

2025-2026

# TOOLS and TECH GUIDE

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# A LOOK BACK

State Voices was established in 2008 with a mission to provide strategic, data-driven support to 501c3 civic engagement organizations working at the state and local levels. Data staff were employed by ISSI- a not-for-profit organization with the mission to provide data management, list building, and coalition-building advice and services to a variety of advocacy groups and charities. Data work grew under ISSI, operating a Civic Engagement VAN and later dissolving ISSI and forming Voices Vote Now (VVN). In 2014, State Voices own Data Department was established. At that time, it was a department of one. By 2016, State Voices' Data Department boasted three full-time staff members, and it was rapidly growing! In 2017, the Strategic Partnerships Department and Data Department created the State Voices Data Certification Program (DCP). To this day, it is one of the most popular resources State Voices offers, providing training to help organizers, advocates, activists, and data practitioners grow in their ability to use data and VAN to foster positive change in their communities.

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When Alexis Anderson-Reed joined State Voices as the Executive Director in 2018, it was clear that she was ready to chart a new strategic direction: it was time to radically reimagine our Network's power for a more equitable future. Acutely tuned into the needs of the movement, Alexis gave the authority to make contract negotiations and choose tools and vendors to the people who work with these tools the most. And that was the beginning of the Tools & Tech Guide.

State Voices' Data Department, already composed of some familiar faces at that time, spent a long time researching the best options for the entire network. The research was so extensive it made sense to create a repository of institutional knowledge. After all, State Voices provides not only infrastructure and resources but also a wealth of information and best practices backed up by years of experience and research. In 2020, the first edition of the Tools & Tech Guide was released; back then, it was called Nonprofit Tools and Tech Guide. It was born from an internal need for a repository of digital tools and knowledge and has continued to evolve. First, we wanted to make strong recommendations to our State Tables and partners on products that we trusted. We included a nonprofit discount piece so that people could know they were getting the best rate possible. State Voices' leadership knew that many nonprofits faced struggles with funding, and providing a resource that is sensitive to that was a priority. The Guide continued to be released annually until 2023, when the release cycle switched to bi-annual.

From day one, the work of State Voices has been centered in data and technology. Every aspect of the work State Voices does is in some way connected to and informed by State Voices' Data Department. State Voices' founders understood that strategic, impactful work had to be data-driven. The biggest investment State Voices made in data was providing a suite of tools and support for those tools to our entire network of organizations and prioritizing placing a Data staffer at every state affiliate in the network. State Voices has always been committed to providing strategic data-driven support, but as State Voices' and state affiliate Data departments have grown, we've had the opportunity to expand not only access to tools and support but also increase our role as innovators and leaders in building community-owned tools. Just in the recent couple of years, State Voices participated in over 200 tech demos. As trusted leaders in nonprofit



civic engagement, our network of over 1,000 organizations looks to us for guidance and support. We've always followed the same principles and sought innovative ways to engage voters and manage our work.

For example, during the 2020 pandemic, we were looking to continue civic engagement that kept people safe. No one was knocking doors and people could not get together to phonebank. Spoke, an open-source platform, was already in use by some State Tables via a private instance, while texting vendors remained prohibitively expensive. After internal deliberation, a decision to establish a texting platform was made. By November 2020, State Voices sent out 30 million messages through the movement-owned platform we have established called [Dispatch](#). The key was establishing a platform for people who share our values and support the platform with movement engineering while providing a distributed model of organizing texting.

Today, State Voices is a network of 24 State Tables, 8 Emerging States, and nearly 1k on-the-ground partners across 50 states. Together, we fight for a world where every vote is counted, every voice is heard, and every need is met. We're collectively building a healthy democracy and political power with Black, Indigenous, Latinx, Asian American and Pacific Islander, and all people of color (BIPOC).

We can further liberation by making sure technology, tools, training, and resources are in the hands of people experiencing oppression in society. State Voices provides innovative data infrastructure, training, support, and capacity to our network and movement community. This includes training and support on new tools that connect communities with accurate information on how they can make a difference in their neighborhood and lives.

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# HOW TO USE THIS GUIDE

This guide is intended as an introductory resource for nonprofit organizations exploring digital technology. While we acknowledge the research and planning that went into creating each edition of the Guide, it is essential to emphasize that it should not replace your own independent research.

We have aimed to keep each review to a single page to provide a clear and informative overview of each tool/vendor. Our evaluations of these tools were based on various factors, including, but not limited to, those outlined below.

## Integration Capacity with Movement Technology

One integration that has become a standard in civic engagement technology is NGP VAN. NGP VAN is the leading technology provider to progressive campaigns and organizations, offering an integrated platform that combines fundraising, compliance, field, organizing, digital products, and voter file maintenance. VAN and its canvassing app MiniVAN are legacy products in the progressive movement that nearly every stakeholder has used or is currently using. This integration enables the direct transfer of data between VAN and other tools, making it an essential consideration for organizations using VAN.

There are three types of VAN integration:

- **Push VAN Integration:** Results can only be pushed from the tool being used back into VAN.
- **Pull VAN Integration:** Data can only be pulled from VAN and into the tool being used.
- **Push/Pull VAN Integration:** Data can be both pulled from VAN and into the tool, and results from the tool can be pushed back into VAN.

VAN API integrations, in any combination, offer several benefits, including:

- **Reduced Manual Loading:** Eliminates the need for manual data loading from one tool into another.
- **Streamlined Data Sharing:** Eliminates the need to send data and responses back and forth via email or other online methods.

## API

An API is a set of applications, functions, and/or procedures that provide programmers with the structure for communication between applications. This enables tools to automatically transfer data from one to another, facilitating layered contacts, reporting, and data integrity. With open APIs, organizations can easily build and share capacity with the larger progressive community, enabling more efficient and seamless data operations. This allows for the creation of layered contacts, reporting, and data integrity, ultimately enabling organizations to innovate and move forward in their civic engagement efforts. Open APIs enable different organizations, developers, and third-party vendors to collaborate effectively. This collaborative approach can lead to the creation of new services and applications that build on existing technologies. API integrations



allow organizations to be more participatory in innovating the tools space instead of relying on a set of legacy tools.

As new technologies continue to emerge, it is essential to have APIs that enable these tools to communicate with each other seamlessly. While legacy tools like NGP VAN remain a cornerstone of civic engagement technology, the emergence of newer technologies has proven challenging for existing integrations. Nonprofit organizations frequently have unique technological needs that might not necessarily be at the front of the development queue for the largest vendors. Open APIs allow developers and the movement to create customized solutions that cater to specific user needs and preferences, leading to more user-centric industry-specific innovations.

When selecting a tool, investing in one that integrates with your civic engagement data systems is essential. This ensures that state data staff do not have to send data via email or other online methods, and you do not have to worry about sending data back after a vendor program.

*Note: When inquiring about integrations supported by a vendor, clarifying which data fields can be pushed/pulled is crucial. Not all integrations are created equal, and understanding the specific capabilities of each integration is essential for effective data sharing and informed decision-making.*



## Other Considerations

- **Web-based vs native app:** When evaluating a tool, it's essential to consider whether it's offered via a website or app, as this can be a significant factor in its usability.
  - Web-based barriers: Typically require an internet connection to function, which may limit their use in areas with poor connectivity or during outages. Some apps also rely solely on internet access, which can be a drawback.
  - Native app barriers: Volunteers or paid staff may be hesitant to download an app onto their personal devices, citing privacy concerns or storage limitations. This can lead to additional costs for organizations, as they may need to purchase dedicated phones or tablets to ensure that users can access the tool. This added expense can be a significant consideration, especially for smaller organizations or those with limited budgets.
- **Longevity of the vendor:** Technology is fluid, tools and vendors can come and go while the communities that need your work remain. It is important to ask yourself:
  - How long has this company existed, and is it used by any other trusted organizations?
  - Will this company still exist in a year or more?
  - Is it likely to be acquired by another company?
  - How can I retrieve my data if the company ceases operations?
- **Pricing models:** Before entering into a contract, be sure you understand the pricing model.
  - Various tools have different pricing models. Some can have a tiered structure based on the volume of use, while others can have a “pay as you go” agreement where you pay each time you use the service.
  - Remember to inquire about 501c3 nonprofit discounts.
- **Language accessibility:** It is necessary to ensure equal access to tools for individuals whose primary language is not English.
  - Information, features (including interface), and training should be easily translated into other languages, especially languages most used in your communities.

## OpenSource vs Non-OpenSource

Open-source technology and tools provide access to their underlying source code.

- **Benefits**
  - Allows organizations to modify the source code to suit their specific needs. The ability to customize the tool can be beneficial.
- **Tradeoffs**
  - Often requires specialized skills, which may not be readily available within your team. If you lack in-house expertise, you'll need to hire a developer, adding significant costs to your budget.
  - Often less developed and refined, which could require substantial work from your staff or a hired developer to tailor the product to meet your organization's requirements. This can lead to increased workload and potential delays.

- Support for the tool could disappear at any time, and then bug fixes or updates would need to be done by your organization.

## **Voter File**

When using a tool that requires voter file data, you should inform your state table or Tools for All team members, so they can provide the necessary paperwork to ensure your vendor is approved and has authority per State Voices' contract with its voter file vendor. Not all vendors have the authority or ability to use data from the State Voices VAN.

## **Data Ownership**

This is a crucial factor in ensuring that your data is secure and not shared or sold to third parties. Before entering into an agreement with any vendor, it is essential to read the agreement carefully, have it vetted by a lawyer, and pay close attention to any details regarding data sharing or security.

## **State Voices' Commitment to Impartial Evaluation**

State Voices remains committed to evaluating digital tools fairly and impartially. Our review process involves a standardized assessment of key characteristics, features, and vendor information, incorporating input from industry experts.

## **Organizational Values and Practices**

We consider factors beyond technical specifications, including reputation, mission alignment, and ethical business practices. At State Voices, we prioritize partnering with vendors who align with our core values of social justice, representation, inclusivity, and progressive principles. These aspects are crucial for the successful implementation of technological solutions, as they must be developed, delivered, and utilized in an equitable and ethical manner, prioritizing the well-being of the communities they serve. This can only be achieved through human oversight and people-centric strategies of use.

## **Demo Accounts**

When evaluating tools, the State Voices team not only solicits a live demo but also requests demo/test accounts whenever possible. Many vendors offer free trials, sandboxes, and other options for administrators to "test-drive" the tool. We highly encourage you to ask every vendor you are seriously evaluating for such an account to give you hands-on experience with the technology you are considering adopting.

# AI: IMPORTANCE OF HUMAN OVERSIGHT

Human oversight is a cornerstone of State Voices’ approach to Artificial Intelligence (AI), Machine Learning (ML), and Large Language Models (LLM) as well as any other digital tech. As AI technology becomes increasingly integrated into various tools and devices, it is essential to exercise caution and carefully evaluate the potential risks associated with its use. In our last edition of the [Tools & Tech Guide](#), we discussed frameworks such as OWASP AI Security and Privacy Guide and Google’s Secure AI Framework, which provide valuable resources for addressing AI data privacy and security concerns.

AI, ML, and LLM solutions offer numerous benefits, including improved efficiency, personalization, and innovation. However, they also pose significant risks to data privacy, as they often rely on collecting, processing, and sharing large amounts of sensitive information. When selecting a digital vendor, obtaining clear answers regarding their AI policy and usage is crucial.

Using data in AI systems in unethical ways can cause actual harm to communities. For example, in the United States, a system technology used for the assessment of future risk of re-offending among defendants was found to discriminate against members of the black community. [Similarly](#), in the United Kingdom, an algorithm used for custodial decisions was discovered to discriminate against individuals with lower incomes. Moreover, [research has found](#) that it is not easy to apply existing anti-discrimination rules to choices made by machines, strengthening the arguments for the necessity of human oversight and practicing ethical data use.

To help facilitate AI usage screening, we have developed this sample checklist, which contains questions you can ask any digital vendor before using their tool.

## AI Vendor Questions

**Privacy by design and by default-** this should be a feature in any AI system. The questions you can ask to check for this are:

- **How much data does the AI tool collect?** Ideally, data collection should be minimized and only collected and used for training or testing machine learning models if such collection and use is legal and consistent with the expectations of the people whose data is collected. You should be able to understand exactly what data is collected for what purposes. Remember that AI systems, when not utilized ethically, pose significant potential harm to those who are not users but who may be harmed by inferred data, community surveillance, and privacy violations



- **What is this data used for?** You want to make sure your data won't be used to train the tool for third-party use. Anticipated data collection should be determined to be strictly necessary to the identified goals and should be minimized as much as possible

**Data collection and use-case scope limits-** data collection should be limited in scope, with specific, narrow identified goals, to avoid "mission creep." Clear timelines for data retention should be established, with data deleted as soon as possible following legal or policy-based limitations. Essentially, you should not simply use data collected for one purpose as a training dataset to train AI for other purposes. The questions you can ask to check for this are:

- **How long do you retain the data that you collect?** Specifically, try to find out how long the data is retained after you cancel your contract or are no longer using the tool
- **Is this AI used in any other cases/systems?** Try to find out if this specific variant of automation is used outside of the scope of our work, making sure the tool that might use your data to train won't be used anywhere else and the specific variant trained on your data is not available to third parties

**Risk identification and mitigation-** Vendors that collect, use, share, or store sensitive data should proactively identify harms and risks and mitigate them, and respond appropriately to identified risks. Appropriate responses include determining not to process data when the privacy risks outweigh the benefits or implementing measures to mitigate acceptable risks. Appropriate responses do not include sharing or transferring the privacy risks to users via notice or consent requests where users could not reasonably be expected to understand the risks without further support. The questions you can ask to check for this are:

- **How is your data stored?** Encrypted at rest and in transit
- **Who can access this data?** Check for permission levels, only need-to-know people should have access, and the data should not be used to train the tool for third parties. Vendors should receive written consent before sharing data with other entities.
- **Do you have privacy and security documentation I can view?** Vendors should be open to sharing their privacy and security documentation so you can gain a full understanding of specific policies regarding privacy and security and avoid transferring privacy risks to users.
- **What are your incident response and disaster recovery procedures?** As sensitive data might be stored on vendors' platforms, with this question, you are investigating if there are servers the vendor maintains that store data, and if so, what are the procedures in case of natural disaster, malicious attacks, a security breach of the property where servers are located, etc.



# DATA PRIVACY

Accurate data is a cornerstone of informed decision-making. It allows you to know who your stakeholders are, what issues are important to them, how and when you engage with donors and activists, and much more. From donor management to volunteer engagement, you interact with various pieces of technology that collect, store, and analyze your organization's data. Increasingly, data becomes one of your organization's most valuable assets. Therefore, the ethical use of data should be at the cornerstone of digital planning to ensure accountability and enhance the effectiveness of the programs. Regardless of the tools you choose, it's important to continuously monitor changes to Terms of Service and Privacy Policies, as this is a rapidly evolving technology" with "as technology evolves rapidly.

## Compliance and Regulations

In recent years, there has been a surge in data privacy regulations, reflecting a global shift towards prioritizing individual privacy and security. These regulations empower individuals by giving them greater control over their personal data while ensuring that organizations handle sensitive information responsibly. Three prominent pieces of legislation are worth discussing in greater detail.

### The General Data Protection Regulation (GDPR)

Enforced since May 2018, the [GDPR](#) is one of the most stringent data privacy laws globally. It regulates how personal data of individuals in the EU can be collected, stored, and processed. The GDPR is widely considered a gold standard for data privacy regulations, and here is why:

- **Consent:** Requires explicit consent for data processing.
- **Right to be forgotten:** Grants individuals the right to access their data and request deletion.
- **Broader Scope:** GDPR applies to all organizations that operate within the EU or process the personal data of EU residents, making it a more comprehensive regulation.
- **Stricter Requirements:** The GDPR has stricter data protection requirements, including the need for explicit consent, data minimization, and robust security measures.
- **Higher Fines:** GDPR imposes higher fines for non-compliance, up to €20 million or 4% of global turnover, making it a more effective deterrent against data breaches.

Within the US, there currently is no federal legislation that would be as robust as GDPR. However, there are promising steps in the right direction.



## California Consumer Privacy Act

Effective from January 2020, the CCPA enhances privacy rights and consumer protection for residents of California. While CCPA is not as comprehensive as GDPR, it's still a significant step towards protecting consumer privacy, and here's why:

- **Consumer-Centric:** CCPA focuses on giving consumers more control over their personal data,
  - The right to opt out of data sales
  - Right to request the deletion of personal information.
- **Business-Friendly:** CCPA provides businesses with more flexibility in implementing data protection measures, allowing for a more gradual transition to compliance.

These regulations reflect a growing global emphasis on data privacy and protection, aiming to empower individuals to hold organizations accountable for their data practices. As data privacy concerns continue to evolve, more comprehensive regulations are likely to emerge in various jurisdictions. To be at the forefront of data protection, we recommend following the most robust and comprehensive data regulations, like those mentioned above.

## Utah Consumer Privacy Act

Put into effect on December 31, 2023, the UCPA aims to protect the rights of consumers whose data is processed by businesses in Utah. UCPA is less restrictive towards businesses than similar statewide consumer and privacy laws in California, Colorado, and Virginia. One difference between the GDPR is that it focuses on a consumer's right to opt in, while the UCPA offers consumers the right to opt-out, and they must be offered the option to do so. Below are key takeaways of the UCPA:

- **Utahn consumers have the right to:**
  - Access to request and delete personal data
  - Opt out of the collection and use of personal data for specific purposes (i.e., targeted advertising)
  - Obtain a copy of their personal data in a format that is feasible, practicable, readily usable, and portable
- **Exceptions**
  - Employee data is not protected under the UCPA.
  - Certain businesses are exempt based on volume/revenue thresholds, as well as type of work (such as higher education institutions, nonprofits, government organizations, organizations covered under HIPAA, financial institutions, etc).

# TOOLS OVERVIEW

According to the [Commons Social Change Library](#), distributed organizing is a people-powered approach that blends mobilizing with organizing, ceding some level of decision-making from a central coordination team to supporters, creating opportunities and support for them to step into leading groups to achieve centrally prescribed goals. The rise of distributed organizing undeniably allowed the movement to engage supporters and activists across geographical boundaries and cultural groups. Distributed organizing is often horizontal and more activist-led than the traditional centralized organizing model. While it still relies on a central coordinating group for strategy, goals, and such, a lot of the efforts on the ground are done by people who are not launching canvasses or phonebanks from one central location, instead relying on a network across multiple geographies. This type of organizing calls for a toolset that allows for a common mission and is flexible enough for individuals to perform actions on their own time. You can scale up distributed programs quickly. Thus, selecting tools that allow you to take advantage of this is essential.

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When reviewing the current digital movement tools ecosystem, it becomes clear that vendors have caught up with this trend, which was greatly exacerbated by the pandemic. Most digital civic engagement tools, productivity, communication, tasking, and other types of tools have features that allow remote work, distributed organizing, and real-time digital collaboration. While some might not have explicitly set out to create a distributed tool, all have functionality that team members, activists, and supporters can use across the US on various devices, asynchronously or simultaneously, to reach a common goal.

## State of the Movement

In the face of adversity, there are people-powered victories emerging across the country if you know where to look. Our communities voted for many things in 2024: for quality public education for our kids, for better wages, for power over our health care decisions. Our people voted for our freedoms, our families, and our futures. By coming together time and again, we prove the strength and resilience of our movement.

Every voter counts. We're committed to ensuring historically underrepresented and unheard communities can exercise their right to vote. Our network contacted over 66 million voters in 2024 and made a total of over 179.3 million contacts using a wide variety of methods, including text messages, phone calls, mail, and in-person canvassing. We helped collect over 841,000 voter registration applications.

State Tables organized around ballot initiatives and measures on topics like reproductive freedom and autonomy, education, workers' rights, and redistricting. This organizing led to wins on reproductive freedom in Missouri, Montana, Nevada, and New York; raising the minimum wage in Missouri; paid sick leave in Missouri and Nebraska; public schools in Nebraska and Kentucky; and unionizing in Massachusetts!

To help push for a historic early voting turnout, our state affiliates in Georgia, Michigan, Minnesota, Nevada, North Carolina, Ohio, Pennsylvania, New Mexico, and Wisconsin mobilized over 30

Early Vote Rallies and Parties to the Polls to encourage civic participation with music, food, and community building.

As leaders in the Election Protection coalition, we helped address nearly 60,000 calls from voters asking questions about their ballot or the voting process throughout the 2024 election cycle.

We trained nearly 1,600 people in the movement this year. This includes over 300 data practitioners, storytellers, and operations and fundraising professionals through the Changemakers Skills Camp (co-led by State Voices and The Movement Cooperative in March of 2024) and over 90 organizers through the New Deal for Organizing.

How did we do this? Through leveraging our incredible tool stack! At State Voices, our network of more than 40 full-time data practitioners consistently use data and technology to uplift oppressed communities, inform and highlight stories from these communities, and enhance overall civic engagement. In 2024, State Voices provided tools to our affiliates, lowering costs and increasing data capacity to help organizations mobilize and build.

State Voices acquired Spoke from MoveOn, enabling us to grow our Dispatch tool — our nonpartisan texting platform where organizers and advocates can run SMS campaigns to engage their bases. We also rolled out new digital canvassing platforms like OpenField. To deepen our investment in emerging leaders, we partnered with 8 other movement technology organizations to train over 300 people in data, development, operations, and communications at Changemaker Skills Camp. We also got to hear from members of our data practitioner community about the impact of civic technology on their work.





“““ Being a part of the State Voices data community continues to be such a value add for the Kentucky Table. As a state with only one data staffer, this community allows me the opportunity to trouble shoot with my peers, absorb best practices, and learn new skills. I’m especially thankful for the tools they provide us, such as OpenField, Mobilize, and Action Network, and for the opportunity to attend Changemakers Skill Camp because they’ve helped up our game tremendously and helped me think outside of the box.

—**Kolby**, Data Manager with Kentucky Civic Engagement Table

“““ I have had a great year. On the skill development side I was given the opportunity to use a new tool in Openfield which was a great learning experience and their support staff were amazing in answering questions. The skills camp helped me kick start some specific skills especially SQL that I have been building on ever since. One of my favorite parts of the data team is how willing other data folks from across the nation are willing to jump in and help each other learn and grow.

—**Dennis**, Data Manager with Missouri Organizing and Voter Engagement Collaborative

“““ As a data newbie, State Voices has provided me invaluable professional development and support this year. The SV leadership work group, access to DataCamp, troubleshooting with Catalist, set up with a fabulous mentor, and even advocating for good training and guidance when VAN makes changes (such as MiniVAN Auto-commit in September), have all made my learning curve more manageable and even enjoyable.

—**Alma**, Data Associate with Washington Community Alliance

“““ Being connected to the SV National data team has allowed me to grow and support our state partners in more innovative ways each year. Whether it’s the community building and sharing of expertise that happens on our weekly calls and working groups or the constant stream of support and updates for Dispatch, Openfield, etc I always feel like my feedback is heard and I am constantly supported by the national data team.

—**Robert**, Data Director with Civic Tennessee



**State Voices partnered with multiple mission-aligned organizations this year. We are proud of working with the best and most dedicated movement tech and data enthusiasts in the space. Every vendor we work with is an essential part of our network. Our members know there is always a real person on the other side of your support ticket. We are excited to share some of the feedback that our vendor partners have provided.**

**“““** Collaborating with the State Voices Network this year has been a transformative experience. Their unwavering commitment to fostering a healthy, multiracial democracy is truly inspiring. By partnering with their 24 State Tables and over 1,200 grassroots organizations, we’ve witnessed firsthand the power of collective action in amplifying underrepresented voices and advancing civic engagement.

One of the standout aspects of our collaboration has been the emphasis on the human element. Beyond the technological tools and data support, the genuine relationships we’ve built with the tables and their members have been invaluable. It’s a partnership that goes beyond transactions, rooted deeply in a shared vision for a just and equitable society.

**—Matt, Director of Sales, Nonprofits, Advocacy & Politics at GetThru**

**“““** It was a pleasure working with Tools for All partners in Texas and with Strategic Partnerships at State Voices National to ensure success during this election season, they made 30,000 attempts and talked to 8,500 people [using Openfield]! The OpenField team has gained valuable insights from this group and is inspired by their dedication to uplifting their communities. We are eager to see their continued growth and impact for the next year!”

**—Ashley, Client Success Analyst with OpenField**

**“““** Catalist has been honored to work with State Voices since its inception in 2009. Their commitment to reach a wide range of communities across 48 states in hyper-local geographies is admirable. State Voices has also been a pioneer when it comes to adapting new tools, such as CTA PAD, OpenField, and the Catalist-to-Meta Direct Integration. Thank you, State Voices, for all of your valuable work!”

**—Michael, Chief Executive Officer at Catalist**

## State Voices Adoption of MoveOn's Spoke Technology

Since 2017 Spoke has been an open-source, peer-to-peer texting platform maintained by MoveOn. Programmers, activists and volunteers who believe in economic and racial justice collaborate on more than politics but also the technology, like texting around those politics.

In 2023 MoveOn transferred the administration of the Spoke open-source technology to State Voices. State Voices hosts one of the nation's largest Spoke deployments. In October of 2023, State Voices held its first Hack-a-thon with MoveOn building a community of movement technology engineering for Spoke. The three day hack-a-thon hosted engineers from across the nation centering movement owned technology.

In 2024, State Voices invested in building next generation functionality in the Spoke platform. The Spoke platform has expanded bandwidth peer-to-peer text messaging with the adoption of toll-free and short-code phone numbers, and the foundations in integrate with other civic engagement technologies easier with updates to its node.js backbone. The Progressive Coders Network has been a hub for Spoke development since version 2.0 and remains a core dedicated space for technologists to contribute to movement technology.

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# STATE VOICES TOOL STACK

Based on our research, the following vendors currently best fit our needs and may best fit the needs of our tables and partner organizations, but we still recommend that each organization do its own research to find the best fit for them.

To the extent that a certain number of these tools are available through State Voices, we remind partner organizations that the terms and conditions of usage of the tool, services, or software, including pricing, are specified in an agreement between State Voices and partner organization which a partner organization must sign and we recommend that you refer to such agreement for accurate information regarding such terms and conditions of use. Please contact [datateam@statevoices.org](mailto:datateam@statevoices.org) for more details and the relevant agreement for any tool, services, or software used through State Voices.

## CRM: Action Network

State Voices, like a lot of our partners, is in a unique digital space where we not only need to manage donor, stakeholder, and volunteer information and communication but also need to conduct meaningful civic engagement work and successfully track it. It is for that reason we have multiple tools in our tool stack that one might qualify as a CRM. For example, the State Voices Communications Department uses Action Network for some of our forms and petitions. We provide the subscription, so State Tables and many State Tables use it as their email CRM. Additionally, the State Voices Data Department utilizes CTA PAD as a data warehouse and a data analytics platform. On top of those two tools, State Voices provides access to and utilizes NGP VAN and OpenField for in-depth voter file management, universe creation, and list building.

**Website:** [actionnetwork.org](http://actionnetwork.org)

**Purpose:** A digital tool and a CRM to organize people to take online and offline actions, send mass messages to recruit and mobilize new activists, and raise funds to fuel important work. Powering you to inspire action. Mobilize communities, raise money, and engage supporters with tools built for teams just like yours.

**Cost:** [actionnetwork.org/partnerships](http://actionnetwork.org/partnerships)

**Contact:** Marvin Steele, Director of Partnerships, [marvin@actionnetwork.org](mailto:marvin@actionnetwork.org)

**Created:** The Action Network toolset launched in September 2013 with a focus on building progressive power. It was more than just a toolset; it was a new way to build technology for the progressive movement. ActionNetwork built on their nonprofit model, creating a new model of cooperative development.

### Pros:

- Flexible Campaign Types: Email, Calls, Letters, Petitions, and Fundraising
- Robust In-person and virtual event management
- Petitions: Accessible, flexible tools to help you launch petitions with a few clicks. Easy, detailed reporting.



- Ladders: Engagement workflows to increase activist involvement over time
- Fundraising: Collect one-time or recurring donations, customize donation options, upsell your donors, or let them pick their donation amount.
- Networks: Networks are structures for federated organizations, organizations with local chapters, field campaigns, and similar structures. Groups within a network share data according to their place in the hierarchy.

**Integrations:** ActBlue, Action Builder, Ballot Ready, Catalist, Campaign Deputy, Salesforce, HubSpot, New/Mode, SQL Mirror, and Zapier.

**Support:**

- Evergreen weekly training to help optimize all tool features
- Support hours are 9 am – 5 pm ET

**Security:** [actionnetwork.org/privacy](https://actionnetwork.org/privacy)

**Similar Tools:** ActBlue, Anedot, EveryAction, NGP, Callhub

## Voter File: Catalist

**Website:** [catalist.us/](https://catalist.us/)

**Purpose:** Catalist has been the data utility powering the progressive community for over eighteen years. They acquire, standardize, and match data on 352 million distinct individual person records (including 215 million registered voters) from all fifty states and DC to serve as a single reliable data source. Catalist also provides voting age persons (VAPs), phone numbers, and absentee and early vote (AVEV) data to help organize, target persuasive messaging, engage activists, drive an issue agenda, and register or mobilize voters. They provide the data backbone for progressive civic engagement and advocacy efforts, most major labor unions, and produce “What Happened”, the flagship post-election analysis.

**Cost:** Available to State Voices Affiliates and Partners, Tools for All members. Cost varies.

**Contact:** <https://catalist.us/contact-us/> or your Account Executive

**Created:** 2006

**Pros:**

- Catalist has worked with State Voices since the very beginning and is proud to consider State Voices a close partner in the progressive space
- Primarily servicing the nonprofit and labor union progressive industry, committed to not selling data for commercial use; only serves progressive causes
- Owned by a collaborative trust of civic-minded, progressive organizations that cannot be bought or sold
- Support is top-notch
- They offer a variety of models that help refine contact universes

**Integrations:** NGP VAN, Civis Analytics, Community Tech Alliance (CTA), OpenField, Universe, and more. Catalist also offers a LiveRamp integration that connects proprietary data to online identities for digital advertisements with 300+ destinations.

**Security:** Catalist maintains its own Secure File Transfer Protocol for data transfer and has regular SOC 2 certification.



**Support:** Through each organization's account rep, or through State Voices if an affiliate or partner.

**Similar Vendors:** TargetSmart, HaystaqDNA, PDI, ClarityLabs

## Voter File: TargetSmart

**Website:** <https://targetsmart.com>

**Purpose:** TargetSmart specializes in providing data-driven solutions that empower clients to understand, engage, and activate their key stakeholders. Their mission is to empower forward-thinking campaigns, companies, governments, labor unions, and nonprofits to harness the full power of data, technology, and strategy to win their battles and build a better future.

**Cost:** [sales@targetsmart.com](mailto:sales@targetsmart.com)

**Contact:** [sales@targetsmart.com](mailto:sales@targetsmart.com)

**Created:** 2004

### Pros:

- Long-term data vendor and partner to the progressive community, providing voter data to allies and progressive labor unions
- Host of progressive modeling and data science for civic engagement
- Various data solutions, including path to victory and post-election analysis, digital media buying, custom modeling, and fundraising.
- Research solutions, including polling, focus groups, and online panels
- Offers a Media Buying Platform that allows you to directly onboard TargetSmart data to a variety of platforms with a variety of cost savings.
- Offers a best-in-class matching tool (SmartMatch) to match and onboard to digital platforms on demand

**Integrations:** NGP VAN, Google Data Studio, Civis, Amazon Web Services

**Support:** Through State Voices, if an affiliate or partner. Otherwise, inquire with the vendor.

**Similar Tools:** Catalist, HaystaqDNA, PDI, ClarityLabs

## Event Management: Mobilize

**Website:** <https://www.bonterra.tech.com/mobilize>

**Purpose:** Hub for event & volunteer management, volunteer recruitment, and online actions. Connects mission-driven organizations and supporters.

**Cost:** Varies depending on the number of dashboards and signups. Request pricing: <https://www.bonterra.tech.com/pricing/fundraising-and-engagement>

**Contact:** <https://www.bonterra.tech.com/request-a-demo>

**Created:** 2017, and acquired by EveryAction in 2020. In 2021, leading private equity advisory firm Apax Partners LLP acquired EveryAction. Mobilize is now part of Bonterra.

**Pros:**

- Setup and administration are simple
- Automatic and manual attendance tracking
- Automated confirm emails and SMS

**Support:** Email, HelpDesk <https://help.mobilize.us/en/articles/1915954-contact-mobilize-support>

**Integrations:** EveryAction, Phone2Action, VAN's My Voters, Zoom, Salesforce, ActBlue  
<https://help.mobilize.us/en/collections/5495342-integrations>

**Security:** [help.mobilize.us/en/articles/3614010-how-does-mobilize-secure-my-data](https://help.mobilize.us/en/articles/3614010-how-does-mobilize-secure-my-data)

**Support:** HelpDesk, Email, Chat,

**Similar Tools:** ControlShift, Eventbrite, Luma

**Texting: State Voices Dispatch**

**Website:** <https://dispatch.statevoices.org>

**Purpose:** Dispatch shares State Voices Spoke civic technology that offers person-to-person texting to large audiences in a short amount of time. Dispatch works on any web browser and provides movement organizations with a tool that integrates with State Voices' array of data technology.

**Services:**

- Person-to-Person SMS and MMS Text Messaging
  - Flat-rate messaging for Subscribers

| SMS     | MMS     |
|---------|---------|
| \$0.015 | \$0.025 |

- Broadband Messaging Services Short-Code and Toll-Free Phone Number Application and Service
  - On-Demand: Support for WhatsApp, ChatBots and Other Automated Services
- Services for both 501(c)3 and 501(c)4 movement groups

**Contact:** <https://dispatch.statevoices.org>

**Created:** Spoke is an open-source text-distribution tool for organizations to mobilize supporters and members into action. Spoke allows you to upload phone numbers, customize scripts, and assign volunteers to communicate with supporters while allowing organizations to manage the process. Spoke was created by Saikat Chakrabarti and Sheena Pakanati. On November 19th, 2023, the repo Spoke was transferred from MoveOn to State Voices.

**Pros:**

- Multiple Custom Responses for Campaigns, Texter Custom Canned Responses
- VAN API Support, Action Kit, and Mobilize Integrations

- Dynamic Assignment for Texters; Custom styling for campaigns; Multiple administrators for organizations;
- Heroku, Microsoft Azure, and AWS deployment integration support;
- Support for outgoing multimedia messages (MMS) and US Short Codes;
- Admin message review board for campaigns, texters, live campaign administration of scripts, messages, and conversations

**Support:** FreshDesk, Slack

**Security:** [Latest Spoke Release Notes](#)

**Similar Tools:** ThruText, Scale to Win

## Knocking and Phone Banking: OpenField

**Website:** <https://openfield.ai>

**Purpose:** Distributed, deep canvassing application that lets you knock on every door, on or off your list. Also allows for street canvassing and hand-dial phone banking.

**Cost:** Inquire with OpenField for individual pricing options; Schedule a Demo here: <https://openfield.ai/home/schedule-a-demo/>

**Contact:**

- **General inquiries:** [Info@openfield.ai](mailto:Info@openfield.ai)
- **State Voices partners and affiliates:** [datateam@statevoices.org](mailto:datateam@statevoices.org)

**Created:** 2018 by community organizers and data directors with decades of experience. Founder: Ari Trujillo John.

**Pros:**

- Automatic turf cutting based on Census blocks that takes into account best walking routes
- Check out more turf as you go; share it with a friend
- Canvassers can start knocking without a list and add people on the go matching to the national address file
- Capture and analyze open-ended responses; word cloud analysis
- Real-time data streaming back, including a GOAT and Leaderboard
- Offline mode- canvassers can download turf for canvassing in areas with bad cell service
- Cut lists using both voter file fields and canvasser-entered information

**Integrations:** My Voters (VAN), AWS S3, AWS Redshift, Community Tech Alliance PAD, BigQuery, Google Cloud Platform

**Support:**

- Troubleshooting hours: M-F 9 AM ET - 7 PM PT; response within 1 business day
- Support requests: [support@openfield.ai](mailto:support@openfield.ai)
- Knowledge Base: <https://openfieldhelp.zendesk.com/hc/en-us>

**Security:** Gardens can be requested from State Voices National Data Staff. Admin accounts are created and granted access once all data approvals are completed. End User permission is handled at the admin level. OpenField partitions data to end users by Conversation Code, which is managed by the Administrators. More information on security procedures can be found [here](#).

**Similar Tools:** MiniVan, My Voters, PDI

## Predictive Dialer: ThruTalk by GetThru

**Website:** <https://www.getthru.io/thrutalk-dialer>

**Purpose:** Predictive power dialer capable of making calls to both landlines and cell phones

**Cost:** Discounted rates for State Voices and affiliates are available- contact ThruTalk directly; General [Pricing](#) for others

**Contact:** New accounts: [sales@getthru.io](mailto:sales@getthru.io). Existing clients seeking technical support: [support@getthru.io](mailto:support@getthru.io)

**Created:** 2016

### Pros:

- WCAG (the web's standard for accessibility) compliance is partially implemented and more in development
- Intuitive script builder with VAN mapping capabilities
- Live monitoring for spam flagging
- Mobile friendly
- PDI integration
- Patch-Thru Calling
- No per-minute charges or other hidden fees, only per-dial.

**Integrations:** Bidirectional, real-time integrations with all iterations of NGPVAN. Support for nightly s3 export delivery and supports automated data integration with additional tools such as BigQuery via S3.

**Support:** Support hours can be found [here](#).

- Ticket Support: 9:00 am - 8:00 pm ET | Monday - Friday
- Live chat: 11:00 am - 7:00 pm ET | Monday - Friday
- Managed Calling hours: 9:00 am - 8:00 pm ET | Monday - Friday.
- Recorded and custom training sessions. Live chat, Email, Support tickets, [Knowledge Base](#); 15-minute average response time; average resolution- less than 2 hours.
  - Significantly expanded support hours during GOTV and high-traffic periods on a rolling basis.

**Security:** 10DLC, TCPA compliant, support for MFA in toolsets for clients. More information is available here: [Compliance](#), [Security](#). Options for Incident Response Plans, Security Standards, INFOSEC Policies, and Disaster Recovery Plans upon request. [Privacy Policy](#)

**Similar Tools:** CallHub, Impactive, Scale to Win

## Data Warehouse: CTA PAD

The increasing adoption of movement technology has underscored the importance of integrating these tools with existing data systems to facilitate effective civic engagement. As a national organization, State Voices relies on data services from the Community Tech Alliance (CTA) to store and analyze data from multiple civic engagement tools. [PAD](#), the Progressive Action Database, is CTA's core data warehouse and integrations platform. Think of PAD (yes, like where a frog lives) as the jumping-off point for all things data.

PAD can combine syncs from tools like GetThru, EveryAction, and OpenField, as well as voter data from Catalist and TargetSmart. CTA PAD is built on open-source tech and the powerful Google Cloud Platform. Rather than build from scratch, CTA leveraged already-existing tooling for PAD, leaning hard on Google's data infrastructure cloud offerings. They pull together tools and features to provide partners with tools to develop data pipelines and manage data infrastructure.

**Website:** <https://www.communitytechalliance.org>

**Purpose:** Consolidates all the data in one place, facilitating retrieval and secure storage without having to manage your own server. Includes Google BigQuery and Google Cloud Storage for navigating the platform, reading the available data, and moving data around.

**Cost:** Contact CTA

**Contact:** [hello@techallies.org](mailto:hello@techallies.org)

**Created:** 2021

**Pros:**

- Integrates with our most commonly used tools
- Consolidates all data in one place
- Support is very responsive (typically within the day)
- Lowers barriers to using APIs and programming

**Integrations:** Notably Google Drive, NGPVAN, Action Network, OpenField  
<https://www.communitytechalliance.org/data-syncs>

**Support:** Email, HelpDesk

**Security:** <https://www.communitytechalliance.org/security>

**Similar Tools:** Civis Analytics, Redshift, Google Firebase

## Data Visualisation: Google Looker Studio

**Why might you need this?**

*To create data visualizations, such as charts, graphs, or maps. Most people can comprehend data better in a visual format rather than just numbers on a spreadsheet.*

**Website:** <https://support.google.com/looker-studio>

**Purpose:** Visualize your data with reports and tables, share and collaborate on reports with your team, and connect to various data sources.

**Cost:** Free

- **Nonprofit discount:** Included in Google Account Suite

**Created:** 2016

**Pros:**

- It's free! Included in your Google Account Suite
- Great tool for beginning your visualization journey without having to pay anything
- Easily connect to your spreadsheets in Google Sheets
- Easily share reports, charts, and graphs with anyone
- Easily collaborate with anyone similar to Sheets, Docs, and Slides
- No SQL is necessary, but it can be used to enhance capabilities.

**Integrations:** Notably Google BigQuery, Sheets, more here: <https://lookerstudio.google.com/data>

**Support:** Help Center, Guides, Support Community

**Security:** <https://support.google.com/looker-studio/answer/General Data Protection Regulation>

**Similar Tools:** Tableau, Periscope

**Recommendation:** Any and all data staff should take full advantage of Google Looker Studio. It can be done on the fly, with no risks, low investment reporting, and visualization tool that helps to get the job done when you just need something simple and quick. It would still be recommended to use Tableau or other options for larger and more demanding visualization, however.

## Legislation Tracker: BillTrack50

**Website:** <https://www.billtrack50.com/>

**Purpose:** Legislative tracking, legislative information sharing, legislative scorecards

**Cost:** <https://www.billtrack50.com/info/pricing>. **State Table staff** can get an **upgraded subscription FOR FREE through the Policy Department** and also administer FREE user accounts to Table partners.

**Pros:**

- Registration is free for basic accounts;
- Full-text search engines for state and federal legislation
- Bill and Map Widgets available for reporting and analysis
- Alerts for new or changed bills matching user-saved searches, as well as committee hearings or floor votes
- Daily change summary email alerts for tracked legislation
- Stakeholder Pages allow easy sharing of legislation information to people without accounts
- Shareable Legislative Scorecards can be used to track how legislators vote
- AI-generated summaries for most legislation
- Allows export into Excel, CVS, and PDF reports
- API available

**Integrations:** Facebook, Twitter and Other Social Media platforms

**Support:** Help Center

**Similar Tools:** Fast Democracy, Enview, GovPredict, LegiScan, Plural, VRL tracker

## Content Creation: ChangeAgent

### Why might you need this?

Because you want a values-aligned generative AI platform. Change Agent is a ChatGPT alternative that helps progressive organizations ethically and effectively harness the power of generative AI. Change Agent is an intervention against Big Tech's AI chatbots that ban politics, perpetuate harmful biases, undermine workers, accelerate climate change, and have a mixed track record on data privacy.

**Website:** <https://thechange.ai/>

**Purpose:** Progressive organizations and coalitions use Change Agent to ethically harness the power of generative AI. Change Agent users report time-savings of up to 90% on tasks including content generation, strategy development, qualitative data analysis, translation, coding, AI-powered research, web scraping, digitizing written materials, and more.

**Cost:** \$100/month for Pro, \$200/month for Enterprise. Discounts are available to State Voices and TMC members/affiliates, as well as organizations with budgets under \$750K.

**Contact:** Aram Fischer, [aram@thechange.ai](mailto:aram@thechange.ai)

**Created:** Founded in 2024 as a pilot with Community Change Action.

### Pros:

- Built for and by progressive community with an emphasis on reducing harmful biases and sustaining shared values
- Leverages existing strategic and tactical documents and webpages to rapidly generate content in virtually any format
- Custom apps for streamlining common workflows
- Translation into 20+ languages
- Offers experts to facilitate generative AI adoption, including implementation, training, and developing bespoke solutions
- No training on or sharing of client data

**Support:** Regular office hours, [support center](#), and email support. Dedicated success managers available at additional cost.

**Integrations:** Google Drive and Wikipedia. Custom integrations for tools such as BigQuery available. Additional integrations planned for 2025.

**Security:** Change Agent can be Installed on private servers.

**Similar Tools:** Quiller.ai, ChatGPT, Claude, Gemini

## Additional Resources

**Democracy Works** assists Americans with registering and voting by providing comprehensive, reliable data and voting guidance in both English and Spanish. This includes requirements, instructions, key election changes and, ballot information. They also provide data on thousands of elections at every level, including key dates, deadlines, election notices, requirements, instructions, and state election office contact information. Additionally, their Elections API allows developers to request data, including voting guidance for a specific address, upcoming elections



for a specific state, key election dates and deadlines, sample ballot URLs, and contact information for local election offices. Their primary tools:

- **Voting Information Project** provides polling places, early vote, ballot drop-off locations, certain ballot information, and other election data easily accessible on a range of platforms, including search engines and social media sites: <https://www.votinginfoproject.org>.
- **Turbo Vote:** voters can opt into text or email notifications about upcoming elections. Reminders are available in English and Spanish





# ADDITIONAL RECOMMENDED MOVEMENT TOOLS

## Learning Management System

### *Why might you need this?*

A Learning Management System (LMS) is a web app that helps organize and share learning materials in a centralized place, such as courses and training, including issuing certificates. It lets students learn at their own pace, anytime and anywhere, and allows the instructor and organization that provides the materials to track progress and performance. An LMS also makes providing courses and training materials easy for a wide audience, saves money by reducing the need for in-person training, and provides an inclusive and accommodating learning experience. It's a useful tool for organizations that want to manage learning more efficiently.

## Moodle

**Website:** <https://moodle.com>

**Purpose:** Moodle LMS is a powerful, flexible, and widely adopted open-source learning management system designed to create engaging, accessible, and scalable online learning experiences. It serves educational institutions, nonprofit organizations, corporations, and government agencies, offering a flexible and customizable platform to support online, blended, and workplace learning.

**Cost:** \$130 - \$1,760 for Standard plans; customized platform varies

- Self-hosted: Free (open-source)
- MoodleCloud: Subscription-based hosting, off-the-shelf plans for beginners
- Moodle LMS: Premium hosting and support via Moodle and Moodle Certified Partners
- Moodle Workplace: Enterprise solutions via Moodle and Moodle Certified Partners

**Contact:** <https://moodle.com/contact/>

**Created:** Moodle was launched in 2002 by Martin Dougiamas and has since become the world's most widely used LMS, with millions of learners across 240+ countries.

### **Pros:**

- Highly flexible, supporting blended learning, competency-based education, self-paced training, and instructor-led courses.

- Open-source and community-driven with a global network of educators, administrators, developers, and organizations who use, contribute to, and support Moodle's open-source learning platform.
- Customizable and scalable with powerful course management, assessments, analytics, and thousands of plugins and integrations to meet diverse learning needs.
- Accessible with WCAG-compliant features and multilingual support.
- Secure and compliant adopting strong data protection, role-based permissions, and GDPR compliance.

#### Cons:

- Not as many integrations as similar tools
- Standard version limited to 750 users
- UI customization limited in Standard version

#### Integrations:

- Video Conferencing: BigBlueButton, Zoom, Microsoft Teams, Webex
- Productivity Tools: Google Workspace, Microsoft 365
- Content: H5P, SCORM, xAPI

**Security:** Moodle follows a “security by design” approach, with proactive security testing, GDPR compliance, role-based access controls, and secure data encryption. It is backed by a global security community and supports industry standards like SOC 2 Type 2 and TX-RAMP.

**Support:** Moodle offers multiple support options: self-hosted and MoodleCloud users can rely on a global open-source community, while organizations can access expert assistance through Moodle and Moodle Certified Partners.

**Similar Tools:** Litmos, Google Classroom, Docebo

## Canvassing: Grassroots Unwired

**Website:** <https://www.grassrootsunwired.com/>

**Purpose:** A mobile canvassing solution with unique features that allow you to get so much more than just survey responses. Supports door-to-door canvassing, event-based organizing, advocacy, and fundraising. Real-time tracking and accountability tools and full offline functionality.

**Cost:** Starting at \$4 per canvasser per day. Volume price breaks and other custom pricing is available. Lease of phones and tablets is available.

**Contact:** Russ Oster: [russ@grassrootsunwired.com](mailto:russ@grassrootsunwired.com)

**Created:** 2012

#### Pros:

- Capture photos and signatures within the app
- Send P2P texts from the app to voters while in the field
- Send real-time emails back to voters and to 3rd party targets post-survey
- Tools specifically built for vote tripling, signature gathering, voter registration
- Designed for accessibility, including multi-language support, and text-to-speech

**Support:** Live Phone support 9 am to 9 pm EST, 7 days a week. After-hours support is available via Slack, text, and email.

**Integrations:** NGPVAN, Blackbaud, AWS, ROI Solutions, Microsoft Azure, Upland Software, ActionKit, Engaging Networks, Classy.

**Security:** SOC2 and PCI compliant.

**Similar Tools:** MiniVan

## Content Creation: ChorusAI

**Website:** <https://www.chorusai.co/>

**Purpose:** Chorus AI's goal is to reduce the time spent on routine tasks and turn time-consuming projects from half-days into half-hours. They bring together all of the context, data, and information needed to write compelling content in one platform, making it accessible using natural language search and then generating first drafts that match your voice, tone, and style. ChorusAI works with Development, Digital, Comms, Marketing, Leadership, and Program teams.

**Cost:** \$350/month for 5 users, then \$30/month for each additional user.

**Contact:** Sam Landenwitsch, Co-Founder at [sam@chorusai.co](mailto:sam@chorusai.co)

**Created:** 2023

### Pros:

- Nonprofit-specific design built by sector veterans
- Unified platform for news and social media monitoring, document management, and content creation
- Natural language search across all data sources
- Source-forward research tools
- Built-in social media scheduler and analytics tools
- Client-specific model training and reinforcement learning

**Support:** Slack, Email, Knowledge Base, Phone, Text

**Integrations:** Google Workspace, Microsoft OneDrive & SharePoint, Notion, Dropbox, Facebook, Instagram, LinkedIn, X/Twitter, BlueSky

### Security:

- Client data is strictly used only for their specific organizational account
  - Third-party models are designed not to share or learn from user-provide data
- Third-party security audits
- Restricted access to documents based on user permission mirroring with database of record
- Enterprise-level security features available for larger organizations

**Similar Tools:** The platform combines the capabilities of Meltwater/Cission, Sprout Social/Hootsuite, Glean/Guru/Dashworks, Perplexity, and ChatGPT/Claude.

## Content Creation: Latimer AI

### Why might you need this?

Throughout previous editions of the Tools & Tech Guide, as well as in this one we have highlighted biases that often plague various LLMs. This tool allows you to use an LLM that actively combats bias and prioritizes the cultural and historical perspectives of Black and Brown people, aiming to provide a more inclusive and accurate AI experience compared to standard models that might perpetuate stereotypes or overlook diverse experiences; essentially, it's designed to provide a more equitable representation in AI outputs by incorporating data focused explicitly on marginalized cultures.

Note: The name "Latimer" is a tribute to Lewis Howard Latimer, a significant Black inventor.

**Website:** <https://www.latimer.ai/>

**Purpose:** Latimer.AI was created to mitigate bias and inaccuracies in AI responses specifically around queries related to diverse cultures. Built to more accurately reflect the experience, culture and history of Black and Brown people.

**Cost:** Latimer AI offers 25 free queries per week. Individual subscriptions are \$9.99 and \$14.99 per month for Basic and Plus plans. Enterprise plans are available on request. API Pricing: <https://app.latimer.ai/latimer-api/>

**Contact:** [john@latimer.ai](mailto:john@latimer.ai)

**Created:** Deployed version one in January 2024

### Pros:

- Accurate LLM queries from purpose-trained model
- User-friendly, familiar interface

**Support:** 24-Hour Response Time for Enterprise Clients <https://app.latimer.ai/contact-team/>

**Security:** Google Firebase for Account Creation and Stripe for payments.

<https://www.latimer.ai/pages/privacy>

<https://www.latimer.ai/pages/CCPA>

## Premade Social Media Graphics: IntoActionLab

**Website:** <https://www.intoactionlab.com/>

**Content Library:** <https://library.into-action.us/>

**Into Action Lab Cultural Calendar:** <https://www.intoactionlab.com/cultural-calendar>

**Purpose:** High-quality, unbranded, and free graphic content designed for seamless use across social media, digital platforms, and organizing efforts.

**Cost:** Free

**Created:** 2020

### Pros:

- Free, high-quality content
- Wide range from rapid response and evergreen materials to regional, national, pop-culture-relevant content and more

**Support:** Join their Slack: <https://www.intoactionlab.com/slack>

**Integrations:** API offered, plus fully integrated into social platforms and library repositories

**Security:** Email addresses are stored for contact purposes and never re-sold to any third parties

**Similar Tools:** Giphy, Tenor, Imgflip

## Content Creator Collaboration

### *Why might you need this?*

*Reaching out to diverse audiences is challenging. It requires creative thinking and, at times, a willingness to decentralize power so that movements can go beyond the reach of traditional leaders. One new model for civic engagement on platforms like TikTok and other social media is to hire people from the communities we are trying to reach and give them the freedom to execute strategies they know will work and craft authentic messages that speak to communities in their own words and style. This can help ensure that the decision-making power is concentrated in the hands of the people most affected by the issues.*

## Social Currant

**Website:** <https://socialcurrant.co/>

**Purpose:** Platform that matches progressive nonprofits, impact, and issue-focused organizations with social media creators to reach audiences more effectively. The tool helps save time by automating various steps in the creator partnership process and is also focused on assisting organizations to build strong relationships with creators.

**Cost:** \$750/month and up depending on need

**Contact:** Ashwath Narayanan – [ashwath@socialcurrant.co](mailto:ashwath@socialcurrant.co)

**Created:** Social Currant was founded in 2020 by then-college students. Their goal was to represent young people in progressive spaces. They did their first creator campaign for Community Change, sent 10,000 people to the White House’s website with resources around the Child Tax Credit, and were hooked. Since then, they’ve worked directly with over 3,000 creators.

### **Pros:**

- Creator sourcing, matches, and approval- access to Gen Z creator experts
- Creator Messaging & Relationship Building
- Negotiating contracts, payments, 1099s
- Custom reports & Analytics based on historical data
- Large creators catalog by issue, cause, zip code
- First party sign on to get access to creator data

**Integrations:** Docusign, Meta, TikTok APIs, Dots/Stripe payment processing

**Support:** Slack channel; dedicated customer rep; weekly calls; learning library with a coaching program; weekly office hours, 24/7 access to the team.

**Security:**

- The platform does not store any client data
- Data encryption practices include ensuring data is encrypted both at rest and in transit. In addition, PostgreSQL db has SSL enabled. Ensure proper and secure HTTPS requests
- Authorization follows both role and permission-based access

**Timeline:**

- Average campaigns are 4-6 weeks.
- Rapid response campaigns have been executed in 3-5 days if needed

**Similar Tools:** Be A Good Influence

**CRM*****Why might you need this?***

*For 25 years, the Progressive Technology Project (PTP) has been organizing resistance to Big Tech, partly by providing non-corporate, people-controlled technology programming to the social justice movement. In 2010 and in response to calls from the movement, PTP, in collaboration with community organizers, created Powerbase—the open-source, non-corporate, alternative CRM database solution for organizers—and the program has been pivotal to magnifying base-building efforts for the past 15 years. Now in 2025, it's become even more important to transition away from Big Tech and use movement technology providers.*

**PowerBase by The Progressive Technology Project**

**Website:** <https://ourpowerbase.net/>

**Purpose:** Powerbase is a non-proprietary, open-source CRM designed to support the many facets of community organizing and advocacy work--both online and on the ground, i.e., base building, leadership development, advocacy, fundraising, membership, participation and engagements, events, mass communications (email and sms), case management, foundation tracking, reports, and more. Powerbase is an ecosystem that includes CRM, training, coaching, tech support, and hosting.

**Cost:** <https://ourpowerbase.net/#portfolio>

**Contact:** [support@progressivetech.org](mailto:support@progressivetech.org)

**Created:** Powerbase was launched in 2010 following a year-long pilot working with community organizers from a dozen grassroots organizations of various organizing models who collectively designed and developed Powerbase with PTP (<https://progressivetech.org>) with data security and privacy in mind.

**Pros:**

- Track participation in events, meetings, etc., and track relationships, engagement with contacts
- Robust fundraising features, including peer campaigns. Built-in credit card processing
- Mass email, including tracking metrics and mass sms texting
- Phonebanking, petitions, secure online forms, case management workflows
- Election district updates

**Support:** PTP provides trainings, tech support, and strategic coaching via email, phone, video calls, and in-person

**Integrations:** Cicero, Open States, Twilio, Click-a-Tell, Stripe, Authorize.net, PayPal, QuickBooks

**Security:** PTP owns its servers. Privacy Policy - <https://progressivetechnology.org/privacy/>

Data Security Standards - <https://network.progressivetechnology.org/node/1131>

**Similar Tools:** CiviCRM, ActionNetwork, Constant Contact, Mailchimp

## Voter Intelligence

### Why might you need this?

*Political Explorer offers two services: Voter Registration/Voting Rights Restoration Data and Data Mapping and Analytics Tool. Registering new voters is costly and labor-intensive, so organizations need to be able to target their efforts. That requires knowing which potential voters are people of color, young voters, single women, low-income, previously incarcerated, and other demographic characteristics. Creating top-notch visualizations can often take time and requires a high skill level. With Political Explorer's Data Mapping and Visualization tool, users can create interactive maps in minutes while also being able to pull data analysis reports quickly. The Data Mapping and Analytics Tool is helpful for election analysis, reports to funders, and voter contact universe visualization.*

## Political Explorer

**Website:** <https://www.politicaexplorer.com/>

**Purpose:** To provide cost-effective data that will enable and maximize voter registration and to create data-driven interactive presentations with user-friendly tools. Transform any data analysis into a compelling story using a slide editor that offers change-over-time comparisons, data comparisons, and exports to PDF, PowerPoint, or embeddable HTML5. To analyze custom geographies using over 200 in-tool data sets.

### Cost:

- Voter Registration/Restoration: 2.5 cents per record, including all fields, cell and landline numbers. State Voices/Progressive Organization Discount: 1.75 cents per record. Email Append 4 cents additional.
- Data Mapping: Regular Price: \$795 monthly (\$9,540 annually). Discounted State Voices/Progressive Organization Price: \$625 per month (\$7,500 annually). Additional Workspaces: \$1,800 per year.

**Contact:** Roger Alan Stone, 202 412-6616, [roger@politicaexplorer.com](mailto:roger@politicaexplorer.com)

**Created:** 2022 Political Explorer was jointly created by Advocacy Data, a voter file and contact data vendor founded in 2002, and Social Explorer, founded in 2007. Both are the leading mapping analytics software used by academia, the Federal Reserve, and The New York Times.



**Pros:**

- Create interactive maps without having to write code
- Load in custom data sets for visualizations
- Analytics panel that pulls data for custom geographies
- Political Explorer records contain: Name, Postal Address, Cellphone and Landline Numbers, Gender, Age, Ethnicity, Language Spoken, Religion, Income, Likely Union Member, Modeled Issue Data, and over a hundred additional demographic and lifestyle fields.
- To better target State Voices resources, Political Explorer has created a “New Majority Universe” of POC, Young 18-35, Low Income, Female Likely Pro-Choice, Likely Union Members Potential Voters. This universe can be adjusted to meet an organization’s specific needs and targets.

**Support:** Up-front training/demo; on-platform user guide; email support 9 am ET to 5 pm ET

**Integrations:** Data is formatted to enable easy transfer into NGP VAN

**Security:** All data and applications are fully encrypted and hosted in AWS East (Reston) with redundant backups. Data may only be accessed by authorized data managers who may access the system virtually (only).

**Similar Tools:** QGIS/ArcGIS

## Voter Portal

### *Why might you need this?*

*If you frequently get asked by voters, “Who should I vote for?” or “What’s on the ballot?”. If you’re worried that your community won’t turn out to vote or will skip local contests because they don’t know who’s running or why those positions matter. If you create your own voter guide every election and want to save on weeks of time spent, while building your organization’s capacity. When voters don’t understand their ballot, it can be a barrier to voting. Voters get overwhelmed by complex language and candidates with unclear stances. A comprehensive voter portal solves this with comprehensive ballot research down to the local level, removing uncertainty and providing clear answers about candidates and ballot measures.*

## BallotBuilder

**Website:** <https://www.ballot-builder.com/>

**Purpose:** Ballot Builder is a digital ballot guide platform that provides complete coverage of what’s on each voter’s ballot. It provides accurate local research down to school boards and ballot measures, with beginner-friendly and easy-to-understand language. It helps increase turnout by educating voters before they get to the polls and supports organizations in collecting voter contact information to build engagement.

**Cost:** Cost depends on the geographic area covered by the ballot guide. Pricing starts at \$4,000/year for a single municipality or county-level guide and maxes at \$30,000–\$60,000/year for a statewide guide, depending on the size and complexity of elections. Pricing can be tailored to your coverage area and budget.

**Contact:** [Walter@branch.vote](mailto:Walter@branch.vote) or the [Contact form on the website](#)



**Created:** 2020 (developed in partnership with grassroots organizations in Georgia before expanding nationwide).

**Pros:**

- Complete local coverage: Matches voters to every office and measure, even at the municipal or school board level, more accurately than other voter guide tools.
- Nonpartisan candidate summaries: High-quality profiles explain where candidates stand on the issues in simple language to reach new or less-confident voters.
- Ballot measure breakdown: Translates complex ballot referendums into plain language, explaining what a “yes” and a “no” vote means.
- Built for engagement: Organizations can collect voter contact info, identify high-engagement voters, and grow their base.
- Language accessibility: BallotBuilder supports the complete translation of ballot content into 15 different languages, with more languages being added. Fully screen-reader accessible.

**Support:** Onboarding and training for staff/volunteers, including strategy sessions to develop a messaging strategy. Email-based resolution system with a resolution time of 1 business day. Ongoing monitoring and research updates to accommodate new elections or ballot changes.

**Integrations:** VAN & EveryAction, CSV Export for flexible data use.

**Security:** Follows OWASP Top 10 best practices, Encryption in transit and at rest for all data. Minimizes storage of sensitive PII.

**Similar Tools:** Ballot Ready, Vote411, Ballotpedia

## Election Law and Legislation Tracking: Voting Rights Lab

**Website:** [tracker.votingrightslab.org](https://tracker.votingrightslab.org)

**Purpose:** Track legislation related to voting and ballot access, search for legislative trends, compare and contrast laws in different states

**Cost:** Free

**Contact:** For general tracker inquiries: [tracker@votingrightslab.org](mailto:tracker@votingrightslab.org); For general inquiries about the Voting Rights Lab: [hello@votingrightslab.org](mailto:hello@votingrightslab.org)

**Created:** 2018

**Pros:**

- A comprehensive resource of current legislation and legislation going back two years
- Can search by impact as well as topic and state
- They also compile current laws so you can compare the process of voting in different states or see how legislative trends stack up against the current legal landscape
- Bills are summarized and the current legislative stage is noted
- You can save a particular search and sign up for an alert when there is movement on certain bills or when new bills are introduced

**Support:** <https://tracker.votingrightslab.org/how-to-use-this-tracker>

## Feedback Collection and Analytics

### *Why might you need this?*

Jotto makes engaging, interacting, surveying, and gaining insights easy. People just scan the unique Jotto QR code, answer questions (via video, voice, or text), and then can be redirected to additional content. Jotto's AI-driven reporting platform quickly translates feedback into actionable insights, identifying trends, needs, and satisfaction levels.

### Jotto

**Website:** <https://www.jotto.me/>

**Purpose:** Jotto's mission is to include voices that are missing from the conversation by making it easy to share ideas, experiences, and stories. All-in-one feedback tool with AI-driven reporting that quickly collects and translates video, text or audio feedback into actionable insights, identifying trends, needs, and satisfaction levels from constituents.

**Cost:** Packages are based on usage and start at \$899. Special discounted packages for the State Voices Network: <https://jotto.me/state-voices> as well as a free trial: <https://jotto.me/try>

**Contact:** Roger A. Stone, [roger@jotto.me](mailto:roger@jotto.me)

**Created:** Launched in 2019, Jotto combines technology from three groundbreaking and influential social justice technologies developed by Quadrant 2, Inc (est 1996): The I'm Getting Arrested app (2011) for Occupy Wall Street, Stop and Frisk Watch/Mobile Justice for the ACLU (2012), and WorkIt for OurWalmart/United for Respect (2016). These were the first in their categories: a mobile messaging panic button app for demonstrators, the first video bystander technology for documenting real-time video interactions with police, and the first AI mobile chatbot acting as a virtual union rep for the 1.3 million non-unionized Walmart workers.

#### Pros:

- Real-time feedback - people simply answer a question with video, voice or text
- Instant analysis of open-ended qualitative feedback
- Available anywhere, via desktop and mobile web experiences - nothing to install Easy to use - activated by a link click or QR code scan
- Redirect anywhere after submission - great for continuing engagement or fundraising
- Straightforward integration with email, sms, and social media campaigns, print, digital, and even apps and websites
- Built-in newsfeed directly invites feedback and share updates outside social channels
- Push notifications and direct messaging creates a two-way communication
- AI reports summarize large collections of qualitative feedback instantly
- Import and analyze external data sources like call center recordings, chat transcripts, and legacy form-based datasets
- Over 140 languages
- You own the data and can export it

**Integrations:** Deeplinks, QR codes, web app, plug-ins and custom theming enable integrations with any user-facing application (email, sms, websites, mobile, social media, print, broadcast). This

makes it easy to integrate with platforms like ActionNetwork. Open-source templates anyone can use. The data you collect is yours, and can be exported into other applications. Secure API access is available based on the plan and your needs.

**Support:**

- New Client Onboarding: kickoff call, overview training on the platform, and guidance on the first activation from a Jotto client success manager
- Recurring check-ins with a client success manager for guidance on long-term strategy, tool features, and client best practices
- Email support response within 24 hours
- Phone/video support available M-F 9-5 ET
- Optional dedicated strategic support of up to 10 hours/month

**Security:** You own all of your data that's provided or generated through your Jotto campaigns; Jotto will not repackage or use your data for any other client. Jotto's AI is containerized, and Jotto will not sell or use your data to train our AI. Jotto is used by local and state governments and is certified to meet government security and resiliency requirements. Please visit our EULA and Privacy Policy for details. <https://www.jotto.me/policies/privacy> <https://jotto.me/policies/terms>

**Similar Tools:** Traditional polls, forms, and surveys

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## Organizing: Action Builder

**Website:** <https://www.actionbuilder.org>

**Purpose:** Action Builder is an organizing platform built by organizers, for organizers from the ground up for organizing and leadership development. A tool designed for organizers on the go, giving them needed information at their fingertips to grow power and win real change. Developed by experienced organizers, Action Builder focuses on direct outreach, continuous engagement tracking, and identifying emerging leaders. It bridges the gap between digital initiatives and meaningful follow-up, ensuring that every interaction strengthens the movement. Action Builder was built using the identical not-for-profit cooperative model honed through the development of our partner tool, Action Network.

**Cost:** <https://www.actionbuilder.org/partnerships>

**Contact:** Marvin Steele, Director of Partnerships, [marvin@actionnetwork.org](mailto:marvin@actionnetwork.org)

**Created:** Action Builder was launched in 2019 to meet a critical need within the progressive movement.

**Pros:**

- Organizing: Use Action Builder to communicate, mobilize, recruit and engage with union members, grassroots supporters, campaign volunteers and communities.
- Relationships: Track relationships and engagements of your campaign's activists, supporters, members, and people.
- Assessments: Use a customizable, color-coded assessment scale to assess campaign interest and support of your activists, members, supporters, workers, and others.
- Chart View: This feature helps you quickly recognize patterns in leadership growth and identify where to invest energy to develop more leaders.

- Mapping: Visualize and understand strength across locations like worksites, campuses, stores, schools, and neighborhoods.
- Tasks: Quickly and efficiently assign work to activists and organizers to manage their progress.
- Data and Tagging: Data in Action Builder is fully searchable, flexible, and completely customizable.
- API and Integrations: Action Builder can integrate with Action Network and Catalist to keep your data up to date. It also has an API for syncing with other databases.

**Integrations:** Action Network, Catalist, SQL Mirror

**Support:**

- Evergreen weekly training to help optimize all tool features
- Support hours are 9 am – 5 pm ET, [support@actionbuilder.org](mailto:support@actionbuilder.org)

**Security:**

- Action Builder Privacy Notice:  
<https://actionbuilder.zendesk.com/hc/en-us/articles/22117896614292-Action-Builder-Privacy-Notice>
- Action Builder Terms of Service:  
<https://actionbuilder.zendesk.com/hc/en-us/articles/22116859197460-Action-Builder-Terms-of-Service>
- Action Builder Data Processing:  
<https://actionbuilder.zendesk.com/hc/en-us/articles/35004779511828-Data-Processing-Terms>

**Similar Tools:** EveryAction, DaisyChain

## Distributed Organizing and Events: Controlshift

**Website:** <https://www.controlshiftlabs.com/>

**Purpose:** ControlShift is a distributing organizing toolset that puts your supporters at the center of your advocacy with member-led petitions, events, and local groups. ControlShift empowers supporters to start campaigns in their communities easily, provides them with tools to make their actions successful, and makes it easy for organizations to moderate and manage all activities created on the site.

**Cost:** <https://drive.google.com/file/d/1mDv5z5u1gw9TdejAsmhi2lxpXFr77eT/view?usp=sharing>

**Contact:** [talk@controlshiftlabs.com](mailto:talk@controlshiftlabs.com) or [kristy@controlshiftlabs.com](mailto:kristy@controlshiftlabs.com)

**Created:** Founded by Nathan Woodhull in 2011 as a project of GetUp! in Australia, which wanted to build a member-led petitions tool to support their distributed organizing work. Later expanded the toolset to include member-led events and local groups.

**Pros:**

- Can integrate native Mobilize events into map and feed
- Built for distributed organizing – the supporter-facing tools are easy to use, even for those without a lot of technical expertise.

- Admins have powerful moderation tools to make it easy to manage the items created on the site
- White-labeled and customizable to match your organization's look and feel
- Multilingual support for public-facing and staff-only pages, with 22 current languages, including right-to-left support

**Integrations:** Mobilize events, various CRMs: Action Network, ActionKit, Engaging Networks, EveryAction, NationBuilder, and Salesforce. Analytics and workflow tools: Google Analytics, Google Tag Manager, Segment, Matomo, Piwik, Slack, Freshchat. Organizations can build custom experiences with the tools they're already using via authenticated REST APIs and webhooks.

**Support:** via email during US ET business hours; written/video tutorials are available in the Help Center. Twice weekly office hours are generally organized around a specific topic but also allow for general questions. Customers can also schedule special training and help calls via Calendly whenever they'd like.

**Security:** <https://www.controlshiftlabs.com/details/privacy-and-security>

**Similar Tools:** Mobilize, Action Network

## Relational Organizing

### *Why might you need this?*

*If you're wondering how to get your message out to a broader audience, using trusted messengers - Relational Organizing solves for that. It is a community-based approach to civic engagement that emphasizes building deep relationships with people to mobilize them around shared values and goals. In short, it is asking activists to mobilize their own personal networks for the common cause.*

*Whether you're organizing traditionally underserved populations or people who are tired of getting texts from strangers - Relational Organizing is an effective way of building community and support. Keep your supporters connected to your work, turn every interaction into a canvassing attempt, tap into the power of existing relationships and trust, scale and track voter registration, and empower folks to bring your messaging to their online spaces and social networks. Read more about Relational Organizing in the [23-24 Tools & Tech Guide](#).*

## Reach

**Website:** <https://www.reach.vote/>

**Purpose:** Reach specializes in five organizing buckets:

- **Digital Campaign HQ:** digital organizing hub where supporters can take action, view Mobilize events, chat, and compete with other supporters.
- **Community Canvassing:** a search engine for your campaign's voter file so your supporters can search for any voter they meet and canvass them on the spot.
- **Relational Organizing:** allows your supporters to match their contacts to the voter file and contact them as trusted messengers.
- **Voter Registration:** Reach's "Choose your own Adventure" style of voter registration allows you to run a scalable, distributed voter registration program that blends seamlessly with community canvassing and relational organizing.



- **Social Media Content Sharing:** you can provide a whole library of images and videos that your supporters can browse and share directly from Reach to every social media platform, even leaving you reviews of the content and feedback on how the sharing went.

**Cost:** <https://www.reach.vote/pricing/>

**Contact:** Melinda Amato, [melinda@reach.vote](mailto:melinda@reach.vote)

**Created:** 2018

**Pros:**

- Information added by a volunteer for a person on the voter file can be easily synced to VAN
- Offline mode for accessibility in rural areas or native lands
- Content library with content you upload directly, shared galleries from other Reach campaigns, and user-generated content users submit for your review.
- Easy import of personal contacts, match them to the voter file, and contact them with any messaging app on the user's phone, utilizing campaign-provided scripts.
- User Groups let different users have different experiences in Reach
- The ability for Slack-like channel communication, including admin-only announcements
- Free unlimited push notifications to users
- Expandable multi-lingual support, allowing the Reach UI to appear in any language.
- Text magnification and screen reader support for increased accessibility and the ability to edit voter names to avoid dead-naming voters

**Integrations:** VAN My Campaign, VAN My Voters, EveryAction, Slack, Mobilize, BigQuery Mirrors, PAD

**Security:** Enforcement of Strict Transport Security (HSTS), SAMEORIGIN (preventing clickjacking), XSS prevention via strict content security policy setup (prevents cross-site scripting attacks), CSRF protection, and strict CSP (preventing JS injection) alongside a litany of other safeguards. The primary datastore has zero direct or exposed points of entry & is backed up daily. Data is encrypted at-rest and in-transit, and every connection to the database, alongside every interaction with frontend and backend services, is logged centrally and backed up to the cloud storage. <https://www.reach.vote/knowledge-base/a-note-about-data-security/>

**Similar Tools:** Impactive, OutreachCircle, Empower, Rally by Relentless



# BEST PRACTICES FOR TOOL IMPLEMENTATION

Nonprofits occupy a unique digital space. We use often-made-for-profit tools to perform tasks that support our organizations' missions and goals, which frequently lie far away from the metrics the vendors themselves use to measure success. Moreover, features that can solve for specific challenges nonprofits face can be overlooked in favor of those that are in high demand by the broader for-profit market. Nonprofits frequently find themselves looking for a solution but hesitate to adopt it once it is found.

## Tool Reviews

Regular tool reviews allow you to keep up with the fast pace of tech development. But that is just a surface-level observation. When diving deeper, there are many benefits to having a regular review cadence of all your digital tools, not only when a new need or challenge arises.

### Why is it important to conduct regular tool reviews?

A well-executed tool review can answer a host of operational and budget questions for an organization. It can help inform future growth strategies and eliminate redundancies. Some of the questions you should be able to answer coming out of your tools review are:

- **Are we spending our money wisely?**
  - Most obviously, is there another more budget-friendly solution? While budget considerations should not be the sole motivating factor in these reviews, they can absolutely be a catalyst for further improvements in the overall tech stack and efficiency. Looking at other pricing options can also help keep prices lower overall.
- **Are/were the tools effective for what we needed them to do? Are we getting the most from our tools?**
  - How did your end-users feel about using the tools (challenging, comfortable, etc)?
  - Pluses and deltas from using the tools.
  - The challenges you are solving could have changed. Are there new features in any existing solutions that can eliminate multi-tool workflows with one? Could we expand the use of the current tools to address new challenges?
  - How receptive to feedback is the tool vendor? Are changes based on feedback explored or implemented?
- **Are the tools we currently use the ones we want to continue using?**
  - If not, why are we still using these tools?
  - This is also a great time to reflect on your organization's feedback on the tool's performance. Ultimately, the reviewer is not always the end user, and even if they are,

holistic feedback from all stakeholders can shed light on previously unexplored areas as well as potential future needs.

- **After a period of use, are there better tools now available for this purpose?**
  - The conclusions you can draw from gathering this information can answer the crucial questions of whether the current tool or stack is actually doing what you need it to do, and if not, prompt you to continue your research into effective solutions. This is a moment of truth that can shine a light on processes that do and do not work.

This also allows you to keep a competitive analysis of the current digital landscape and determine if you are using the best digital solution for your needs or if better tools for this purpose are available.

## How to begin a review of tools

If your organization does not have a regular cadence for digital tool review, initiating the first one can feel intimidating. However, it is a crucial step in the overall strategy for new tool adoption and helps enhance organizational efficiency. While it can seem like a huge undertaking, it can be broken down into simple steps you can modify and replicate year after year. Consistency and uniformity are key when conducting these.

- **Identify key stakeholders**
  - If the tool is designed to have a specific function- identify that function as a clear objective.
  - Use cases are important!
- **Identify current internal needs the tools serve and any gaps in their functionality.**
- **Research current tools landscape**
  - Identify who is conducting the research on the tools
    - Think about what your trusted sources are
  - What do other organizations in the space use to perform these functions?
    - Talk to your colleagues and network!
  - What tools are available, and what are their price points?
- **Establish evaluation criteria based on organizational needs**
  - Involve relevant team members to assist with demos, review process, and encourage them to provide feedback
- **Compare core functions in the current tool stack vs market offerings**
  - Collect feedback from stakeholders and relevant team members



## Helpful resources

There are various helpful resources available when researching and reviewing tools. We've made a list of them here. This is a great place to start, but you should not limit yourself to these websites.

- <https://www.statevoices.org/reports/the-2024-tools-tech-guide/> The previous edition of this Guide provides a comprehensive **overview and recommendation list** of tools and resources, including but not limited to legislative advocacy, phone dialers, CRMs, and digital and relational organizing.
- [www.g2.com](http://www.g2.com) formerly G2 Crowd, is a **peer-to-peer review site**. Reviews are screened for accuracy and verified as coming from real users.
- [www.capterra.com](http://www.capterra.com) is a free online intermediary between buyers and technology vendors. Assists consumers in selecting software for their needs through **user reviews and research**.
- [www.softwareadvice.com](http://www.softwareadvice.com) provides **advisory services, research, and user reviews** on software applications for businesses in over 300 market categories.

## Conducting the review

- Establish **evaluation criteria** based on organizational needs: make sure this format can be applied to other tools and future reviews
  - Criteria may include:
    - Ethics and mission alignment
    - Functionality and accessibility
    - Price point: *don't forget to look for nonprofit discounts*
    - Track record: *longevity; legacy tool vs new tool*
    - Prior experience with tools: *how does what you are reviewing compare to other experiences*
- Establish a **feedback collection process** for tools that had been used
- **Compare core functions** in the current tool stack vs market offerings
  - For market offerings, involve relevant team members to:
    - Attend demos
    - Provide feedback
    - Hands-on testing where available
  - Assess the feedback collected provided by the team and relevant stakeholders
- Issue **report on findings** to the team and relevant stakeholders

Here is a sample checklist you can use to initiate a tools review process. Feel free to change it and customize it for your unique organizational needs: [Tools review checklist](#)

## Making a digital tool selection

Follow through with the key findings from your tools review report. The uniformity of the process ensures that the same general criteria and/or KPIs are applied to evaluating all digital tools, making the process standardized, transparent, and as fair as possible. This can also help remove unwanted decision anxiety or friction points between team members- it is not a unilateral decision but a review and conclusion made based on the feedback provided by key stakeholders. Additionally, a clear grasp of the current market, functionality of competitors, and pricing points can be a helpful tool during contract negotiations and further down the line in training and support development.

## Framing New Tools: Expectations and Messaging

When expectations are not clearly defined or communicated, there's a higher chance that reality does not align with what someone believes should happen, leading to feelings of frustration and letdown. By clearly stating what you expect, you minimize the possibility of being surprised by an outcome that doesn't meet your internal standards.

One of the most common reasons people might not like a digital tool is because... **it's not what they've expected!**

- Be honest and clear about what the expected performance is and what successful usage of the tool looks like.
- Avoid pitting legacy tools against new tools. People tend to fall back on what's most familiar rather than embark on something new, so focus on the unique features that the new tool offers.
- Frame the new tool as a solution rather than an additional thing the team has to learn, even if there is a learning curve.

By now, your stakeholders have already been involved in the robust digital tools review process and feel a sense of ownership in the decisions that were made because they have been involved from day one—**this is your buy-in!**

People tend to lean toward their comfort zone, and anything new requires an increased cognitive load. Change management is a topic that has been extensively researched, highlighting user habit adjustments as a sign of full adoption. As humans, we are naturally resistant to change and right messaging can help you form new habits anchored on using the new tool. Lean on your organizational culture when developing messaging around new tools. This will help you set expectations and define what success looks like. The language should be familiar and widely used within your organization. Do not just hammer on tech features- make rational and emotional appeals by describing future workflows and successes the new tool can lead to. Remove any biases with which new users might be looking at the new tool to allow them to form their own independent opinions through hands-on usage!

- Start preparing for implementation and roll-out early by letting stakeholders know of upcoming changes as far in advance as possible.
  - Talk not just about the features or the **"HOW."** You have to prioritize the value and the **"WHY."** Use language that helps users visualize how these changes will make them the professionals they want to be.

- Craft your message around solutions the new tool will provide and highlight the support the vendor and/or the organization will offer for the new tool.

## Implementation

When preparing your implementation, it's crucial to approach it as a continuous process that starts with initial adoption and encompasses the tool's lifecycle with continuous post-onboarding training and support. It is a best practice to craft a roll-out visual roadmap with key dates and events. A well-put-together roadmap provides a clear visual plan for introducing a new tool, ensuring everyone involved understands the timeline, key milestones, and priorities, which helps to align teams, manage expectations, and facilitate smooth implementation across different departments, minimizing confusion and maximizing the chances of a successful rollout.

Additionally, a best practice staple when rolling out a new tool is conducting regular trainings. This is when you can address any skill gaps between users and establish a foundation for new habits of tool usage. These trainings should be targeted for specific users, i.e. dedicated time for admin training and dedicated time for end-user training. Take this time to work with objections and resolve any concerns or hesitations stakeholders might have, and allow safe and supportive environments in which to learn. Provide clear learning pathways and be mindful of not using tech jargon.

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When planning onboarding, it is a best practice to make sure the process you create can be replicated repeatedly with minimal effort and at scale if needed. Standardizing it across the organization will ensure each user gets a uniform experience with no unwelcome surprises. Users know exactly what is going on and what the next steps are. Be clear in your timeframes. Utilize other tools at your disposal, such as digital task managers, online learning platforms, webinars, slide decks, and pilot projects.

Last but not least, you should provide ongoing support. Stakeholders need to know that once onboarding is complete, they know where to ask for help and are not afraid to do so. One successful tactic is hosting regular Office Hours dedicated to specific tool support that stakeholders can join. Knowing there is dedicated time on the calendar for support helps remove anxiety some might experience when adopting new tech and helps level the playing field for less tech-savvy users. It also provides space to hear feedback, problem-solve, and innovate together.

A good short list of tasks for a successful implementation can include the following:

- **Roll-out roadmap**
  - Key dates, events, and milestones
  - Manage expectations
- **Accompanying trainings**
  - Address skill gaps
  - Form new habits and workflows
- **Onboarding**
  - Uniformed across the organization
  - Easy to replicate and scale up
  - Use other digital tools to help!

- **Ongoing support**
  - Office Hours

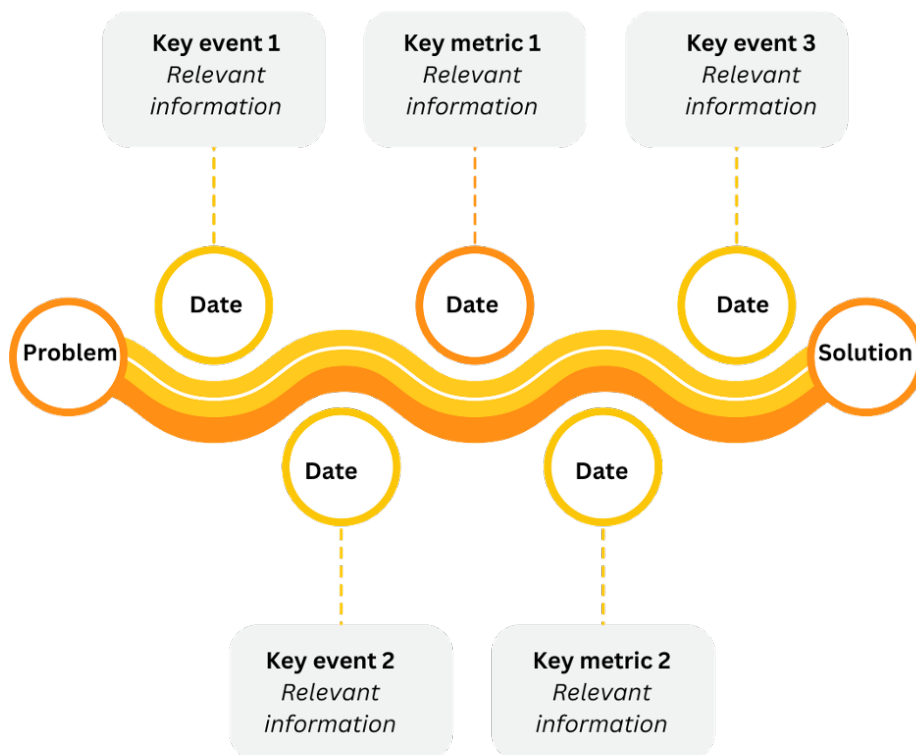
## What's a good roadmap?

A good roadmap tells the viewer everything they need to know without anyone having to explain. You should be able to look at the visual without deep technical knowledge and understand the overall process. Some key aspects of a good roadmap are:

- **Clear objective:** What will we achieve at the end of the road?
- **Audience specific:** Who is this for? The right level of detail for different audiences
- **Visually appealing and easy to read**
  - Accessibility!
- Clearly **communicates the future direction** of the tool implementation
- Shows a **timeline with key dates**, milestones, and events
  - Outline of actions and KPIs, i.e., “onboard X number of staff to the new platform by Y date”
- If key players have specific roles, indicate **who owns specific parts** of the roadmap

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### Example Roadmap





## After Implementation

You have successfully rolled out the tool, and it has been widely adopted. You have scheduled trainings and appropriate tool support. But how do you measure for success?

- Close the loop by adding the new tool to the list of digital instruments you review regularly!
  - No need to establish new processes
  - Use existing framework
  - Gather feedback from stakeholders as you did before
  - Compare how previous solutions performed vs newly adopted tools
- Issue report on findings to the team and relevant stakeholders

This will provide you with tool performance thus far, as well as feedback from stakeholders, and allow you to measure for success without introducing new processes but neatly fitting your new solution in the current established review cycle. An established uniformed digital tools review process that can be scaled up is at the center of preparing and overcoming new tool adoption anxiety!



# TOOLS TO UTILIZE FOR ELECTION PROTECTION

## National Election Protection Coalition Tools

### Election Protection (EP) Tools Suite

Partners within the National EP coalition have created a central database that all of the EP field program functions (recruitment, training, shifting, field reporting). Every state has free access to the tools to recruit volunteers, onboard and train them, and will present the variety of polling places our volunteers can sign up for. One of the major outcomes of this new tool suite is to share training material and data in our Election Protection Hub and create resources. The four main activities of the tool suite are: Recruitment, Training, Shifting, and Reporting. Those with access to the tool suite are: **Common Cause** staff, state leads, regional leads, and volunteers. Users can bring external information, but there is also a built-in function that is customizable.

- **Recruitment-** with the help of national EP coalition partners, we recruit volunteers across the country. Administrators of the tool have the ability to create and manage source codes for statewide coalition partners that can be synced back so partners can keep track of their volunteers.
- **Training-** the tool suite will offer a custom training tool that meets the expectations of Mobilize but will be able to be more customized for individual state needs. Training can be done virtually, in-person or on demand. A quiz can be uploaded to allow volunteers to complete following the training.
- **Shifting-** this tool allows for state leads to upload all of the polling sites they want volunteers to sign up for and create a schedule for early voting and election day shifts. Volunteers can then use the tool to find shifts that best fit their availability, location, language skills, and role. This allows for both roving and poll monitor shifts.
- **Field Reporting-** a reporting system that is parallel to the hotline 866-OUR-VOTE (866-687-8683) and other reporting tools. These reporting fields can be customized per state and the needs of the state.

### NewVL

NewVL (formerly known as OVL) is the system that records all hotline interactions with voters and field volunteers. Each time someone contacts the hotline, the hotline volunteer creates a new record (i.e. ticket) in the system that includes the voter's information and a description of the issue, among other things. Partner organizations monitor incoming NewVL tickets and follow up on reports as needed, including adding information to the ticket about how an issue was resolved. Data can also be used for program planning, advocacy, and litigation.



## Election Protection Resource Hub

A shared hub of resources, training and materials from organizations throughout the EP coalition. Once access is requested and granted, State leads will have access to the shared google drive of resources and will have the ability to upload materials they have created to share with peers across the country.

For access to any of the above Election Protection tools & resources, please reach out to your State Voices Policy contact for support.

## State Voices Network Tools to Supplement Election Protection Programs:

- Action Network
- OpenField
- Mobilize
- Dispatch
- Google Looker Studio

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# DISINFORMATION AND MISINFORMATION

This section is intended to provide information and tools for State Tables and partners working to combat election-related misinformation and disinformation, informed by the narratives and cases surrounding the 2024 US Election. The resources here are informed by State Voices' election protection efforts and collaboration with a wide variety of voting rights and democracy advocates.

If your organization would like further help or state-specific training to coordinate a strategy for combating misinformation and disinformation, please reach out to [gvelasco@statevoices.org](mailto:gvelasco@statevoices.org) for policy, training, and programmatic questions or to [asaslow@statevoices.org](mailto:asaslow@statevoices.org) for questions related to communications.

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## Definitions

**Misinformation:** False or inaccurate information that's spread, regardless of intent to mislead.

**Disinformation:** False information that's deliberately spread in order to influence public opinion or obscure the truth.

**Malinformation:** Information based on fact but presented outside of the context in order to cause harm.

**Inoculation messaging:** Messages you can use with audiences to combat misinformation before they even encounter it. These messages explicitly warn about the danger of being misled by misinformation and provide counterarguments explaining the flaws in that misinformation. Much like a vaccine, the objective is to proactively inoculate against anticipated problematic or false content before it takes hold.

**Debunking:** Messaging designed to counter mis and disinformation that's spreading. Best practices for debunking messaging include

- Clearly naming what is false;
- Highlighting the motivations of the actors spreading the false claims and;
- Stating the truth and linking to trusted sources.

**Generative AI:** The umbrella term for artificial intelligence tools capable of creating text, image, and video content using generative models, often in response to prompts from users.

## General Practices for Responding

The instinct may be to address every piece of false information online, but it's far more strategic to be selective and take a step back before amplifying or responding to these messages.

- **Avoid amplification:** Social media algorithms feed on engagement, whether negative or positive. Even reacting with “angry” on a Facebook post boosts it and creates the possibility for more people to see the piece of disinformation. In general, only comment on disinformation that represents a high-level threat to debunk false information
- **Do report:** If you encounter a piece of disinformation, flag it for removal from the social network and submit it to the [Common Cause tip line](#).
  - Note about platform regulation: A number of social media platforms have changed their platform policies and regulations since the last election cycle. In the absence of federal regulation, tech companies are free to change their disinformation policies and procedures on a whim, posing challenges for researchers and anti-disinformation advocates. The resources below outline the most recent changes from tech platforms and their current anti-disinformation policies (or notable lack of clear policies in several cases).
    - GLAAD: [Social Media Safety Index](#)
    - Accountable Tech: [Democracy by Design: Social Media’s Policy Scores](#)
    - Free Press: [Big Tech Backslide Report](#)
- **Avoid cross-pollination:** If you see a post on Facebook, avoid posting on Twitter about it, even to remark that it is incorrect. That only helps the disinformation spread and makes it more likely that it will become viral on other platforms.
- **Do inoculate:** Prime your audience to distrust disinformation when they see it by naming bad actors’ motivations and sharing factual information from trusted sources that encourage people to make a plan for voting.

Deciding whether or not to respond to disinformation should depend on two things: the likelihood of the message reaching voters and the likelihood of it causing voters harm. Use the questions below to guide your decision and the threat matrix to figure out what your response should be (excerpted from the [Election Protection Threat Matrix](#) from 2020).

#### Likelihood of reaching voters:

- Does the disinformation target historically disenfranchised voters, such as people of color, young people, older adults, and people with disabilities?
- Does this story have the potential for topic momentum or the capacity to turn into a larger narrative?
- Has the disinformation spread from one social media platform to another (e.g., from Twitter to Facebook)?
- Does it appear to come from a trusted source?
- Is the post receiving more than 1,000 interactions (e.g., likes, reposts, comments)?
- Are journalists or trusted messengers engaging and amplifying the disinformation?
- Are trusted messengers engaging and amplifying the disinformation?

#### Likelihood of causing voters harm:

- Does the disinformation hit on issues that are known to depress turnout and/or disenfranchise voters, such as long lines at polling stations, voter intimidation, and health concerns?

- Does this content put voters, poll workers, election officials, or volunteers in danger?
- Is the content specific? Does it seem actionable and have the potential to be true?
- Is the content posted with earnestness, or is it posted as a joke, sarcasm, or trolling?
- Does it have a specific call to action (e.g., signing a petition, voting for a candidate, protesting, etc.) that could influence how real voters behave offline or incite violence directed at voters?
- Is there fact-check content that accidentally amplifies the lie?
- There is often overlap in the impact of disinformation and political violence. To learn more about the resources available for the network, State Voices has created an [Electoral Safety Overview](#).

### Additional Resources

- [Disinformation Dashboard from the News Literacy Project](#): This 2024 mis and disinformation resource includes an organized dashboard that catalogs viral disinformation by theme (What are the viral falsehoods about) and type (What methods are being used to spread the falsehood).
- [Preparing for Generative AI's Impact on 2024](#): This handbook from the Drive Agency outlines key information about the potential impact of artificial intelligence on our democratic process in the year to come – including education and training for progressive organizations, ethical guidance for using AI, and methods to increase pressure and accountability among technology companies.
- [Political Ad Observatory from NYU Cybersecurity for Democracy](#): This tool allows users to explore political advertising across Facebook and Instagram and is searchable by keywords, topic, sponsor, or region.
- [OverZero Guidance on Communicating During Contentious Times](#): This resource outlines the Do's and Don'ts for local leaders to avoid inadvertently causing harm; specific insights for countering misinformation; and action steps to defuse risks for violence before, during, and after voting occurs.
- [Inoculation Theory](#): Digital Democracy Institute of the Americas (DDIA) published a report on inoculation theory and how it best works as a countermeasure against large scale disinformation. There is also a corresponding [60 Minutes story](#).

### In Language Resources (Spanish and Asian Languages):

- NALEO's [Defiende La Verdad Campaign](#) focuses on building capacity among community members and leaders to counter misinformation, disinformation, and malinformation (MDM) targeting the Latino community within the civic engagement space. If you are interested in supporting and /or have Spanish-speaking volunteers to support with Spanish language media monitoring, you can [sign up to work with NALEO here](#). If you are interested in learning more about the program or have questions, email Josué Romualdo at [jromualdo@naleo.org](mailto:jromualdo@naleo.org).
- APIAVote: APIAVote compiles a biweekly report on problematic narratives impacting the Asian American and Pacific Islander communities. To be added to the email list for these reports, email Kyle Van Fleet at [kvanfleet@apiavote.org](mailto:kvanfleet@apiavote.org).



# TOOLS FOR DATA PRACTITIONERS

## Versioning and Code Sharing

### *Why might you need this?*

A version control platform is essential for managing changes to code, documents, or any digital project, ensuring that every modification is tracked and reversible. It allows multiple collaborators to work on the same project without disrupting the main workflow. Version control also provides backup and recovery, preventing data loss and enabling rollbacks to previous versions if needed.

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## GitHub

**Website:** <https://github.com/>

**Purpose:** Managing and tracking changes to programming code, facilitating code collaboration, and sharing

**Cost:** Free for 501c3 organizations

**Nonprofit Discount:** <https://support.github.com/contact/nonprofit>

**Compatibility:** Online, Desktop App for Mac, Windows

**Created:** 2008

### **Pros:**

- Allows you to rollback changes to code
- Can control access and limit who can save code

**Support:** Online Community, Support Tickets

**Security:** SSL, 2FA, private code repositories

**Recommendation:** Using a version control system is strongly recommended if your organization does any software coding or code scripting. This is a form of institutional knowledge sharing. Check out the shared repositories of other organizations.

**Similar Tools:** GitLab, BitBucket, Azure DevOps

## Software Code Editor

### *Why might you need this?*

Code editors are specialized software designed to help software developers write programming code.

## Visual Studio Code

**Website:** <https://code.visualstudio.com/>

**Cost:** Free

**Compatibility:** Mac, Windows

**Created:** 2015

**Purpose:** Editing source code

**Pros:**

- Most widely used code editor with numerous resources for support
- Very user-friendly for beginners
- Auto-suggests completion of code

**Support:** <https://code.visualstudio.com/learn>

**Security:** <https://privacy.microsoft.com/en-US/privacystatement>

**Similar Tools:** Sublime Text, PythonCharm

## Command Line Tools

**Why might you need this?**

These are tools that do not have a graphic user interface (GUI) with buttons and windows. Command line utilities run in a text-based program called a ‘command line interface’ (CLI). They are generally more powerful and faster than using an application. They can be used to do things that are difficult or impossible to do with a GUI application. Typically CLI utilities can automate tasks and can perform multiple tasks simultaneously.

## Parsons

**Website:** <https://www.parsonsproject.org>

**Cost:** Free

**Compatibility:** Mac, Windows

**Created:** 2019

**Purpose:** An API wrapper for Python to streamline integration of frequently used tools in the progressive community, such as NGPVAN, ActionNetwork, Twillio, AWS, and Civis.

**Pros:**

- Free
- Actively Maintained
- Focused on and directed toward our typical work

**Support:** Live Training, Slack Channel, listserv, Github

**Security:** Parsons doesn’t retain or transmit any data.

**Similar Tools:** Individual tool APIs



## RStudio

### Why might you need this?

R programming language is a useful tool for data scientists, analysts, and statisticians, especially those working in academic settings. R's ability to handle complex analyses such as machine learning, predictive analytics, GIS data, and more makes it a valuable asset for various data-related tasks. RStudio is an integrated development environment (IDE) for R and Python

**Website:** <https://posit.co/products/open-source/rstudio/>

**Cost:** Free

**Compatibility:** Windows, Mac, Linux

**Created:** 2011

**Purpose:** R is a system for statistical analysis and data visualization

### Pros:

- Free
- Versatile
- Well-maintained
- Wide user-based, so lots of resources exist

**Support:** <https://community.rstudio.com/>

**Similar Tools:** Python, Stata, SAS

## Anaconda

### Why might you need this?

Anaconda combines Python and R for data science, statistical analysis, machine learning, data processing, and predictive analytics. It includes many of the most popular and commonly used data analytics and coding packages such as Numpy, Scipy, and JupyterLab.

**Website:** <https://www.anaconda.com/>

**Cost:** Free

**Compatibility:** Windows, Mac, Linux

**Created:** 2012

**Purpose:** Data Analytics Development Environment

### Pros:

- Free
- Easy to Use User Interface
- Comprehensive feature set that makes getting started fast
- Compatibility with a lot of other applications.

**Support:** <https://anaconda.cloud/support-center>

**Similar Tools:** Python, R

## DBT

### Why might you need this?

DBT (data build tool) is a data processing tool typically used in the management of a data warehouse. Data Engineers use this to create workflows for their SQL queries to more efficiently create tables from large datasets. In the data management process called ETL (export, transform, load) DBT is classified under the “transform” category.

**Website:** <https://www.getdbt.com/>

**Cost:** Free self-hosted option available, dbtCloud \$100/user for Team version. Limited Free dbtCloud available. <https://www.getdbt.com/pricing>

**Compatibility:** Connects to data platforms, including Amazon Redshift, Google BigQuery, Azure Synapse, PostgreSQL, and others.

**Created:** 2016

**Purpose:** Data Warehouse data transformation tool

### Pros:

- Open-source with free options available
- Facilitates deployments of major data transformations
- Testing is built-in to ensure the workflows are functioning properly
- Compatible with major data platforms

**Support:** <https://docs.getdbt.com/>

**Similar Tools:** PySpark, Snowflake, Dataform

For more information and resources on SQL, R, Python, and packages, please refer to this guide: [Data Science Resources](#)

# DATA & TECHNOLOGY TRAININGS

## State Voices Data Certification Program: VAN Track

Our **Data Certification Program (DCP): VAN Track** is recommended for people who wish to improve their knowledge of VAN and gain expertise using data to power their civic engagement work.

Through our Data Certification Program, we provide access to a Learning Management System to help organizers, advocates, activists, and others improve their ability to use data and digital tools to foster positive change in their communities.

**How to Sign Up:** Sign up for the [Voices for Power](#) email list to be the first to know about future sessions of DCP: VAN.

## Social Movement Technologies

SMT is a nonprofit/NGO providing organizing strategy, training, and campaign support to build people power and win in the digital age.

**How to Sign Up:** State Voices sometimes qualifies for discounts when multiple people from the network sign up for SMT training, so if you're ever interested, please contact someone at State Voices. You can also sign up on your own via [SMT's website](#).

## Re:Power

Re:Power is a team of organizers, strategists, and technologists dedicated to building transformative political power. They train leaders within communities to create change.

**How to Sign Up:** You can [visit their website](#) to learn more about the various live and online trainings they are hosting.

## Arena Academy

Arena Academy is training for current and aspiring civic engagement staff, with a focus on training women, people of color, and members of the LGBTQ+ community. Arena holds 2 -3 Academies each calendar year in person and online. Participants take part in an immersive five-day learning experience, selecting one of seven tracks: Campaign Management, Communications, Data, Digital, Finance, Organizing, or Organizing Director. Scholarships are available, and two-thirds of Arena Academy participants receive some form of scholarship

**How to Sign Up:** [Visit their website](#) to find current training opportunities.

## DataCamp

In their own words: At DataCamp, we believe everyone deserves access to high-quality education and data skill development for a more secure future. As part of our mission to democratize data skills for everyone, we have always provided free, unlimited access to DataCamp for Classrooms for instructors and their students, serving more than 350,000 students around the world. We've also partnered with more than 120 nonprofit organizations to give 25,000 free DataCamp subscriptions to communities that need them most.

To sign up for DataCamp, go to <https://www.datacamp.com>.

## NTEN

NTEN is a community of nonprofit professionals who want to make the world a better place through the skillful and equitable use of technology. By connecting, upskilling, and enabling nonprofit organizations and professionals to use technology for social change, NTEN strengthens the transformative power of missions and movements.

NTEN provides educational opportunities, research on effective nonprofit technology practices, and creates spaces for collaboration to thrive. NTEN's work is guided by three core commitments: Connect, Learn, and Change, offering multiple ways to engage with the community.

### Connect

- [Community Groups](#) – Over 20 online groups and tech clubs formed on the basis of shared interests, affinities, or geographies that bring nonprofit technologists together to network and learn from each other.
- [Nonprofit Technology Conference](#) – The annual gathering of all things nonprofit tech you don't want to miss! At the NTC, you'll learn essential nonprofit technology best practices while connecting with a community that shares your commitment to social change.

### Learn

- [Online courses](#) – Explore a growing catalog of 30+ courses covering IT, digital inclusion, communications, and more — designed for you to complete at your own pace.
- [Professional certificates](#) – NTEN offers three certificate programs, allowing you to create a personalized learning journey by selecting courses from a wide array of topics. Current certifications include nonprofit technology management, digital equity, and AI for nonprofits.
- Fellowships and cohorts – These fully-funded cohorts bring together changemakers for training, networking, and mentorship on specific topics. While each fellowship has a slightly different structure, they are focused on [digital inclusion](#), [nonprofit technology management](#), and open-source [development](#).
- Resource hubs - These dedicated hubs provide curated resources, templates and tools on key topics like [AI for nonprofits](#), [cybersecurity for nonprofits](#), and [digital safety strategies for LGBTQIA2S+](#) organizations. Access explainer videos, publications, courses, strategy guides, and organizational templates at these hubs.

## Change

NTEN publishes several resources and templates to help nonprofits make effective decisions, including:

- The [Equity Guide for Nonprofits](#) – A comprehensive resource with strategies, templates, and tools to help your nonprofit embed equity and inclusion into its technology decisions and overall operations.
- [Tech Accelerate](#) – A free assessment tool to evaluate technology adoption and effectiveness across your organization. Organizations receive a custom report that highlights areas of most risk and provides resources for learning more and improving technology policies and practices.

## NTEN membership

While nearly all of NTEN's resources are available to the public, [becoming an NTEN member](#) allows you to access trainings and events at highly discounted rates, along with the opportunity to connect with others who are using technology for social change.

[NTEN membership](#) is offered on a sliding scale, with a suggested annual rate of \$99, making it a valuable investment that pays for itself. Member benefits include:

- 50% off [courses](#) and [certificates](#).
- Significant discounts on [Nonprofit Technology Conference](#) registration.
- 50% off [NTEN job board](#) postings and featured placement.
- Opportunity to write [blog posts](#) published on the NTEN website and shared with our community.



# HARD TECH RECOMMENDATIONS

In the previous iterations of the Tools & Tech Guide, State Voices went into a robust overview of current technology, software, and office equipment that might assist nonprofits in their day-to-day work. However, we recognize that technological advancements occur every day. We will provide general guidelines and recommendations on specifications that are optimal for running basic tool stacks that a nonprofit might have and are likely to future-proof your hardware, as well as examples in each category. We made an effort to source the best cost-effective choices on all the items because we recognize that many grassroots and nonprofit organizations are operating on tight budgets.

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Unfortunately, many of the cheaper prices are found on websites that don't always match our values. We encourage you to use browser add-ons that allow you to look for the best price. Additionally, we will outline important considerations you must keep in mind when purchasing hardware for your organization.

These recommendations are not intended to replace an organization's own research. Instead, it is a complementary resource or a foundational stepping stone, empowering nonprofits to assess their technological requirements and needs. It is essential to emphasize that this guide is not a substitute for internal research but rather a knowledge repository designed to prepare and inform your unique exploration process. We encourage each organization to research and assess items based on how well they will meet the organization's needs, the people it serves, and its ongoing operations.

## Equity in Tech

When purchasing technology, organizations must prioritize creating an inclusive, equitable, and accessible work environment. To facilitate this, NTEN has developed a comprehensive guide that offers practical strategies for mitigating biases that can inadvertently influence the distribution of technology in the workplace, promoting a more just and equitable technological landscape: <https://www.nten.org/change/equity-guide-for-nonprofit-technology>

## User/Buyer Reviews

When selecting items, especially hardware, we advise you to narrow your search to those with four- to five-star reviews and many reviewers (usually in the hundreds or thousands). This helps to ensure quality while also filtering out those that only have fake or paid reviews.

## Pricing

We understand that nonprofits have limited resources and, as such, encourage you to focus on affordable technology and office needs. We also recommend a browser extension (CNET Shopping) to help you find the website that is selling the item for the lowest possible price. Likewise, the software we included in this guide is either free, free trials or generous nonprofit discounts, or generally affordable for individual users or small teams. To the extent that a certain number of these tools are available through State Voices, we remind partner organizations that the terms and conditions of usage of the tool or software, including pricing, are specified in an agreement between State Voices and partner organization and we recommend that you refer to such agreement for accurate information regarding such terms and conditions of use. Please contact [datateam@statevoices.org](mailto:datateam@statevoices.org) for more information and the relevant agreement for any tool, services, or software used through State Voices.

## Integrations

Since nonprofit organizations already have access to and use a variety of tools in their everyday work, we made an effort to choose software that seamlessly integrates with the most commonly used tools by nonprofit organizations, such as Slack, Google Suite, and the most commonly used browsers. Many of these also have apps that can be downloaded onto Apple or Android devices.

## Longevity

We made an effort to list companies and websites with a proven track record of reliability and innovation. With a few exceptions, most of the software listed has been around for over a decade. We recommend purchasing hardware from vendors that are well-established and widely used in the tech community.

## Ethical Buying

Before diving into a few points on ethical buying, we think it's important to lift up the need for funding tech, software, and office equipment. When creating budgets and requests for funding, we believe that it's very important to not just budget and request funds for the typical expenses: staffing, print costs, etc., but also the technology and tools that help your organizations get the work done. Many grassroots and nonprofit organizations are operating on tight budgets therefore, we made an effort to source for the best cost-effective choices.

Achieving ethical consumption is challenging in the current environment, where consumers frequently face the dilemma of choosing cheaper, less ethical options, especially when budgets are severely restricted. This situation arises because corporations are incentivized to maximize profits, often by cutting costs associated with labor and environmental protection. Consequently, consumers are typically left to choose between affordable but unethical products or retailers and more ethical options that may be financially out of reach.

The responsibility for providing ethical purchasing options rests primarily with the major players in the market. Corporations have the resources and influence to implement ethical practices throughout their supply chains, from sourcing materials to manufacturing and distributing

products. They can also advocate for policies that promote ethical consumption. While consumers can contribute to ethical consumption by making informed decisions and supporting businesses committed to ethical practices, it is essential to recognize that corporations hold the ultimate responsibility for ensuring ethical consumption.

In addition, we encourage anyone reading this guide to do further research into affordable options for various retailers who match prices or support your values or to consider local stores in your area that support your local economy.



# RECOMMENDED TECH SPECIFICATIONS

The 2025-2026 Tech Guide continues to focus on technology, software, and office equipment that are optimal for working from home, as this has become more popular and necessary during the pandemic. Many nonprofit organizations operate in a completely remote capacity. However, as restrictions have been lifted, some organizations might have shifted toward a greater office presence or variations of hybrid office environments. Therefore, we will provide desktop and laptop recommendations that can be used for home office or organizational office setups.

## Laptops

Laptops remain a popular option for many remote and hybrid workers and those who frequently travel. Below are our latest hardware specifications for optimal performance.

### Storage:

- **1TB SSD** or larger for faster performance and sufficient space. If you manage large video files or projects, opt for a **2TB PCIe Gen 4 or Gen 5 NVMe SSD**.

### Processor:

- **8 cores or more**, clock speed of **3.50 GHz or higher**.
  - Examples: **Intel Core i7 13th Gen or i9**, **AMD Ryzen 7 7000-series**, or **Apple M3 Pro/Max** for macOS users.

### RAM/Memory:

- **16 GB** (minimum), though **32 GB** is recommended for better multitasking and future-proofing. Heavy users (e.g., video editors) should consider **64 GB**.

### Screen Size:

- **14" to 16"** screens for frequent travelers (portability), and **17"** for stationary setups.
- High-resolution displays like **1920x1080 Full HD or higher**, with **4K** for improved clarity.
- Look for **OLED or mini-LED displays** for better contrast and brightness. A **120Hz refresh rate or higher** is ideal for smoother visuals.

### Graphics (Optional):

- **Integrated graphics** are sufficient for office tasks.
- For graphic design or video editing, opt for a **dedicated GPU** such as:
  - **NVIDIA RTX 4050** or better (e.g., RTX 4060, RTX 4070).
  - **AMD Radeon RX 7600** or newer.

**Ports:**

- **USB-C (3.0 or higher)** or **USB4**, and **Thunderbolt 4** (if available) for faster data transfer and dual-monitor setups.
- **HDMI 2.0 or higher** or **DisplayPort 1.4/2.1** for external displays.
- **Ethernet port** or a **USB-to-Ethernet adapter** for stable network connections.

**Additional Features to Consider:**

- **Webcam and Microphone**
  - Opt for a **1080p webcam** with advanced features such as **auto-framing** and **AI-based noise cancellation** for enhanced video conferencing quality.
  - Look for **dual-array or quad-array microphones** with noise reduction to ensure clear audio during calls.
- **Battery Life**
  - Aim for **10-12 hours of battery life** to comfortably last through workdays and travel without needing frequent recharging.
  - **Fast-charging capability** is a plus, allowing the battery to reach at least 50% charge in 30 minutes.
- **Connectivity**
  - Ensure the laptop supports **Wi-Fi 6E** or **Wi-Fi 7** for faster, more reliable wireless connections, especially in crowded network environments.
  - Include **Bluetooth 5.3** for the latest wireless peripheral integration with improved range and stability.

💡 **Example Windows: Lenovo Yoga Pro 9i (16")** \$1,580.00 <https://www.lenovo.com/us/en/p/laptops/yoga/yoga-pro-series/yoga-pro-9i-gen-9-16-inch-intel/>

- **Performance:** Equipped with an Intel Core Ultra 9 185H processor, 32GB RAM, NVIDIA RTX 4050 GPU, and a 1TB SSD, this laptop delivers robust performance suitable for demanding tasks.
- **Display:** Features a 16-inch 3.2K Mini LED touchscreen with a 120Hz refresh rate, providing vibrant visuals and smooth motion.
- **Build and Features:** Boasts a premium aluminum chassis, a full array of ports including Thunderbolt 4, and a 1080p webcam with AI noise reduction.
- **Battery Life:** Offers around 6 hours of usage on battery saver mode with low brightness, which may be less than some competitors.
- **Considerations:** While it provides excellent performance and display quality, the battery life might be a limitation for users requiring longer unplugged durations.

💡 **Example MacOs: Apple MacBook Pro 14-Inch (M3 Pro)** \$1,629.00 <https://www.amazon.com/Apple-2024-MacBook-Laptop-10%E2%80%91core/dp/B0DLHNNH3B1>

- **Performance:** Powered by the M3 Pro chip, with 10 GPU cores.
- **Display:** 14-inch Liquid Retina XDR display with ProMotion technology for smooth visuals.



- **Build and Features:** Premium all-metal construction, snappy keyboard, excellent trackpad, and multiple helpful connections.
- **Battery Life:** Up to 30 hours, providing exceptional longevity.
- **Considerations:** While offering top-tier performance and build quality, it is relatively heavy for its size, and configuration prices can increase quickly.

💡 **Example Budget Version: HP 255 G10 Business Laptop \$549.00** <https://www.amazon.com/HP-Business-Display-Numeric-Windows/dp/B0C9KN43XW/>

- **Processor:** AMD Ryzen 5 7530U (6 cores, 3.5 GHz base) – Delivers solid performance for multitasking and productivity tasks.
- **Memory:** 32GB RAM – Seamless multitasking and smooth performance for everyday work and more demanding applications.
- **Storage:** 1TB PCIe SSD – Fast performance and ample storage for large files and applications.
- **Display:** 15.6-inch Full HD (1920x1080) – Crisp and clear visuals for work, browsing, and media consumption.
- **Graphics:** Integrated AMD Radeon Graphics – Sufficient for general use, office tasks, and light multimedia work.
- **Connectivity:**
  - HDMI, USB-C, USB 3.0 – Fast data transfer and external device support.
  - Wi-Fi 6 – Stable and fast wireless connectivity for better performance in crowded networks.

## Desktops

As we recover from the pandemic, many organizations report more in-person work, and some might be looking to upgrade their office desktops. We have outlined hardware recommendations that are likely to somewhat future-proof your choices.

### Storage:

- **1TB SSD** (minimum) for fast performance, reliable operation, and ample space for documents and projects.
- Add an optional **2TB PCIe Gen 4 or Gen 5 NVMe SSD** for enhanced speed or a **2TB HDD** for cost-effective storage of shared files, backups, or archives.

### Processor:

- **8 cores, 3.5 GHz or higher**, for strong multitasking and future-proofing.
  - Examples: **Intel Core i5 13th Gen or i7, AMD Ryzen 5 7600 or Ryzen 7 7700,** and **Apple M3 or newer.**

### RAM/Memory:

- **16 GB** (minimum) for seamless multitasking and handling more demanding applications.
  - Ensure the desktop supports **future upgrades to at least 32 GB** or more, with **64 GB** recommended for heavy multitasking or advanced use cases.

**Graphics (Optional):**

- **Integrated graphics** like **Intel Iris Xe** or **AMD Radeon 760M** are suitable for most office tasks.
  - For light design work or occasional multimedia editing, consider a dedicated GPU such as:
    - **NVIDIA RTX 3050** or **AMD Radeon RX 7600** for better performance.

**Monitor:**

- **24" Full HD monitors (1920x1080 resolution)** for sharp visuals and productivity.
- **Upgrades:**
  - **27" QHD (2560x1440)** for improved multitasking and visual clarity.
  - **4K monitors** for those requiring the highest resolution.
  - Consider **dual monitors** for enhanced workflow efficiency.
- Look for monitors with 120Hz or higher refresh rates for smoother visuals, especially for multimedia tasks.

**Ports:**

- **USB-C (3.0 or higher)** and **USB-A** for compatibility with peripherals.
- **HDMI 2.0** or **DisplayPort 1.4/2.1** for connecting high-resolution monitors.
- **Ethernet port** for stable wired internet access.

**Connectivity:**

- **Wi-Fi 6** or **Wi-Fi 6E** for faster, more stable wireless connections.
- **Bluetooth 5.2** or higher for smooth wireless peripheral integration.

**Additional Features to Prioritize:**

- **Webcam and Microphone:** Affordable external 1080p webcams like the **Logitech C920** or a newer model with higher resolution for quality video during remote meetings.
- **Energy Efficiency:** Look for **Energy Star-certified desktops** to minimize operational costs and reduce environmental impact.
- **Warranty and Support:** Opt for systems offering at least a **3-5 year warranty** to ensure reliability and peace of mind.



**Desktop Example Windows:** HP Envy Desktop PC \$999.99 <https://www.amazon.com/HP-Desktop-i7-14700-Graphics-TE01-5002/>

- **Processor:** Intel Core i7-14700 (20 cores, up to 5.0 GHz) – Powerful performance for multitasking, video editing, and other resource-heavy tasks.
- **Memory:** 32GB RAM – Ample memory for seamless multitasking and running multiple applications simultaneously.
- **Storage:** 1TB SSD – Fast boot times and plenty of space for large files, apps, and media.
- **Graphics:** Intel UHD Graphics 770 – Ideal for everyday tasks, media consumption, and light creative work.

- **Ports & Connectivity:**

- Multiple USB-A, USB-C, HDMI, Ethernet, and audio ports for versatile connectivity.
- Wi-Fi 6 and Bluetooth 5.2 for fast wireless connections.

💡 **Desktop Example MacOS:** Apple 2024 Mac Mini Desktop with M4 Chip \$939.00 <https://www.amazon.com/Apple-2024-Desktop-Computer-10>

- **Processor:** Apple M4 chip with 10-core CPU – Delivers exceptional performance for multitasking, content creation, and running demanding applications.
- **Graphics:** 10-core GPU – Provides smooth performance for graphic-intensive tasks like video editing and light gaming.
- **Memory:** 24GB unified memory – Ensures efficient multitasking and handles demanding applications with ease.
- **Storage:** 512GB SSD – Fast, reliable storage with ample space for files, apps, and media.
- **Connectivity:**
  - Gigabit Ethernet – Reliable wired network connection for fast and stable internet access.
  - USB-C, Thunderbolt 4, HDMI – Supports various peripherals, displays, and external devices.
  - Wi-Fi 6 and Bluetooth 5.3 – Seamless wireless connectivity.

💡 **Monitor Example:** LG 27QN600-B 27-Inch QHD Monitor \$206.00 <https://www.amazon.com/LG-27QN600-B-FreeSync-Virtually-Borderless/dp/B089NZCLHW>

- **Size:** 27 inches
- **Resolution:** 2560x1440 QHD
- **Refresh Rate:** 75Hz – Good balance of visual clarity and smoothness for productivity and entertainment.
- **Panel Type:** IPS – Vibrant colors and wide viewing angles.
- **Connectivity:** HDMI, DisplayPort
- **Features:** AMD FreeSync for smoother multimedia experiences, adjustable tilt.

**Dual Monitor Setup Option:** ASUS ProArt PA278CV 27-Inch QHD (Pair of 2) \$218.95 for power users who want enhanced productivity with a dual monitor configuration for multitasking <https://www.amazon.com/ASUS-PA278QV-DisplayPort-Anti-Glare-Adjustable/dp/>

- **Size:** 27 inches (2 monitors)
- **Resolution:** 2560x1440 QHD
- **Refresh Rate:** 75Hz – Suitable for productivity, multitasking, and media work.
- **Panel Type:** IPS – Accurate colors for design, photo editing, and professional work.
- **Connectivity:** HDMI, DisplayPort, USB-C
- **Features:** Factory calibrated color accuracy, ergonomic stand, tilt/swivel/height adjustability.

**Budget Monitor:** Acer 21.5 Inch Full HD IPS Ultra-Thin Zero Frame Monitor \$116.20

- **Size:** 21.5 inches – Compact size ideal for smaller workspaces or secondary monitors.

- **Resolution:** 1920x1080 Full HD – Clear and sharp visuals for everyday tasks and productivity.
- **Refresh Rate:** 75Hz – Smooth enough for general use, browsing, and multimedia.
- **Panel Type:** IPS – Rich, vibrant colors with wide viewing angles for consistent image quality.
- **Connectivity:** HDMI, VGA – Easy compatibility with a wide range of devices.
- **Design:** Ultra-thin, zero-frame bezel – Sleek and modern design for a more immersive viewing experience.

## macOS vs. Windows

When purchasing laptops or desktops, a key consideration is the operation system. A lot of the time, your choice will be guided by the system that is already in use within your organization. However, it is important to note that different operating systems provide different advantages and disadvantages and can be preferred for specific types of work. Below we will outline some of the considerations that can be applied when making a choice between macOS and Windows.

- **Cost:** Evaluate your budget and the upfront versus long-term value of the device.
- **Software Compatibility:** Ensure compatibility with your essential programs and peripherals (e.g., keyboards, mice, monitors).
- **Processing Power:** Match the device's performance to your needs, whether for basic office tasks or demanding workloads.
- **Storage Capacity:** Choose sufficient storage for your files, with a focus on SSDs for faster performance.
- **Device Durability:** Assess build quality and expected longevity.
- **Upgrade Potential:** Determine whether the device allows for hardware upgrades like RAM or storage.

Windows, powered by Microsoft, remains a leader in versatility and adaptability. The latest Windows 11 emphasizes productivity, offering features like Snap Layouts for multitasking, robust gaming capabilities via DirectStorage, and advanced security measures such as TPM 2.0 requirements.

### Pros:

- **Wide Software Range:** Compatible with diverse programs, including industry-specific and enterprise applications.
- **Frequent Updates:** Major updates are released twice a year, ensuring cutting-edge features and improvements.
- **Customizability:** Windows PCs support extensive hardware upgrades, allowing for flexibility and future-proofing.
- **Manufacturer Variety:** Multiple manufacturers (e.g., Dell, Lenovo, HP) provide options across price points and specifications.
- **Enterprise Features:** Ideal for businesses with large-scale IT infrastructure due to tools like Active Directory and Group Policy.

**Cons:**

- **Device Fragmentation:** With so many manufacturers, finding reliable support for a specific model can sometimes be challenging.
- **Learning Curve for Optimization:** For users who enjoy tinkering, Windows provides flexibility but requires a deeper understanding of software and hardware optimization.

Apple's macOS, featured on its MacBook, iMac, and Mac Studio devices, stands out for its tightly integrated ecosystem and consistent user experience. The introduction of Apple's M-series chips (M1, M2, and beyond) has redefined Mac performance, delivering industry-leading efficiency and speed.

**Pros:**

- **Streamlined Ecosystem:** Macs integrate flawlessly with other Apple devices (e.g., iPhone, iPad) for enhanced productivity.
- **Consistent Software Cycles:** Apple's annual updates are stable and reliable, with macOS optimized for the latest hardware.
- **M-Series Chips:** Apple's in-house chips (like the M2 Pro and M2 Max) ensure seamless performance and exceptional battery life, and they are optimized specifically for macOS.
- **Design Philosophy:** Macs feature premium build quality and user-friendly intuitive interfaces that minimize distractions.
- **Support Network:** AppleCare and Apple's global support offer consistent, high-quality troubleshooting.

**Cons:**

- **Limited Upgradeability:** Apple's designs prioritize sleekness, making post-purchase hardware upgrades nearly impossible. The specifications you choose at purchase will likely define the device's capabilities for its lifetime.
- **Higher Initial Cost:** Macs often come with a premium price tag, though their relative longevity can offset this investment.
- **Software Compatibility:** While macOS supports many mainstream applications, niche or industry-specific software may require workarounds or be unavailable.

So, which one is better? The truth is that both platforms excel in different areas. Your choice depends on your workflow, budget, type of work you need done, and preference for customization or seamless integration.

- **Choose Windows If You Need:**
  - Software compatibility with industry-specific or legacy applications.
  - Customizable hardware or upgrade options for longevity.
  - Enterprise-level IT management and integration.
  - A broad range of devices to fit any budget.
- **Choose Mac If You Need:**
  - Seamless integration with other Apple devices.
  - Premium design, long battery life, and user-friendly stability.



- Powerful performance for data analytics and creative tasks like video editing and graphic design.
- Simplified support and maintenance through Apple's unified system.

## Chromebooks

Chromebooks continue to grow in popularity, combining budget-friendly pricing with increasingly capable hardware. However, in most professional office environments, they are still not an ideal substitute for a Windows or Mac laptop.

Unlike Windows and macOS, Google's Chrome OS is designed around the Chrome browser and emphasizes web-centric applications, offering a streamlined and cost-effective experience. While the hardware requirements for Chrome OS are modest, Chromebooks have evolved significantly with better displays, improved processors, and longer battery life. Despite these advancements, Chromebooks have limitations that make them less suitable for professional environments requiring specialized software, extensive multitasking, or compatibility with enterprise-level applications.

### Recent Hardware Improvements in Chromebooks:

- **Processors:** Intel Core i3/i5, AMD Ryzen, and even ARM-based SoCs.
- **RAM and Storage:** Options with 8GB or 16GB RAM and 128GB or 256GB SSDs are available, addressing prior limitations in multitasking and local storage.
- **Displays:** High-end Chromebooks now offer QHD or 4K screens, along with touchscreen functionality and 2-in-1 designs for versatility.
- **Battery Life:** Many models provide 10-15 hours of battery life, suitable for long workdays or travel.

### Why we still do not recommend Chromebooks as laptop replacements:

- **Software Limitations:**
  - Most professional software (e.g., Adobe Creative Suite, full versions of Microsoft Office, and many industry-specific tools) either lacks compatibility with Chrome OS or offers web-based versions with limited features.
  - Although some Chromebooks support Linux and Android apps, these features can be inconsistent and lack the polish required for professional use.
- **Offline Functionality:**
  - While many apps now offer offline modes, Chromebooks are still heavily reliant on internet connectivity, which can be a drawback in scenarios where consistent internet access isn't available.
- **Enterprise Integration:**
  - Windows and macOS are better suited for integration into team IT environments, with broader support for security protocols, device management, and software ecosystems.
- **Performance for Demanding Tasks:**
  - Despite hardware improvements, Chromebooks remain less capable than Windows and Mac laptops for performance-intensive tasks like video editing and complex data analysis.

# SOFT-TECH RECOMMENDATIONS

## Computer Backup Software

### *Why might you need this?*

Protects files against data loss from hardware failure or theft. This tool is explicitly designed to prevent data loss and not for collaboration like syncing programs (like Google Drive.). You can install IDrive on all your laptops, desktops, and mobile devices and then not think about it- the tool will back up automatically. Once installed, users select folders and files to be backed up at user-specified times. Once installed, users select folders and files to be backed up at user-specified times. It's also a great choice for backing up your cloud data.

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### IDrive

**Website:** <https://www.idrive.com/>

**Cost:** IDrive offers a free version with 10GB of storage space. Its cheapest plan, IDrive Mini, starts at \$2.95 per year for 100GB of storage. IDrive Personal starts at \$99.50 per year for 5TB of storage. The service to back up Google Workspace and Microsoft 365 accounts costs \$20 per month.

**Compatibility:** Windows (7 and later), macOS (10.11 El Capitan and later), command-line-only for Linux; mobile clients for iOS and Android.

**Created:** 1995 as Pro Softnet Corporation; IDrive since mid-2003.

**Purpose:** Automated backup application that runs on Windows, Mac, iOS and Android. IDrive offers incremental and compressed backups, so users only upload modified portions of a backup file. Files may also be updated in real-time with a continuous backup option. Users can limit bandwidth usage during the backup process.

### Pros:

- Free local backup
- Unlimited devices per account
- Fully encrypted
- Fast upload speeds
- Inexpensive add-on for backups of Microsoft and Google accounts

**Support:** 24/7 live chat and phone support; email.

**Security:** IDrive uploads are encrypted using 256-bit AES encryption on transfer and storage. Multi-factor authentication. The IDrive data centers are located in the United States. They offer many physical security features, including smoke detection and fire suppression systems, motion

sensors, 24/7 secured access, video camera surveillance, and security breach alarms.

*Note: IDrive DOES NOT store your private encryption key on the servers. We recommend that you archive it safely for future use, as you will be unable to decrypt (restore) data backed up to IDrive without it.*

**Recommendation:** Periodically check your backup by downloading some files to ensure it is working correctly. Store a copy of critical files to Google Drive or Dropbox cloud service for redundancy and immediate backup. It's also a good idea to periodically create a local backup. This will prevent you from having to wait for a complete re-install and get you back up and going faster. It isn't helpful for daily backups or in the case of total loss or up-to-the-minute file recovery.

**Similar Tools:** Acronis, Backblaze, SpiderOak One Backup, iCloud (Mac only), Carbonite, Google Drive, DropBox, OneDrive

## Staff Communication

### *Why might you need this?*

*Quick communication is vital in a remote workplace. According to most experts, Slack is widely considered the best app for remote staff communication. It offers features like channels for team discussions, direct messaging, huddles to replace phone calls, and integrations with various other tools, making it suitable for small to medium-sized teams.*

### Slack

**Website:** <https://slack.com/>

**Nonprofit Discount:** Through Slack for Nonprofits, eligible organizations can apply for free or discounted upgrades for Slack's Pro and Business+ plans.

- Workspaces with up to 250 members can apply for a free upgrade for the Pro plan or an 85% discount for the Business+ Plan.
- Workspaces with more than 250 members can apply for an 85% discount for either the Pro or Business+ plan.

<https://slack.com/help/articles/204368833-Apply-for-the-Slack-for-Nonprofits-discount>

**Compatibility:** MacOS (12 or above), Windows (11 version 21H2 or above Windows Server 2016), Ubuntu (LTS releases 20.04 or above), Red Hat Enterprise Linux (9.0 or above). iOS (16 or above), Android (10 or above).

**Created:** 2013

**Purpose:** Channel-based messaging platform designed to communicate with staff, partners, funders, or vendors in channels or via direct messages.

**Pros:**

- Slack Huddles
- Cross-platform compatibility
- File sharing
- Easy to use and highly customizable
- Widely used in the progressive community
- Can be fun!

**Support:** <https://slack.com/help> or <https://listoshub.slack.com/help/requests> OnlineHelp Center, webinars

**Security:** Slack encrypts user data in transit and at rest using industry-standard protocols: TLS 1.2, AES256 encryption, SHA2 signatures, and FIPS 140-2 compliant standards. Slack has native data loss prevention (DLP) and supports third-party DLP providers. Other security features include Slack Enterprise Key Management (Slack EKM), Guest accounts, Email domain verification, and Deactivating accounts for users who no longer need access. <https://slack.com/trust/security>

**Recommendation:** Apply for the free nonprofit upgrade. To foster a sense of community in an online workspace, create channels for sharing anything from recipes to playlists to vacation photos. Set up integrations with Google Calendar, so people know when you're in a meeting, or OOO and Google Drive to make sharing documents easier. You can even start a FreshDesk support ticket or a Zoom meeting from Slack. Use reminders and customized notifications to stay focused.

**Integrations:** 2.6k integrations, including Google Suite, 1Password, Asana, Zoom, FreshDesk, Dropbox, and Calendly. Build custom apps with Slack APIs. <https://slack.com/integrations>

**Similar Tools:** Microsoft Teams, Discord, Google Chat, Gather

## Writing Support

### *Why might you need this?*

*A writing assistant helps users improve their writing by correcting mistakes, enhancing vocabulary, and providing suggestions for writing style.*

### Grammarly

**Website:** <https://app.grammarly.com/>

**Purpose:** Spelling and grammar checks on everything you write everywhere, including emails, Google Docs, Microsoft Office, websites, and more. Review the spelling, grammar, and tone of writing and identify possible plagiarism. It can also produce writing from prompts with its generative AI capabilities.

**Cost:** Grammarly offers a free version. Premium starts at \$12 per month <https://www.grammarly.com/plans>

**Nonprofit Discount:** Ended May 1, 2024 <https://support.grammarly.com/hc/en-us/articles/360054000712-We-no-longer-accept-applications-for-Grammarly-for-Nonprofits-and-NGOs>

**Integrations:** These are available as web tools, browser extensions, and apps, as well as Microsoft Office, Chrome, Outlook, and Google Docs.

**Created:** 2015

### Pros:

- Provides reports of weekly word usage, including the most common grammar fixes from the week and how to learn and avoid them in the future.
- Grammar and spelling suggestions, including tone and formality

**Support:** Articles, Support Requests <https://support.grammarly.com/hc/en-us>

**Security:** <https://www.grammarly.com/security> Grammarly uses generative AI: <https://www.grammarly.com/ai/responsible-ai> Grammarly strictly isolates user data, not selling it to third parties and implementing robust security measures like encryption, access controls, and regular vulnerability assessments, ensuring that user content remains private and protected while utilizing AI features to improve writing quality; users can also control whether their data is used to train Grammarly's AI models.

**Similar Tools:** ProWritingAid, Hemingway App, WhiteSmoke, WordTune

**Recommendation:** The free plan is sufficient for most users, but users who write a lot for large audiences, such as communications staff, may want the premium plan.

## Other Writing Resources

**Conscious Style Guide** - first website devoted to conscious language. Its mission is to help writers and editors think critically about using language—including words, portrayals, framing, and representation—to empower instead of limit.

**Website:** <https://consciousstyleguide.com/>

## Text Analytics

**Why might you need this?**

*Use it to analyze open-ended text and verbatim responses to turn them into actionable insights.*

### Fathom

**Website:** <https://www.fathomthat.ai/>

**Purpose:** Platform to understand any community in their own words. Helps researchers to bring strategic judgment and context-specific understanding to the analysis of open-ended data sets. LLM, in combination with ML, clustering algorithms, and proprietary models, maps themes and priorities associated with entrenched or emerging issues and unlocks sentiment data with nuanced, context-adaptive text analytics.

**Cost:** \$399/month or \$299/month for nonprofits. This includes the first 5000 text responses, with no monthly minimums and unlimited users. Additional text tokens are priced based on volume. A free trial is available.

**Contact:** Tovah Paglaro [tovah@fathomthat.ai](mailto:tovah@fathomthat.ai)

**Created:** Founded by Tovah Paglaro, and Michiah Prull in 2023

**Pros:**

- Data-driven answers
- Analyze unstructured text data

**Security:** <https://www.fathomthat.ai/privacy-policy>

## Scheduling

**Why might you need this?**

*Finding a meeting time that works for multiple people can be challenging, and doing this over email or DM can be time-consuming. Online schedulers allow the person (or persons) you're meeting with to pick a time that works best for them based on your calendar.*



## Calendly

**Website:** <https://calendly.com/>

**Cost:** <https://calendly.com/pricing>

**Created:** 2013

**Purpose:** Individual and team scheduling options via a cloud-based platform

**Nonprofit Discount:** Calendly offers a free version. Pricing starts at \$10 per month. Special pricing to qualified nonprofit organizations is available. Contact customer support specialists for details: [support@calendly.com](mailto:support@calendly.com)

**Integrations:** Google Calendar, Zoom, Zapier, Chrome & Firefox extensions, HubSpot, Salesforce, Slack and more <https://calendly.com/integration>

**Pros:**

- Black-owned business
- Team scheduling
- Multiple types of scheduling
- Various workflows for before and after meeting communication

**Support:** Resource Library, Help Center, Video Tutorials, Community

**Security:** <https://calendly.com/security>

**Recommendation:** Try the 14-day free trial and then try out the free version for another week. If you miss the paid features, the premium account should meet most of your team's needs. If you go with a paid version, have one person on your staff or team set up an initial account and add the others so that you can have event types that coordinate with all of your calendars. Ensure your availability is set to only when you want to meet. Integrating with Zoom and Google Calendar allows for seamless scheduling.

**Similar Tools:** Sprintful, Acuity Scheduling, Doodle, HubSpot Meetings

## Online Signature Collection

### Dropbox Sign

**Website:** <https://sign.dropbox.com>

**Cost:** starts at \$15/month <https://sign.dropbox.com/products/dropbox-sign/pricing>

**Nonprofit Discount:** Eligible nonprofits can save 25% on annual Dropbox Sign plans

**Created:** Originally HelloSign, merged with Dropbox in 2022

**Purpose:** Dropbox Sign eSignature accelerates electronic agreements, eliminates manual tasks, and makes connecting with the tools and systems you're already using easy.

**Pros:**

- Eliminates manual tasks such as printing of documents, physical signatures, and scanning back of completed forms
- Sign from anywhere, your computer or mobile device via the app
- Relatively easy to use
- Instant status availability- always know where your agreement is in the signing process.

- Ability to create custom fields to collect and track the most critical information to you or your organization.
- Creates an audit trail including IP address, email, time stamp and ensures the signer is authenticated

**Support:** Knowledge Base, Virtual Training

**Security:** <https://sign.dropbox.com/esignature-legality/united-states>  
<https://trust.dropbox.com/?product=dropboxsign>

**Integrations:** Google Workspace, Microsoft Office, Slack, Zapier & more

**Recommendation:** If you're going to use Dropbox Sign, we recommend reaching out to them directly to get a contract designed to fit your organization's needs. Ask about nonprofit and volume-based discounts.

**Similar Tools:** AdobeSign, DocuSign

## PDF Editor

*Why might you need this?*

*Worth the cost if you often have to fill out, edit, or create PDFs. We suggest the annual subscription to get a discounted rate.*

### Adobe Acrobat Pro

**Website:** <https://www.adobe.com/acrobat.html>

**Cost:** Adobe offers a free 14-day trial; \$12.99/month with an annual subscription for Standard and \$19.99/month for Pro.

**Nonprofit Discount:** <https://helpx.adobe.com/enterprise/using/non-profit.html>

**Individual Discount:** <https://www.adobe.com/nonprofits/apply.html>

**Created:** 1993

**Purpose:** Edit, Create, Convert, and Sign PDFs

**Pros:**

- Save on printing costs: paper, ink, and printer
- Comprehensive PDF editing features
- Create forms and collect signatures
- Multiple features available

**Integrations:** Dropbox, Google Drive, OneDrive, and other Adobe products

**Support:** User Guide, Tutorials, Chat Support

**Security:** <https://www.adobe.com/trust/security.html>

**Similar Tools:** Mac Preview, Nitro Pro, PDF Expert

## URL Shortener

*Why might you need this?*

<https://www.pcmag.com/how-to/your-business-needs-a-url-shortener>

*Tldr: URL shorteners generate links that are easier to share. They let small businesses track marketing campaigns and other incoming traffic.*

### Bit.ly

**Website:** <https://bitly.com/>

**Cost:** Free base version; use with upgrades starting at \$8/month <https://bitly.com/pages/pricing>

**Compatibility:** Web

**Created:** 2008

**Purpose:** Share links as neat, short URLs and measure where the clicks came from

**Pros:**

- The free version is robust
- Customizable link ending
- QR Codes, 2D barcodes
- Allows users to track engagement for URL

**Support:** Self-help Desk

**Security:** <https://support.bitly.com/hc/en-us/categories/360001889251-SSO-Security>

**Integrations:** HubSpot, Canva, Salesforce and more <https://bitly.com/pages/marketplace>

**Similar Tools:** Rebrandly, TinyURL, Dub

## Graphic Design

### Canva

**Website:** [canva.com](https://canva.com)

**Cost:** Canva offers a free version, paid offers start at \$120 per year [canva.com/pricing](https://canva.com/pricing)

**Nonprofit Discount:** You can apply for free Canva Pro: [Canva for Nonprofits](https://canva.com/nonprofits)

**Created:** 2011

**Purpose:** Free-to-use online graphic design tool. You can use it to design engaging posters, posts, videos, and presentations for your social media, marketing, and educational purposes.

**Pros:**

- You can create engaging designs with the free version- no purchase is required
- The interface is easy to navigate, and people with little to no design experience can create
- Numerous templates that are made to scale for the purpose you intend to use them for
- Has Brand Kit features to ensure all your designs are using the same colors and elements (Canva Premium)
- Many fonts and colors are available

- Ability to upload your own images or use theirs
- Robust and uncomplicated AI

**Support:** ‘Learn’ section with tutorials, blogs, and courses; Help Center with multiple subjects. Ability to submit questions through a contact form

**Security:** Password-protected

**Integrations:** Can integrate with Facebook and Instagram to post your creations and schedule posting (versus downloading your image and uploading it separately into each tool). Full list of integrations: <https://www.canva.com/your-apps/>

**Recommendation:** The additional access to elements, photos, and features is worth the price for your organization, even if you can’t get it free as a nonprofit.

**Similar Tools:** Simplified, Adobe Express, Snappa, Pixlr

## Flow Chart Maker

### *Why might you need this?*

*You might need a tool like this if you want a simple, visually appealing way to collaborate on brainstorming ideas, create quick wireframes, design flowcharts, mind maps, and sticky notes with your team, particularly when you need to visualize complex concepts and facilitate real-time collaboration quickly. It’s ideal when you need a quick diagramming solution or must rapidly sketch out and share your ideas without getting bogged down in intricate design details.*

## Whimsical

**Website:** <https://whimsical.com/flowcharts>

**Purpose:** Whimsical is a visual iterative workspace application from the company of the same name in Denver, allowing users to create collaborative wireframes, mindmaps, flowcharts, and sticky notes.

**Cost:** Whimsical offers a free version for individual work. The pro version starts at \$10 per month and includes expanded functionality, AI actions, and guests. <https://whimsical.com/pricing>

**Contact:** <https://whimsical.com/company/contact-sales>

**Created:** 2017

### **Pros:**

- Intuitive interface that is easy to navigate
- Real-time collaboration
- Supports mind maps, flowcharts, wireframes, sticky notes and more
- Extensive template library
- Free version available

**Integrations:** Jira, Google Docs, Asana, Notion, Trello, Slack, Zendesk and more <https://help.whimsical.com/integrations>

**Security:** In addition to the standard e-mail/password authentication and Google SSO, they also support SAML 2.0-based authentication, both IdP and SP-initiated logins, and TOTP 2FA authentication.

**Support:** Support Center with various articles and tutorials, Community forums, and email support  
<https://help.whimsical.com/> <https://community.whimsical.com/>

**Similar Tools:** Miro, Canva, Figma, Lucid Visual Collaboration Suite

## Task Manager

### Asana

**Website:** <https://asana.com/>

**Cost:** Asana offers a free version. Pricing starts at \$10.99 per month if billed annually;  
<https://asana.com/pricing>

**Nonprofit Discount:** Not for political or advocacy organizations. 50% off annually for Premium or Business subscriptions: <https://www.techsoup.org/asana-details>

**Integrations:** <https://asana.com/apps?category=all-apps> Notably: Slack, Tableau, Microsoft Office 365, Gmail, Chrome Extension, Freshdesk, Mobile app, Dropbox, GitHub

**Created:** 2011

**Purpose:** Project management software, specially helpful for distributed teams

**Pros:**

- Free Version: automated reminders for tasks; project templates available; easily track project progress; log, review, and report out on completed tasks
- Paid Version: create dependencies and relationships between tasks and projects; multiple views to suit different style preferences; public-facing forms to submit requests and tasks; workflows and automations

**Support:** User Guide, Asana Academy Courses & Webinars, Forum, Support Articles

**Security:** <https://asana.com/guide/help/faq/security>

**Recommendation:** The free version works great for small teams. Larger teams, remote teams, and those with many concurrent projects may benefit from Asana Premium.

**Similar Tools:** Trello, EverNote, AirTable, Productive, Jira, Teamwork

**\*Personal\* Task Managers:** Things 3 (Mac), ToDoist (web/Mac/iOS/Android/Windows)

## Multipurpose Tool: AirTable

### *Why might you need this?*

*Airtable is a versatile platform that blends the simplicity of a spreadsheet with the power of a database, making it an ideal solution for organizing, managing, and collaborating on data. Whether you're tracking projects, planning events, managing customer relationships, or coordinating a team, Airtable adapts to your needs with customizable fields, intuitive interfaces, and multiple visualization options like calendars, kanban boards, and Gantt charts. Its real-time collaboration features, integrations with popular tools, and scalability make it a go-to choice for individuals and organizations seeking a user-friendly and flexible solution to streamline their workflows.*

**Website:** <https://www.airtable.com/>

**Purpose:** Airtable is a low—code cloud-based platform for creating and sharing relational databases, allowing you to build custom apps. It is often utilized as a collaborative project-management platform that combines spreadsheet and database elements.



**Cost:** AirTable offers a free version that is good for individuals or very small teams; team plans start at \$20 per seat per month. <https://airtable.com/pricing>

**Contact:** <https://www.airtable.com/contact-sales>

**Created:** 2012 by Howei Liu, Andrew Ofstad, and Emmet Nicholas.

**Pros:**

- Combines the familiarity of spreadsheets with the capabilities of a database
- 100+ pre-built templates
- A range of customizable views
- Data visualization tools can be added as extensions
- Real-time collaboration

**Integrations:** 1200+ integrations <https://www.airtable.com/integrations> and options for custom integrations <https://support.airtable.com/docs/options-for-integrating-with-airtable>

**Security:** Access restriction to Airtable views through password-protected share links or email domains. Record-level revision history that shows a visual activity feed of the changes made to each record. Two-factor authentication (2FA) for your account if you're using password-based authentication. All data you enter into Airtable remains yours. Airtable's data is encrypted both when it is sent to and from servers and when it is at rest. Airtable uses 256-bit SSL/TLS encryption to protect your content in transit. At rest, Airtable content is protected using 256-bit AES encryption. <https://www.airtable.com/company/trust-and-security> <https://support.airtable.com/docs/airtable-security-practices>

**Support:** Airtable offers a Help Center, Airtable Academy, Airtable Community, Guides, and services to partners. You can contact Airtable support via chat or email <https://support.airtable.com/docs/contacting-airtable-support>

**Similar Tools:** Baserow, Smartsheet, Notion, Trello, Asana, Google Sheets

## Data Entry Vendor

### *Why might you need this?*

*You have collected information on paper at events or in the field and don't have any staff or volunteers available to enter that data for you.*

### Blue Prism

**Website:** <https://www.blueprism.com/>

**Contact:** <https://www.blueprism.com/contact/?prev=https%3A//www.blueprism.com/customers/for-our-customers/>

- **Cost:** Custom, free trial available: <https://www.blueprism.com/free-trial/>
- **Nonprofit Discount:** Contact Sales

**Created:** 2011, Acquired by SS&C Chorus in 2021

**Purpose:** Platform for reading, enriching, and delivering data from paper.

**Pros:**

- Great for automating the data entry process of any program
- Uses AI to assist in the reading and digitization of on-paper handwriting

- Customer UI has a lot of functionality and even allows you to compare templates and overlay documents and templates to find pain points or just to compare

**Security:** <https://www.blueprism.com/blue-prism-security/>

**Support:** Knowledge base, Tutorials, FAQs, Customer Support Representative

**Similar Tools:** There are many data entry vendors available, but State Voices only has experience with this one.

# DIGITAL SECURITY & PRIVACY

## Virtual Private Network

### *Why might you need this?*

According to [CNET](#), a Virtual Private Network (VPN) enhances your online security and privacy by encrypting your internet connection and masking your IP address. This encryption safeguards your data from potential hackers, especially when using public Wi-Fi networks. Additionally, VPNs allow you to bypass geo-restrictions, granting access to content that may be unavailable in your region. By routing your traffic through a secure server, a VPN ensures that your online activities remain private and protected from prying eyes. However, VPN only disguises your traffic to some third parties. A VPN will not stop services like Google or Amazon from recognizing you, and VPNs cannot stop invasive data fingerprinting or web tracking technologies. VPN is one of the essential tools you can use to protect your digital privacy.

### TunnelBear

**Website:** <https://www.tunnelbear.com>

**Purpose:** TunnelBear is a VPN service that encrypts your internet traffic and routes it through a server in another location. This can help protect your privacy and security online and unblock websites and restricted streaming services in your region.

**Cost:** TunnelBear offers a free version with 2GB of monthly data. Paid plans start at \$3.33 per month, and there are options for Team plans. <https://www.tunnelbear.com/pricing>

**Created:** Created in 2011 by Gabriel Weinberg and Ryan O'Connor.

#### Pros:

- User-friendly interface that makes it easy to get started.
- Strong encryption and a no-logs policy to protect your privacy.
- Unlimited simultaneous connections
- Annual independent audits

**Integrations:** Integrates with a number of popular services, including Google Chrome, Firefox, and Opera. It also integrates with a number of password managers, such as LastPass and 1Password

**Support:** 24/7 live chat support, email

**Security:** <https://www.tunnelbear.com/privacy-policy>

**Similar Tools:** ProtonVPN, Surfshark, NordVPN, Privado VPN

## Two Factor Authentication (2FA)

### *Why might you need this?*

Two-factor authentication prevents your account from being taken over by a password breach because it requires both your password and a one-time code to log in. It's more secure than SMS authentication because, with SMS authentication, there is a risk of your text message being intercepted.

### **Authy**

**Website:** <https://authy.com/>

**Cost:** Free

**Compatibility:** iOS or Android

**Created:** 2012

**Similar Tools:** Google Authenticator, 2FAS, Aegis Authenticator

## Personal Data Removal Service

### *Why might you need this?*

Personal information such as name, address, family relationships, email, and phone number is available via data brokers on the Internet. Data Removal Services remove these listings.

### **DeleteMe**

**Website:** <https://joindeleteme.com/>

**Cost:** <https://joindeleteme.com/privacy-protection-plans/>

**Nonprofit Discount:** N/A

**Compatibility:** Web

**Created:** 2011

**Purpose:** Remove personal information from the internet to protect you against identity theft or harassment.

### **Pros:**

- Does the work for you so you don't have to request from each site individually
- Continuously scans for new information
- Offers a free guide to remove data yourself
- Users can make custom removal requests

**Support:** HelpDesk, Phone, Email <https://help.joindeleteme.com/hc/en-us>

**Security:** [joindeleteme.com/help/kb/trust-the-deleteme-team](https://joindeleteme.com/help/kb/trust-the-deleteme-team)

**Similar Tools:** Privacy Bee, Optery, incogni, IDX Complete

## Password Manager

### *Why might you need this?*

A password manager can generate passwords, save them for later, and securely share passwords with coworkers.

## 1Password

**Website:** <https://1password.com/>

**Cost:** starts at \$2.99/month with annual subscription <https://1password.com/pricing>

**Nonprofit Discount:** <https://1password.com/for-nonprofits/>

**Compatibility:** Mac, Windows, iOS, Android

**Created:** 2005

**Purpose:** Generate random, secure passwords, share passwords securely, as well as autofill them in your web browser

### Pros:

- Create strong, randomly generated unique passwords
- Share passwords securely with staff or a team
- Receive alerts for compromised websites and vulnerable passwords
- 2-factor authentication
- Secure document storage

**Support:** HelpDesk, KnowledgeBase, Forums, Email

**Security:** <https://1password.com/security/>

**Similar Tools:** LastPass, BitWarden, NordPass, Dashlane

## Browser Add-Ons

You'll want to install privacy and ad-blocking extensions for your web browser. These can prevent your browser (and computer by extension) from being exploited or downloading viruses via malicious code. Additionally, we recommend some privacy configurations below.

Major browsers now offer native support for an HTTPS-only mode- that makes your browser default to the secure version of a website, protecting your information from interception by a third party. You no longer need an add-on for that. Learn how to set up HTTPS by default in your browser: <https://securityplanner.consumerreports.org/tool/install-https-everywhere>

## UBlock Origin

<https://ublockorigin.com/>

A free, open-source content blocker that efficiently blocks ads and trackers, reducing CPU and memory usage. It's compatible with browsers like Chrome, Firefox, Edge, and Opera.

## Privacy Badger

<https://privacybadger.org>

Developed by the Electronic Frontier Foundation, this extension automatically learns to block invisible trackers, enhancing your privacy without requiring manual configurations.



**Ghostery**

<https://www.ghostery.com/>

This tool blocks trackers and ads, providing insights into who is tracking your data. It offers configurable levels of blocking and is available across various browsers.

**DuckDuckGo Privacy Essentials**

<https://duckduckgo.com/app>

This extension offers private search, tracker blocking, and encryption enforcement, providing a comprehensive privacy solution within your browser.

**Unshorten.link**

<https://unshorten.link/>

This extension expands shortened URLs, revealing the full destination link and alerting you to potential malicious sites, thereby protecting you from phishing and malware.

**Cloaked**

<https://www.cloaked.com>

Offers virtual identities to protect your privacy online, allowing you to manage and control your personal information across different platforms.

**Plasmo**

<https://www.plasmo.com>

A platform that streamlines the development of browser extensions, allowing developers to focus on shipping products efficiently

# FREE DOWNLOADS

## Archiving & Compression

### *Why might you need this?*

Creating compressed files that take up less space on your hard drive and opening compressed files

**Windows:** 7-Zip <https://7-zip.org>

**Mac:**

- Archive Utility included in Mac OS
- Keka <https://www.keka.io/en/>

## Digital Scanner/PDF Creator

### *Why might you need this?*

This is a mobile application to scan documents using your phone camera. This allows you to create a digital copy of a paper document without having to use a physical scanner.

**Adobe Scan:** <https://www.adobe.com/acrobat/mobile/scanner-app.html>

## PDF Reader

### *Why might you need this?*

PDF is a popular document format. To view a PDF, you need a PDF Reader app.

**Adobe Acrobat Reader:** <https://www.adobe.com/acrobat/pdf-reader.html>

## Screen Recorder

### *Why might you need this?*

Record your desktop is helpful for recording training or for bug reporting.

**Windows:** Built into OS <https://www.microsoft.com/en-us/windows/learning-center/how-to-record-screen-windows-11>

**Mac:** Built into OS <https://support.apple.com/en-us/102618>

## Text Editor

### *Why might you need this?*

Text editors are useful for cleaning up and standardizing messy data.

**Windows:** Notepad ++

**Website:** <https://notepad-plus-plus.org/downloads/>

**Mac:** TextMate

**Website:** <https://macromates.com/>

# ACCESSIBILITY

On July 16, 2024, the CDC released its [annual update](#) to the [Disability and Health Data System \(DHDS\)](#). This provides quick and easy online access to state-level health data on adults with disabilities. According to the latest data, more than 1 in 4, (over 70 million adults in the United States) reported having a disability in 2022.

When examining disability status by race/ethnicity, the groups with the highest prevalence (both 38.7%) identified as American Indian or Alaska Native and Other/Multirace. Minorities and communities of color are consistently underserved and under-represented, creating an accessibility gap. Implementing accessibility technology will help us bridge that gap. It doesn't have to be complicated or expensive. Many of the tools and resources featured here are free and open to anyone.

According to the [Detroit Disability Power](#): “...mainstream American culture tends to think about disability as an individual medical experience, we understand it more as a collective social, economic and relational experience. There are often medical aspects to people with disabilities experience, but for most people, social aspects, such as stigma, discrimination, and resulting isolation are far more impactful. For example, recent studies show that 19% of people with disabilities are employed, compared to 66% of non-disabled people. It is not that 80% of disabled people cannot work, but that it is harder to get past discrimination in the hiring process and to get the accommodations required to maintain employment (like accessible transportation or workspaces, ASL interpretation, etc.). The good news is that we can undo ableist structures that create this culture of oppression and replace them with a culture of revolutionary inclusion that doesn't just benefit disabled people, but everyone!”

They further explain that many social justice activists and organizers have a balanced and healthy analysis of current race, gender, and class dynamics. However, because many non-disabled people never have to think about access or accommodation, they can be unaware of the needs of others by *Ableism*- the systematic oppression of disabled people, operating at personal, interpersonal, institutional, and cultural levels. We hope the resources below will help you better understand various types of accessibility technology and ways to implement it.

## Common Types of Accessibility Technology:

- **Colorblindness-friendly color schemes**
  - Use color palettes that differentiate elements effectively for colorblind users (e.g., avoiding reliance solely on red/green)
  - Software that supports High-Contrast Mode- settings that enhance text and interface contrast for users with low vision
- **Accessible fonts & design**
  - Use fonts that are easy to read (e.g., sans-serif fonts like Arial or Verdana) and consider spacing, contrast, and layout for readability.

- **Multiple modes of training material**
  - Provide content in varied formats, such as written text, audio, video, and interactive elements, to accommodate diverse learning preferences and needs.
- **Limited Use of Gifs in Presentations**
  - These can be very distracting to neurodivergent people, limiting their ability to focus on the presentation itself
- **Screen-readers & screen enlargement tools**
  - Assistive software like JAWS or NVDA for screen readers and magnification tools for those with low vision remain crucial.
- **Braille signage**
  - Tactile writing systems like Braille for physical navigation and labeling are still vital for blind individuals.
- **Sign language interpreters for in-person events.**
  - Offering interpreters (e.g., ASL in the U.S.) at events to ensure accessibility for Deaf and hard-of-hearing attendees.
- **Audio descriptions in videos**
  - Narrations describing visual elements for those who are blind or visually impaired, enhancing comprehension of video content.
- **Captioning for videos**
  - Essential for Deaf or hard-of-hearing viewers and beneficial for non-native speakers or those in noisy environments.
  - Real-time transcription services or speech-to-text tools, such as Otter.ai, for live transcription of conversations or events.
- **Voice recognition software**
  - Tools like Dragon NaturallySpeaking allow users to control devices and dictate text with voice commands.
- **Height-adjustable desks and workstations**
  - Ergonomic furniture accommodating wheelchairs or various seating needs.

## Additional Resources

- **Detroit Disability Power's Social Justice Access Toolkit:** <https://www.detroitdisabilitypower.org/social-justice-toolkit>
- **Job Accommodation Network:** <https://askjan.org/a-to-z.cfm>
- **Accessibility Resource List:** [docs.google.com/document/accessibility](https://docs.google.com/document/accessibility)
- **Creating An Accessible Workplace:** <https://www.themuse.com/advice/how-to-create-an-accessible-workplace>
- **Creating Accessible Documents:** <https://aem.cast.org/create/creating-accessible-documents>
- **Creating Accessible Campaigns:** <https://www.inclusivecampaigns.org>

- **MEpedia:** [https://me-pedia.org/wiki/Welcome\\_to\\_MEpedia](https://me-pedia.org/wiki/Welcome_to_MEpedia)
  - MEpedia is a project founded by [The MEAction Network](#), powered by the patient community, and built by volunteers including patients, students, and researchers. It is a crowd-sourcing knowledge base on the history, science, and medicine of [ME](#), [CFS](#), and [related diseases](#).
- **WCAG (Web Content Accessibility Guidelines) Resource Hub:** <https://www.w3.org/WAI/standards-guidelines>
  - Provides guidelines for making web content more accessible to people with disabilities. Updated regularly.
- **Global Accessibility Awareness Day (GAAD) Toolkit:** <https://globalaccessibilityawarenessday.org/resources/>
- **Microsoft Accessibility Features:** <https://www.microsoft.com/en-us/accessibility>
- **Apple Accessibility Resources:** <https://www.apple.com/accessibility/>
- **WebAIM (Web Accessibility In Mind):** <https://webaim.org>
- **Captioning Guidelines by the Described and Captioned Media Program (DCMP):** <https://dcmp.org/learn/5-captioning-guidelines-for-the-dcmp>
- **Accessible PDFs by Adobe:** <https://www.adobe.com/trust/accessibility.html>

## Colorblindness

### Why is this important?

Colorblindness affects around 8% of men and 0.5% of women globally, limiting their ability to distinguish certain colors. To accommodate them, use high-contrast designs, textures, or patterns in addition to color, and choose colorblind-friendly palettes (e.g., avoiding red/green combinations). This improves usability and ensures no one is excluded from accessing critical information.

## Recommendations

Ensure your color scheme is differentiated enough to be clear regardless of color perception. Steer clear of color combinations such as green and red or blue and yellow, as these can pose challenges for individuals with colorblindness. You can use a color contrast check and use patterns, symbols, proportions, and labels to make your graphics clearer and easier to understand. Additionally, remember to provide an image description and alternative text for graphics and images to ensure colorblind and low-vision people can consume the content.

## Color Contrast Checkers

- **WebAIM:** <https://webaim.org/resources/contrastchecker/>
  - A user-friendly tool that allows you to input foreground and background colors to assess their contrast ratio.
- **Color Contrast Checker:** <https://coolers.co/contrast-checker/112a46-acc8e5>
  - An online tool that calculates the contrast ratio between text and background colors, providing immediate feedback on accessibility compliance

## Color-blind friendly color Schemes

- <https://jacksonlab.agronomy.wisc.edu/15-level-colorblind-friendly-palette/>
  - 15-level palette for people with deuteranopia<sup>1</sup> or protanopia<sup>2</sup>, it resolves into shading series of black, yellow, and blue, which is pretty neat.
- <https://davidmathlogic.com/colorblind>
  - Simulate what your chosen color palette looks like to viewers who are colorblind.

## High Contrast Interface

- **Windows:** <https://support.microsoft.com/en-us/windows/change-color-contrast-in-windows>
- **Mac:** <https://support.apple.com/lv-lv/guide/mac-help/unac089/mac>

## Dyslexia/Dysgraphia

### Why is this important?

*In the United States, dyslexia affects between 5% and 15% of the population, or around 14.5 to 43.5 million people. However, only about 1 in 5 students with dyslexia receive appropriate support and accommodations in schools. Dyslexia and Dysgraphia affect the way your brain processes text-based information. The principles of making text-based communication clearer will benefit everyone consuming your content.*

### Recommendations

Some simple accommodations are to use clear navigation and headings, keep text spacing wide, use accessible fonts, and make text bigger. Prioritize clear, concise language with short sentences and paragraphs, use headings and bullet points to break up text, and avoid complex sentence structures. Keep your layout consistent, make required fields clearly marked, and use symbols and icons in addition to text when possible. Make sure to use both patterns and colors to represent data on a chart or graphic. Enlarged San Serif fonts are the easiest to read. Text to Speech tools can be helpful for some people with dyslexia.

### Accessible Fonts

<https://pixelplex.io/blog/choosing-the-right-font-and-its-presentation/>

**OpenDyslexic:** <https://opendyslexic.org>

- A free, open-source typeface designed to mitigate common reading errors associated with dyslexia by incorporating unique letter shapes and heavy-weighted bottoms.

**Dyslexie:** <https://dyslexiefont.com/>

- Created by Christian Boer, this font enhances readability through distinct letterforms and increased spacing, aiming to reduce letter confusion and improve reading fluency.

<sup>1</sup> **Deuteranopia** is a type of red-green color blindness where the green cones in the eye are missing or non-functional. This results in difficulty distinguishing between red and green hues, often making greens appear more like reds or be perceived as duller shades.

<sup>2</sup> **Protanopia** is another type of red-green color blindness, but in this case, the red cones are missing or nonfunctional. People with protanopia struggle to differentiate between red and green, with reds appearing darker or even as shades of brown or gray.



## Dyscalculia

### Why is this important?

Dyscalculia is a learning difference that affects numerical processing, making tasks involving math, time management, and data analysis more challenging. It is estimated to affect approximately 5% to 8% of the U.S. population. This prevalence is comparable to that of dyslexia, yet dyscalculia often remains underdiagnosed and less recognized. Between approximately 16.5 million and 26.5 million individuals may be affected by dyscalculia nationwide.

### Recommendations

Accommodations, such as digital tools, extra time for math-based tasks, and clear visual representations of data, create an inclusive environment where people can live to their full potential. Providing accommodations ensures that people with dyscalculia can navigate their environment independently and with confidence. For example, using clear visual symbols alongside numbers can make information more accessible. Digital payment options, automated calculators, and voice-assisted kiosks can help individuals complete transactions without relying on mental math. Making spaces dyscalculia-friendly reduces barriers to numerical data.

- **Provide accessible calculation tools**
  - Offer access to digital calculators, spreadsheet templates, and math-assistive software. It can also be helpful to allow speech-to-text tools for numerical tasks.
- **Use clear, visual data representations**
  - When presenting numerical information, use charts, graphs, and visual aids instead of dense tables of numbers. Color-coding or labeling important figures can improve comprehension.
- **Allow extra time for math-related tasks**
  - People with dyscalculia may require additional time to complete tasks that involve calculations, data entry, or financial management.
- **Offer alternative time management strategies**
  - Difficulties with reading clocks, estimating time, or scheduling can be common. Digital planners, visual timers, and reminder apps can help people stay on track with appointments and important dates.
- **Minimize the need for mental math**
  - If discussions involve numerical reasoning, allow people to take notes, use calculators, or review figures in advance rather than expecting quick mental calculations on the spot.
- **Use dyscalculia-friendly training methods**
  - Provide step-by-step written guides, real-world examples, and interactive learning options rather than relying solely on numerical instructions. Training should be structured in a way that reduces math-related anxiety.

**Dyscalculia.org:** <https://www.dyscalculia.org>

- Offers a curated list of math tools designed to assist individuals with dyscalculia. These include creative tools for lessons, math visualization aids, manipulatives, and problem-solving resources.

**Dyscalculia Network:** <https://dyscalculianetwork.com>

- A leading network dedicated to supporting adults with dyscalculia, the Dyscalculia Network provides expert advice, resources, and a community for individuals seeking assistance.

**Discovering Dyscalculia:** <https://discoveringdyscalculia.com>

- This platform offers insights and resources for adults, including information on neuropsychological assessments to better understand individual learning profiles.

## Visual Impairment

### *Why is this important?*

*According to estimates from the 2022 National Health Interview Survey, 50.18 million American Adults aged 18 and older reported experiencing some degree of vision loss. Of these, 3.89 million adults have a lot of trouble seeing, even when wearing glasses, and 340,000 cannot see at all. Below are tools that make technology more accessible for people with visual impairments.*

### **Recommendation**

Follow Web Accessibility standards to ensure websites and digital materials are screen-reader compatible and have sufficient color contrast. Use audio descriptions for visual content and provide auditory prompts for navigation or important updates. For in-person settings, maintain consistent furniture layouts to aid navigation and avoid creating unexpected obstacles. Incorporate Braille on signage, elevators, and frequently used equipment to facilitate independence. Simple tools like rubber bands or textured labels can help differentiate items such as pens, water bottles, or folders. Additionally, tactile maps or guides for larger spaces should be provided.

## Screen Reader

Text-to-speech allows people with visual impairments to navigate digital tools by converting content on the screen into audio.

## Built-in Text to Voice Tools

**Windows:** Narrator

<https://support.microsoft.com/en-us/windows/complete-guide-to-narrator>

**Mac:** Voice Over

<https://www.apple.com/accessibility/vision/>

### **Similar Tools**

**NV Access:** <https://www.nvaccess.org/download/>

- Free and open-source, portable screen reader for Microsoft Windows

**Read Aloud Browser Extension:** <https://readaloud.app>

Free extension for Chrome, Firefox, and Edge to read web content aloud.

## Audio Descriptions

### Why is this important?

Audio description makes videos accessible to people who are blind or have low vision by describing aloud the visual elements of the video as part of the audio track. The simplest way to accomplish this is to build in descriptions. Instead of saying “click here” in a video, be specific about your actions on the screen; for example, “click the Submit button.” Two options are used to ‘speak’ audio descriptions: Human or synthetic voice. Human voice is spoken and recorded by a voice artist, while synthetic voice is computer-generated. While the human voice has remained essentially the same for many years, synthetic voice technology has advanced dramatically in the past half-decade. As a result, audio description is now easier and more scalable than ever.

### Additional Resources:

- **Implementing audio description:** <https://accessibility.huit.harvard.edu/audio-description>
- **A decision tree that describes how to use the alt attribute of the <img> element in various situations:** <https://www.w3.org/WAI/tutorials/images/decision-tree/>
- **Google alt text:** <https://support.google.com/docs/answer/6199477>
- **PowerPoint alt text:** [https://support.microsoft.com/en-us/office/make-your-powerpoint-presentations-accessible-to-people-with-disabilities-6f7772b2-2f33-4bd2-8ca7-dae3b2b3ef25#bkmk\\_macalttext\\_365](https://support.microsoft.com/en-us/office/make-your-powerpoint-presentations-accessible-to-people-with-disabilities-6f7772b2-2f33-4bd2-8ca7-dae3b2b3ef25#bkmk_macalttext_365)
- **Keynote alt text:** [https://pressbooks.library.torontomu.ca/docs/chapter/keynote/#Technique\\_6\\_Provide\\_Text\\_Alternatives\\_for\\_Images\\_and\\_Graphical\\_Objects](https://pressbooks.library.torontomu.ca/docs/chapter/keynote/#Technique_6_Provide_Text_Alternatives_for_Images_and_Graphical_Objects)
- **Alt text for Instagram:** <https://www.perkins.org/resource/how-write-alt-text-and-image-descriptions-instagram/>

## Voice Recognition

### Why might you need this?

Speech-to-text and other voice recognition technology is a vital accessibility tool that enables individuals with disabilities, such as mobility impairments, visual impairments, or learning differences, to interact with devices and complete tasks hands-free. It allows users to dictate text, control devices, and navigate digital content using spoken commands, promoting independence and reducing physical strain.

### Built-in Voice-to-Text

- **Windows:** <https://support.microsoft.com/en-us/windows/use-voice-typing-to-talk-instead-of-type>
- **Mac:** Dictation <https://support.apple.com/lv-lv/guide/mac-help/mh40584/mac>
- **Google Docs Voice Typing:** <https://support.google.com/docs/answer/4492226?hl=en>

Modern mobile devices have built-in voice assistants like Apple Siri, Microsoft Cortana, and Google Assistant.

## Screen Enlargement

### Why might you need this?

Screen enlargement tools are critical for individuals with visual impairments or low vision. They enable them to magnify on-screen content for better readability and accessibility. These tools also allow users to customize display settings, zoom into specific areas, and adjust text and interface sizes, ensuring an inclusive digital experience.

- **Windows:** Magnifier <https://support.microsoft.com/en-us/windows/make-windows-easier-to-see>
- **Mac:** Zoom Tool
- <https://support.apple.com/lv-lv/guide/mac-help/mh40579/mac>
- **Microsoft Edge and Chrome Zoom Features:** Both browsers allow users to adjust the zoom level for web pages without additional software. Simple keyboard shortcuts (e.g., Ctrl + “+” or Ctrl + “-”) to increase or decrease magnification.

## Hearing Impairment

### Why is this important?

Visual communication is helpful for people who are deaf or hard of hearing. While captioning and sign language interpretation are very useful, low-tech options such as text messaging and simple pen and paper are also helpful if other resources aren’t available. Accessibility tools for individuals with hearing impairments provide solutions for effective communication, content consumption, and engagement in both digital and in-person environments. These tools often include visual and text-based alternatives to audio, ensuring inclusivity.

## Video Captioning

Adding captions to videos is the simplest way to make spoken digital communication accessible. There are many types of captioning, from automatic options to more advanced professional services. Captions offer advantages to individuals who are Deaf, hard of hearing, non-native speakers of the event’s language, as well as those engaged in multitasking, such as caregiving. One of the most significant benefits of captioning arises when it generates a comprehensive transcript post-event, which can be shared or leveraged to enhance accessibility further. There are two types of captioning: Closed-captions and Open-captions. Closed captions are captions that can be toggled on or off while watching a program or media. In contrast, open captions are captions that are permanently integrated into the program or media.

## Live Captioning

According to the [Detroit Disability Power](#), CART (Communications Access Realtime Translation) is captioning done in real-time by a human, either in person or remotely/online. The text can be displayed for a large audience in person, online, or privately for individuals needing the service. CART services can cost between \$110 and \$300/hour. For high-quality, accurate captioning, it’s recommended to choose a certified CART captionist from a reputable agency.

**Recommendation:** Although CART can be expensive if organizations do not budget ahead of time, having a very accurate transcript of an auditory event is priceless. Human captioners can also ask the participants to make adjustments, such as speaking slower, clearer, or louder.

**Scheduling Tips:** CART providers are typically arranged 1-2 weeks in advance. Provide a list of terms or materials ahead of time to CART providers so that they can program their machines to account for preferred terms and feel prepared to capture the content to the best of their abilities.

While it's always going to be better to have an interpreter or real-time translator, a number of tools can fill in the gaps. Notably, Zoom has added a live transcript feature that provides real-time voice-activated closed captioning in meetings and webinars. To support automated captioning for languages other than English, like Arabic, Chinese, Dutch, French, and more, install the [Zoom desktop client version 5.14.0 or higher](#). Zoom-translated captions enable users to have the speech in a meeting or webinar automatically translated in real-time to captions in another language. For example, if the speaker is speaking English in a meeting, captions can be made available in Spanish, Chinese, Ukrainian, and more.

The host determines the available caption languages in web settings before the live session, but participants can freely enable captions and select the language they want to use for translation without the host's help.

*Note: Translated captioning requires the host to be a member of a Zoom One Business Plus account, a Zoom One Enterprise Plus account, or assigned the Zoom Translated Captions add-on.*

- **How to enable automated captions in Zoom:** [https://support.zoom.com/hc/en/article?id=zm\\_kb&sysparm\\_article=KB0058810](https://support.zoom.com/hc/en/article?id=zm_kb&sysparm_article=KB0058810)
- **View captions in meetings or webinars in Zoom:** [https://support.zoom.com/hc/en/article?id=zm\\_kb&sysparm\\_article=KB0059762](https://support.zoom.com/hc/en/article?id=zm_kb&sysparm_article=KB0059762)
- **Google Meet:** <https://support.google.com/meethardware/answer/9495962?hl=en>

### ASR (Automatic Speech Recognition)

Automated speech recognition software employs machine learning to generate real-time captions. The accuracy of these captions is dependent on factors such as internet connection quality, speaker proximity to the microphone, speaker clarity, and the features of the captioning program. Some cost-effective or free automated captioning alternatives are listed below.

#### Zoom companions (able to join meetings and take notes)

- **Zoom's AI Companion:** An integrated feature included with all paid Zoom subscriptions. It can take notes, summarize meetings, create action items, and analyze the predominant tones and speakers during calls. This built-in tool leverages advanced AI models to enhance meeting productivity and provide valuable insights: [https://support.zoom.com/hc/en/article?id=zm\\_kb&sysparm\\_article=KB0057623](https://support.zoom.com/hc/en/article?id=zm_kb&sysparm_article=KB0057623)
- [Otter.ai](#)
- [Fathom.video](#)

**Recommendation:** Check the privacy policy of AI-enabled tools frequently to ensure your data belongs to you. As with any AI-enabled technology, you should thoroughly evaluate the data being shared with third-party note-takers. Ask yourself- is there a possibility of harm to people on the call or communities they serve if the data from the call ends up in the wrong hands? If the answer is "Yes," then the safest choice is to not allow any third-party note-takers in your virtual meetings.

Make sure to provide support materials to folks who need accommodations, such as meeting notes ahead of time, agendas, and other resources, and enable captions. Always evaluate third-party note-takers from a security standpoint first, examine their privacy policy, understand what happens to your notes, guest lists, and other sensitive information, and avoid tools that use your data to train their AI.

*Note: According to their [TOS](#), Zoom does not use any of your audio, video, chat, screen sharing, attachments or other communications-like Customer Content (such as poll results, whiteboard and reactions) to train Zoom or third-party artificial intelligence models.*

### Live Captioning Initiative

Open-source application designed to enhance event accessibility by providing real-time speech-to-text transcription: <https://lc.midcamp.org>

## POTS

### Why is this important?

Postural orthostatic tachycardia syndrome (POTS) is one of a group of disorders that have orthostatic intolerance (OI) as their primary symptom. OI is a condition in which an excessively reduced volume of blood returns to the heart after an individual stands up from a lying down position. The primary symptom of OI is lightheadedness or fainting. Although the cause of POTS is unclear, it often develops after a concussion or viral illness. Before the pandemic, there were an estimated 1 to 3 million Americans with the condition. But now, experts say that there may be at least 1 million or more new POTS patients likely as a result of COVID-19. People battling ‘long-haul’ COVID-19 are especially affected by this. POTS can be unpredictable, and symptoms often fluctuate from day to day. While a definitive cure remains elusive, recent studies have emphasized the importance of individualized treatment plans that combine lifestyle modifications, physical therapy, and, when necessary, pharmacological interventions. By implementing accessibility measures, we can create a more inclusive environment that allows individuals with POTS to participate fully without unnecessary physical strain.

### Recommendation

Your or your employees’ needs might differ depending on how POTS manifests itself, but certain mitigating measures are available.

- **Provide a sit-stand desk or reclining workstation.** This will allow people with POTS to adjust their position throughout the day to help manage their symptoms. Offering ergonomic seating with footrests can also help improve circulation.
- **Keep the office cool.** People with POTS may feel faint or lightheaded when they are hot, so it is important to keep the office cool.
- **Provide access to water.** People with POTS need to drink plenty of fluids to stay hydrated and might need to increase their salt intake, so providing access to water in the office space is crucial.
- **Allow for frequent breaks and/or a flexible schedule.** People with POTS may need frequent breaks throughout the day to sit or lie down, so it is important to allow this flexibility. Remote work is a great solution.



- **Consider providing a quiet space or rest area.** People with POTS may be sensitive to noise, so it is important to consider providing a quiet space in the office where they can go to rest or relax.
- **Be understanding and supportive.** It is essential to be understanding and supportive of people with POTS. This means being flexible with their work schedule and understanding their needs.

Additionally, compression stockings might be helpful for those affected by the condition, as they can help improve circulation and reduce symptoms. For a sudden onset of symptoms, having a yoga mat in your office space for floor time can reduce the risk of falls. According to the [NCBI](#), high sodium intake is recommended for the treatment of POTS, so having a salty snack nearby can also be helpful for people who are affected by this.

## Autism/ADHD

### Why is this important?

*Autism and ADHD are neurodevelopmental conditions that affect communication, attention, executive functioning, and sensory processing. Without proper accommodations, individuals with autism and ADHD may struggle in workplaces, public spaces, and social environments due to sensory overload, difficulty with time management, or challenges with social interactions. Understanding and accommodating these conditions helps create inclusive spaces where neurodivergent individuals can thrive, contribute effectively, and feel supported. In the United States, millions of people are affected by autism and ADHD. [Research](#) suggests that 50–70% of people with autism also have ADHD.*

### Recommendation

#### Flexible work schedules and remote options:

- Many autistic and ADHD individuals work best with flexible hours or remote work options, which allow them to manage energy levels, minimize distractions, and work at their own pace. When possible, provide options for remote attendance when planning an event.

#### Sensory-friendly workspaces and quiet spaces at events:

- Provide quiet work areas, noise-canceling headphones, and adjustable lighting to help employees avoid sensory overload. Provide designated quiet areas where people can take a break from sensory overload at events that you plan.
- Limit GIFS in presentations as they can be distracting and may prohibit learning.

#### Clear signage and visual schedules:

- Many neurodivergent individuals benefit from step-by-step guides, visual instructions, or symbols to help with navigation and reduce anxiety in unfamiliar environments.

#### Movement breaks and alternative seating

- To help with focus and restlessness, allow people to take short movement breaks or provide alternative seating, such as standing desks, wobble stools, or fidget tools.

**Job Accommodation Network (JAN):** <https://askjan.org>

- Offers comprehensive guidance on workplace accommodations for individuals on the autism spectrum.

**PAAutism.org:** <https://paautism.org>

- Provides guidelines on hosting sensory-friendly events.

# PUTTING IT ALL TOGETHER

This effort was a labor of love by the State Voices Data & Technology Department in collaboration with other State Voices staff with the aim of sharing their collective knowledge of the tech space as it currently exists. The entire department contributed to the 2020, 2021, 2022, 2023-2024, and 2025-2026 versions of State Voices' Nonprofit Tools & Tech Guide.

To contact us, please email us at [datateam@statevoices.org](mailto:datateam@statevoices.org).

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