission is.

This paper gives you the foundation to build operational infrastructure that holds up — one that works even when your team changes.

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## 2. The Stakes — What's Actually at Risk

You already know the operational weight of running a nonprofit. The volunteer who didn't show up because the reminder fell through the cracks. The donor whose payment failed and never came back. The program participant who slipped through because intake was handled differently by two different staff members. The grant report that was late because the data lived in three places and no one owned pulling it together.

What we can add is the technical picture of what's underneath those moments — and what specifically makes operational breakdowns so costly for mission-driven organizations.

One thing worth naming directly: operational risk in nonprofits is largely invisible until it isn't. A workflow that depends on one person works fine — until that person leaves. A volunteer database that lives in a spreadsheet on someone's desktop works fine — until the laptop dies. A donation process that's been "good enough" works fine — until a major donor tries to give and can't.

The signal is usually an incident, not a warning. And by the time the incident happens, the cost — in donor relationships, volunteer trust, program continuity, or staff time — is already real.

There is also a less obvious risk: organizational fragility during leadership transitions. When operational knowledge lives in people rather than systems, every staff departure is a partial data loss. The incoming person doesn't just need to learn the role — they need to reconstruct the processes. That reconstruction takes time the mission doesn't have, and it introduces inconsistency at exactly the moment when consistency matters most.

A nonprofit with documented, digital, owned operational systems is resilient in a way that a nonprofit running on institutional memory simply is not.

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## 3. What "Operations & Workflows" Actually Means

### It's Not Just Administration

When most nonprofit leaders hear "operations," they think paperwork. Compliance. The back-office stuff that exists to support the real work. That framing undersells what's actually at stake.

Operations is the connective tissue of your organization. It is how volunteers get coordinated, how participants get served, how donors get receipts, how programs get documented, and how your team stays aligned. When it works well, it's invisible — people show up, things happen, nothing falls through the cracks. When it doesn't, every staff member feels it, and eventually your community does too.

A complete operational infrastructure has six components. Understanding all of them is the difference between an organization that runs and an organization that scales.

### 1. Volunteer Management

Volunteers are often a nonprofit's most valuable and most underutilized resource. The operational challenge is not finding volunteers — it's keeping track of them, communicating with them consistently, and deploying them effectively.

A functional volunteer management system tracks:

- Who your volunteers are and how to reach them
- Their availability, skills, and roles

- Their hours — for your records, for grant reporting, and for their own recognition
- Their history with your organization

This does not require expensive software. A well-maintained spreadsheet with clear ownership is a starting point. A dedicated volunteer management platform — Better Impact, VolunteerHub, or even a structured Google Sheet — is a step up. What matters is that the information lives in a system the organization owns, not in one coordinator's inbox or memory.

Assigned ownership is non-negotiable here. Someone is responsible for keeping the volunteer list current, sending communications, and tracking hours. When that responsibility is diffuse, volunteers feel it — in missed communications, inconsistent experiences, and the quiet sense that the organization doesn't quite have it together.

## 2. Event and Program Registration

How people sign up for what you offer is an operational system. Whether it's a workshop, a training, a program cohort, or a community event — the registration process is often the first operational touchpoint a participant has with your organization.

A functional registration process:

- Is digital and accessible — someone can sign up from their phone at 10pm
- Collects the information you actually need, consistently, every time
- Confirms the registration automatically so the person knows they're in
- Routes the information somewhere the right staff member can see it

A registration process that lives in an email thread, a paper sign-up sheet, or a Google Form that routes to an unmonitored inbox is not a system — it is a workaround. Workarounds work until they don't, and when they fail, it's usually at the worst possible moment.

Tools worth knowing: Eventbrite for public events, JotForm or Google Forms for internal intake, and most email platforms (Mailchimp, Constant Contact) have basic event registration built in.

## 3. Appointment and Scheduling

Many nonprofits offer one-on-one services — consultations, case management sessions, tutoring, counseling. The scheduling process for these appointments is operational infrastructure that most organizations handle manually long after they should have automated it.

A manual scheduling process — phone tag, email back-and-forth, a shared calendar that only one person can update — costs staff time and introduces friction for the people you're trying to serve. Someone who has to send three emails to book an appointment with your organization may quietly decide not to bother.

A booking link — Calendly, Acuity Scheduling, or Google Calendar's appointment booking feature — solves this entirely. The person chooses a time that works for them. The appointment appears on the staff member's calendar automatically. A confirmation email goes out. A reminder goes out 24 hours before.

This is one of the highest-return, lowest-effort operational improvements available to nonprofits. It saves staff time, reduces no-shows, and removes friction for the people you serve.

## 4. Payments and Donations

The ability to accept money online is foundational operational infrastructure. For nonprofits, this means two things: accepting donations and processing payments for programs, memberships, or services.

A functional payment and donation setup:

- Works on mobile — a significant portion of donors give from their phones
- Generates an automatic receipt with the information needed for tax purposes
- Routes funds to an account the organization controls
- Is tested regularly — a broken donation button is invisible to you and costly in missed gifts

For donation processing, **Zeffy** is worth highlighting specifically. It is the only major donation platform that charges nonprofits zero fees — not just a discounted rate, but genuinely zero. Donors have the option to leave a tip to support Zeffy, but it is never required. For small nonprofits watching every dollar, this matters.

For general payment processing, Stripe and Square are the standard options — both have nonprofit rates and integrate with most website platforms.

One operational note: whoever sets up your payment processing should not be the only person with access to it. Payment credentials, account access, and reconciliation responsibility should be documented and shared with at least one other person in leadership. This is both a financial control and an operational continuity measure.

## 5. Intake Forms

Every time your organization collects information from a program participant, a volunteer applicant, a client, or a new contact — that is an intake process. Most nonprofits have multiple intake processes. Few have them designed intentionally.

A well-designed intake form:

- Collects only what you actually need — not everything you might someday want
- Uses consistent field names and formats so the data is usable later
- Routes to a place the right person can access — not a personal inbox
- Has a defined owner who reviews submissions on a regular schedule

The most common intake failure is not bad forms — it is forms that route nowhere useful. A Google Form that sends submissions to an inbox no one checks, or a paper form that gets scanned and emailed to whoever happens to be in the office, is not intake infrastructure. It is data that will be lost.

Tools: Google Forms and JotForm are both free and functional for most nonprofit intake needs. For organizations that need to connect intake data to a CRM or donor database, Typeform and JotForm both offer integrations that reduce manual data entry.

## 6. Document Management

Contracts, grant agreements, program reports, board minutes, financial records, staff policies — every nonprofit generates documents that need to be stored, organized, and findable by the right people.

The baseline for document management is deceptively simple: every important document lives in one place the organization owns, with a folder structure that someone other than the person who created it can navigate.

That standard is not met by documents that live on a personal laptop, in a personal Google Drive, or in an email thread. When the person who holds those documents leaves — voluntarily or not — the organization loses access to its own records.

A functional document management system:

- Lives in a shared, organization-owned drive — Google Drive or Microsoft SharePoint are the standard options for nonprofits
- Has a folder structure that is documented and followed consistently

- Has defined access permissions — not everyone needs access to everything
- Has an owner responsible for maintaining the structure and ensuring documents are filed correctly

For organizations storing sensitive information — client records, financial data, personnel files — access controls are not optional. Knowing who can see what is both a legal responsibility and an operational one.

## 7. Assigned Ownership

As with every pillar in this framework, the most important operational question is not which tools you use — it is who owns each process.

Every operational function needs a named owner:

- Who manages the volunteer list and sends communications?
- Who monitors event registrations and follows up with participants?
- Who has access to payment processing and reconciles transactions?
- Who reviews intake form submissions and by when?
- Who is responsible for the document drive and its structure?

These owners can be volunteers, part-time staff, or board members. What they cannot be is undefined. When operational ownership is unclear, processes degrade quietly — and the degradation usually becomes visible at the worst possible moment.

## 4. The Technical Reality — One Layer Deeper

### The Hidden Cost of Disconnected Tools

Most nonprofits don't have an operations problem — they have a fragmentation problem. The volunteer list lives in a spreadsheet. Event registrations come in through a Google Form. Donation receipts go out from a personal Gmail. Program intake is on paper. Documents are split across three different drives and one person's desktop.

Each of these tools works in isolation. The problem is that they don't talk to each other, which means information has to be moved manually — copied from one place to another, re-entered, reformatted. That manual work is not just inefficient. It introduces errors, creates delays, and depends on someone remembering to do it.

The technical term for this is **data silos** — isolated systems that hold information the rest of the organization can't easily access. For small nonprofits, some degree of fragmentation is inevitable and acceptable. But there is a line between manageable fragmentation and operational fragility, and most nonprofits cross it without realizing.

The practical test is simple: if the person who runs a given operational process were unavailable tomorrow, how long would it take someone else to pick it up? If the answer is "days" or "we're not sure," the process is too dependent on individual knowledge and not enough on documented, accessible systems.

### Payment Processing — What You Need to Know

Online payment processing involves more moving pieces than most nonprofit leaders realize, and the gaps tend to surface at the worst possible times.

**Merchant accounts and payment processors** are not the same thing. A payment processor (Stripe, Square, PayPal) handles the transaction. A merchant account is the bank account that receives the funds.

Most modern processors combine both functions, but it is worth confirming that the funds from your donation or payment processing flow to an account the organization controls — not a personal account, and not an account only one person has access to.

**PCI compliance** is the set of security standards that govern how payment card data is handled. If you are using a reputable payment processor (Stripe, Square, Zeffy), they handle PCI compliance on your behalf — you don't need to manage it directly. What you do need to ensure is that you are not storing credit card numbers yourself, in any form. If your intake form asks for a card number and stores it in a spreadsheet, that is both a security risk and a compliance violation.

**Recurring donations** are operationally different from one-time gifts. A donor who sets up a monthly recurring gift is trusting your payment infrastructure to process their card reliably every month, send them a receipt, and notify them if anything fails. If your payment processor doesn't support recurring giving, or if no one is monitoring for failed charges, you are quietly losing revenue and donor trust simultaneously.

**Zeffy** deserves a specific mention here. It is the only major donation platform that charges nonprofits zero processing fees. Most platforms charge 2-3% per transaction — on \$50,000 in annual donations, that is \$1,000-1,500 in fees. Zeffy's model asks donors to optionally tip to support the platform, but the nonprofit pays nothing. For small nonprofits, this is a meaningful operational and financial decision.

## **Data Silos and Integration — When Tools Need to Talk**

When your operational tools are fragmented, information has to be moved manually between them. Someone exports a list from Eventbrite and pastes it into Mailchimp. Someone copies donation data from Stripe into a spreadsheet. Someone re-enters intake form responses into a CRM.

This manual data movement is where errors happen. A contact whose email is mistyped in the transfer doesn't get the follow-up. A donor whose gift is not logged correctly doesn't get acknowledged. A program participant whose intake data is not transferred doesn't get the services they need.

Integration tools — most notably **Zapier** and **Make** (formerly Integromat) — solve this by connecting your tools directly. When someone fills out a JotForm intake form, their information can be automatically added to your Mailchimp list, logged in your Google Sheet, and trigger a confirmation email — without anyone touching it manually.

These integrations don't require a developer. Zapier's free tier supports basic connections between hundreds of tools. The investment is setup time — usually a few hours for a simple workflow — and the return is a process that runs correctly every time, without human intervention.

This is the entry point for automation in the Operations & Workflows pillar. Not replacing human judgment — replacing manual data transfer.

## **Document Security and Access Controls**

Document management sounds straightforward until something goes wrong. A staff member leaves and their personal Google Drive — where half the organization's grant agreements live — becomes inaccessible. A board member accidentally deletes a folder. A volunteer's shared access to a sensitive client file creates a compliance issue.

A few technical principles worth knowing:

**Organization-owned drives are non-negotiable.** Google Drive for Nonprofits and Microsoft 365 Nonprofit both offer free or deeply discounted tiers for qualifying organizations. Documents stored in these drives belong to the organization, not to any individual's personal account. When someone leaves, their access is removed — but the documents stay.

**Access permissions should follow the principle of least privilege** — people should have access to what they need for their role, and nothing more. Most Google Drive and SharePoint implementations give everyone access to everything by default. That is not a document management strategy. It is a liability.

**Version control matters for key documents.** Grant proposals, board policies, program curricula — documents that go through multiple revisions should be managed with version history enabled, so you can see what changed and when. Both Google Drive and SharePoint maintain version history automatically. What matters is that people know it exists and use it instead of saving "final\_v3\_ACTUAL\_FINAL.docx."

## **A Real-World Illustration**

Consider what happens when an Executive Director departs unexpectedly — a scenario more common in the nonprofit sector than most leaders like to think about.

If operational systems are documented and owned by the organization: the incoming interim has a clear picture of every process, every tool, every password, every vendor relationship. The transition is disruptive but manageable.

If operational systems live in the departing ED's memory, their personal devices, and their individual accounts: the organization spends the first weeks of a leadership transition reconstructing basic operational knowledge — at exactly the moment when it should be focused on continuity and stability.

We have seen this play out directly in Portland's nonprofit community. A well-established arts organization navigating a leadership transition discovered that critical vendor relationships, domain registrations, and digital accounts were tied to a departing staff member's personal credentials. The resulting gap — in institutional knowledge, in access, in documented process — cost the organization weeks of staff time and created vulnerabilities that an outside party was able to exploit.

The lesson is not that leadership transitions are bad. They are inevitable. The lesson is that operational infrastructure is what determines whether a transition is a bump or a crisis.

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## **5. A Path Forward**

### **Starting From Where You Are**

Most nonprofits we talk to have operational systems of some kind already in place — a spreadsheet that tracks volunteers, an email thread that serves as registration, a Venmo account that receives occasional donations. That is not a failure. It is a starting point.

The goal here is not to overhaul everything at once. Operational change is disruptive, and disruption has a cost. The goal is to identify the gaps that are most likely hurting you — in staff time, in donor relationships, in program continuity — and address those first. Build incrementally toward infrastructure that holds up without heroics.

### **Principle 1: Document Before You Automate**

The most common operational mistake nonprofits make is trying to automate a process they haven't documented yet. Automation does not fix a broken process — it accelerates it.

Before connecting any tools or setting up any workflows, write down how the process currently works. Who does what, in what order, using which tools. Even a simple bulleted list is enough. That documentation

serves two purposes: it reveals where the process actually breaks down, and it gives you a clear picture of what you're trying to automate.

A process that is documented but manual is recoverable. A process that is automated but undocumented is a black box — and black boxes fail in ways that are hard to diagnose.

### **Principle 2: Move Off Personal Accounts and Devices**

If any of your operational systems — your volunteer list, your donation processing, your document storage, your event registrations — are tied to a personal email account, a personal device, or a personal subscription, that is the first thing to fix.

This is not about trust. It is about continuity. Personal accounts end when people leave. Personal devices break. Personal subscriptions lapse when someone forgets to pay the bill.

Move your operational tools to organization-owned accounts. Google Workspace for Nonprofits and Microsoft 365 Nonprofit are both free or nearly free for qualifying organizations. The migration takes time. The alternative — an operational crisis during a staff transition — takes more.

### **Principle 3: Assign Ownership Before Adding Tools**

A new volunteer management platform does not solve a volunteer management problem that is fundamentally about ownership. If no one is responsible for keeping the volunteer list current, a better tool just means a better-organized mess.

Before adding any new operational tool:

- Name the person responsible for it
- Define what they are responsible for and how often
- Document that responsibility somewhere that survives a staff transition

Tools are only as good as the people who own them.

### **Principle 4: Start With the Highest-Risk Process**

Every organization has one operational process that, if it failed completely tomorrow, would cause the most damage. For most nonprofits, that process is one of three things: donation processing, volunteer coordination, or program intake.

Identify yours. Audit it honestly — is it digital? Is it documented? Does it live in an organization-owned system? Does someone own it clearly?

Fix that one first. The return on getting your highest-risk process right is almost always higher than spreading effort across multiple lower-risk improvements simultaneously.

### **Principle 5: Build for the Person Who Comes After You**

Every operational decision you make should be tested against one question: could someone who has never done this job before pick this up in a week?

If the answer is no — because the process lives in your head, your personal inbox, or your laptop — that is an operational risk. Not because you're going anywhere, but because organizations that depend on specific people for operational continuity are fragile in ways that eventually matter.

Build systems that outlast individuals. Document processes as if you're writing them for someone who will join next year and has never met you. That discipline is what separates organizations that survive leadership

transitions from organizations that are defined by them.

## A Practical Starting Checklist

### Volunteer Management

- Volunteer information lives in a centralized, organization-owned system
- Someone is named as responsible for the volunteer list and communications
- Volunteer hours are tracked consistently and accessible for grant reporting

### Event and Program Registration

- Registration is digital and accessible from a mobile device
- Confirmations go out automatically when someone registers
- Registration data routes to a monitored, organization-owned location

### Scheduling

- Appointment booking uses a digital tool (Calendly, Acuity, Google Booking)
- Confirmations and reminders go out automatically
- Calendar access is shared with more than one person

### Payments and Donations

- Online donation is functional and tested on mobile
- Donation receipts go out automatically with tax documentation
- Payment processing account is owned by the organization, not an individual
- At least two people have access to payment processing

### Intake Forms

- Intake forms are digital and collect consistent information
- Submissions route to an organization-owned, monitored location
- Someone is named as responsible for reviewing submissions regularly

### Document Management

- All important documents live in an organization-owned shared drive
- Folder structure is documented and followed consistently
- Access permissions reflect roles — not everyone has access to everything
- Key documents have version history enabled

### Ownership and Continuity

- Every operational process has a named owner
- Operational processes are documented in writing, not just in memory
- A new staff member could pick up any process within one week using existing documentation

## One Last Thought

Operations is not the glamorous part of running a nonprofit. It does not appear in your mission statement or your annual report. But it is the infrastructure that makes everything else possible — the reliable, invisible foundation that lets your programs run, your volunteers show up, your donors give, and your team stay focused on the work that matters.

The nonprofits that scale are not always the ones with the best programs. They are the ones whose operations are solid enough to support growth when it comes. Infrastructure built before you need it is an asset. Infrastructure built in response to a crisis is expensive and incomplete.

Your mission deserves the foundation to sustain it.

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*This white paper was produced by Raíz Digital, a Portland-based digital consultancy serving nonprofits and mission-driven small businesses. Raíz Digital was founded by Richard Flores, a 24-year Intel engineer who now applies that technical experience to amplifying the missions of community-focused and mission-driven organizations.*

**Technology that amplifies your mission.**

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*This is Paper 3 in Raíz Digital's Digital Infrastructure for Nonprofits series. Paper 1 covered Digital Presence. Paper 2 covered Communications & Outreach. The next paper will cover Data & Analytics — followed by an anchor paper that ties the full framework together.*

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