

10 ClickUp Workflows for Non-Profits

How non-profits use ClickUp: 10 real workflows for fundraising, volunteer management, grant tracking, and donor outreach, with examples for each.

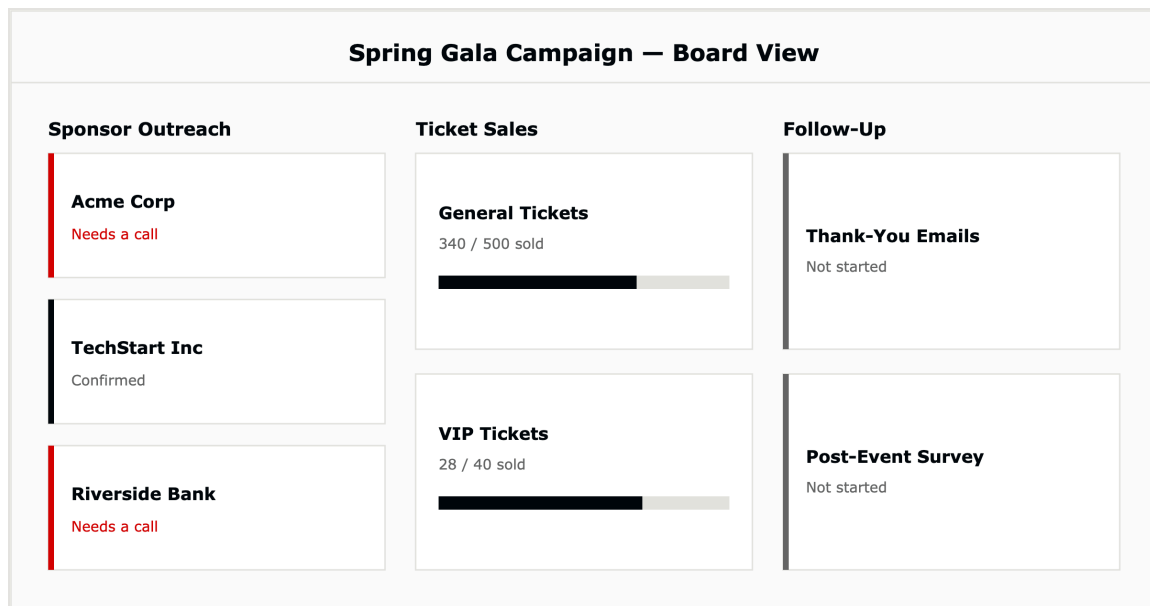


L5 Team

April 3, 2025

Non-profits use ClickUp to run fundraising, volunteer, grant, and program operations from one workspace instead of a mix of spreadsheets and email threads. Below are 10 workflows non-profits build in ClickUp, each with a concrete example of how it plays out day to day, grouped into four areas so you can see how they fit together before diving into each one.

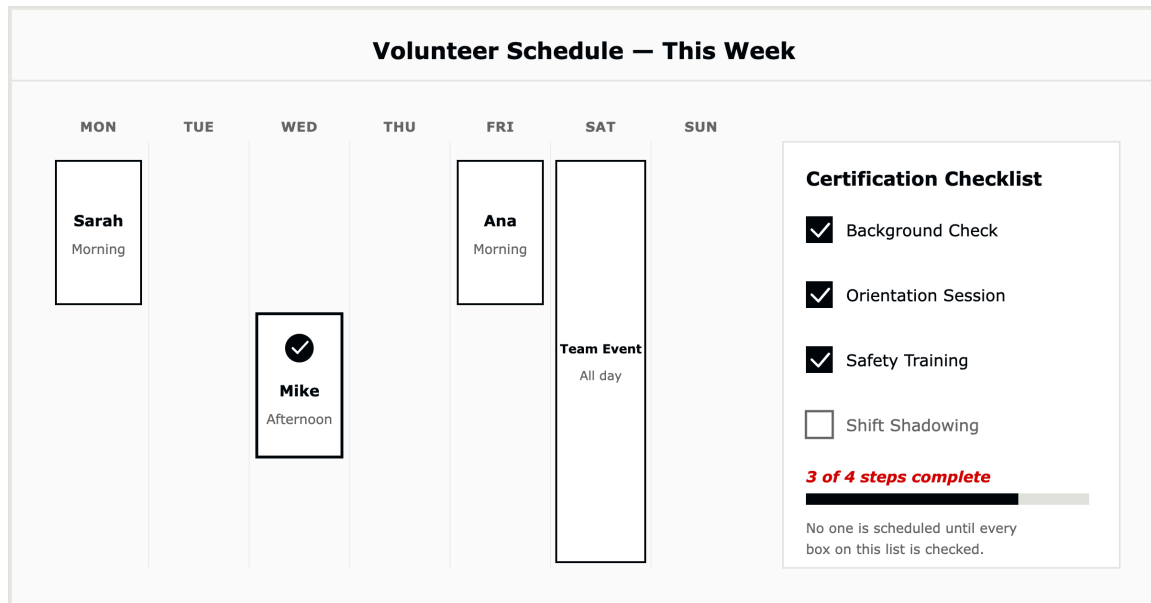
Fundraising and Campaign Management



A Kanban board for the spring gala, with sponsor outreach status visible at a glance.

Plan, organize, and track fundraising campaigns, grant applications, and donor outreach initiatives as ClickUp tasks with owners and deadlines, then monitor progress on a Kanban board or Gantt chart. *In practice:* a spring gala campaign becomes a board with columns for Sponsor Outreach, Ticket Sales, and Follow-Up, so the development team can see at a glance which sponsors still need a call.

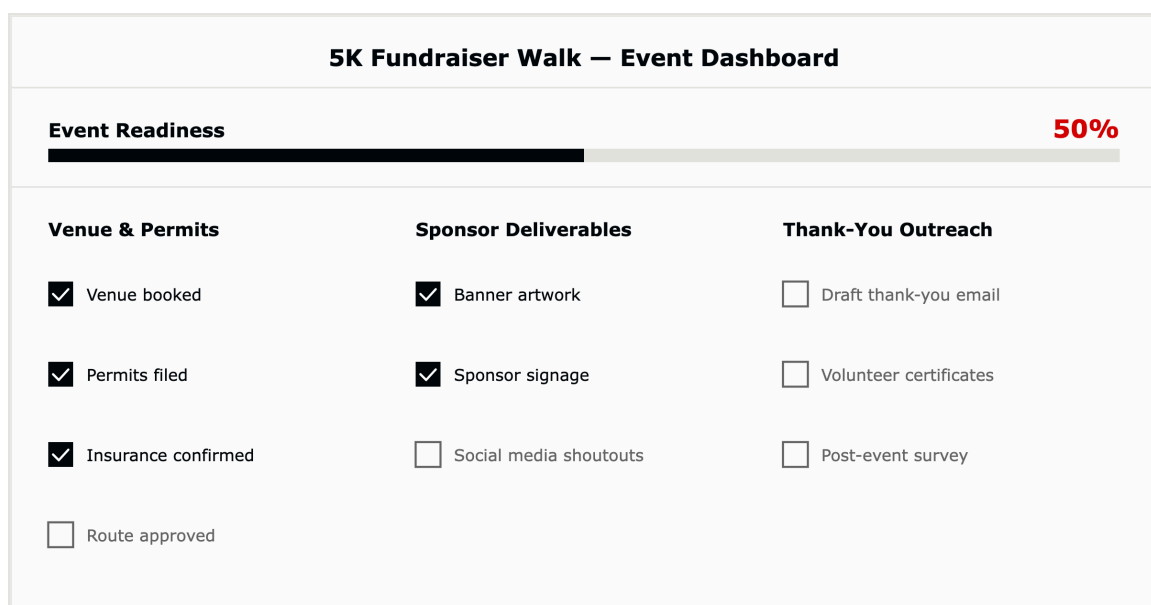
Volunteer Management



A weekly volunteer schedule tied to a certification checklist, so no one is booked for a shift before they're trained.

Manage volunteer recruitment, onboarding, and scheduling with tasks for interviews, training sessions, and event assignments, and use the calendar view to spot scheduling conflicts before they happen. *In practice:* a food bank tracks every volunteer shift as a calendar event linked to a training-completion checklist, so no one is scheduled before they're certified.

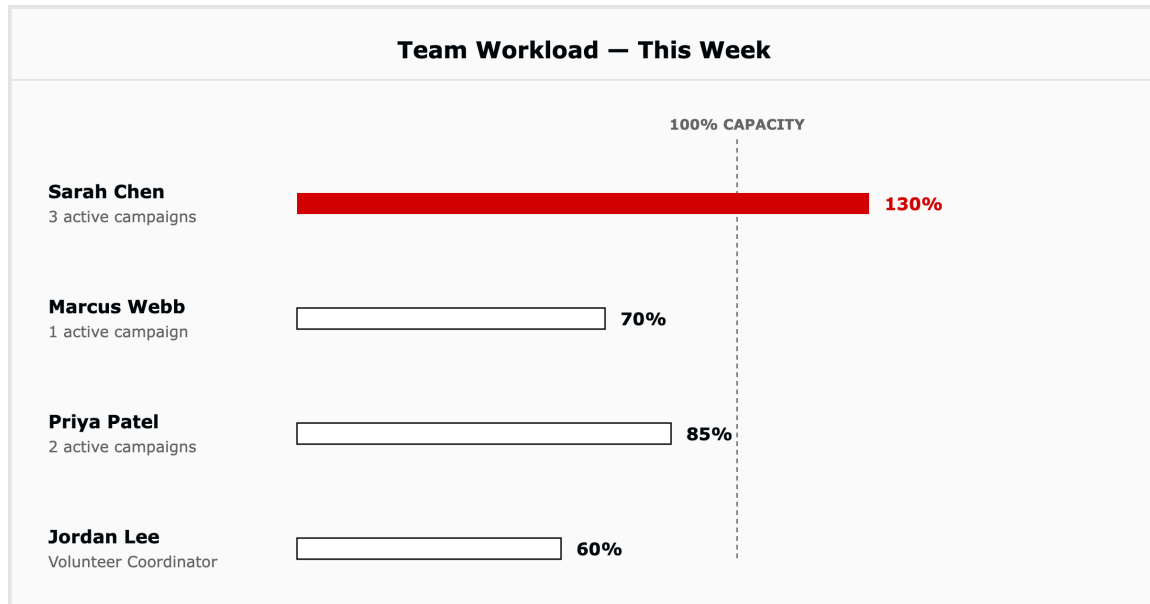
Event Planning



The event dashboard rolling up venue, sponsor, and outreach checklists into one readiness score.

Run fundraisers, conferences, and community programs as ClickUp projects, with tasks for logistics, promotion, and follow-up assigned to specific team members and tracked against a shared deadline. *In practice:* a 5K fundraiser walk uses one list for venue and permits, one for sponsor deliverables, and one for post-event thank-you outreach, all rolling up to a single event dashboard.

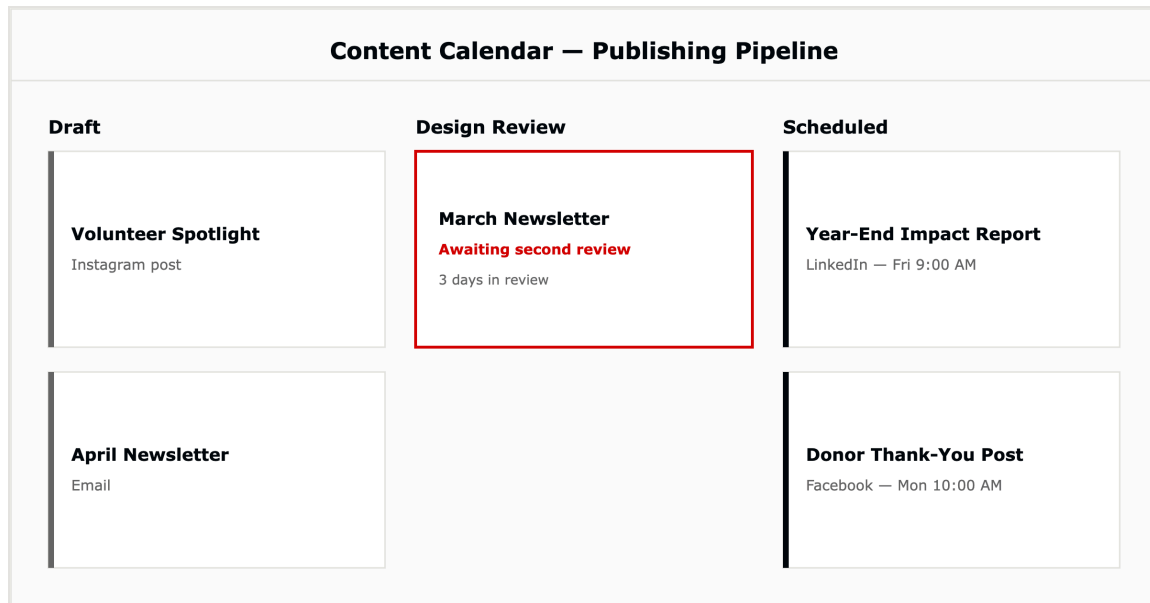
Priority and Resource Allocation



A weekly workload view flagging when one team member is over capacity.

Use ClickUp's priority flags and workload view to see who on a small team is overloaded and which initiatives are genuinely high-impact versus merely urgent. *In practice:* an executive director reviews the workload view weekly to catch when one program manager is carrying three campaigns at once and rebalance before burnout.

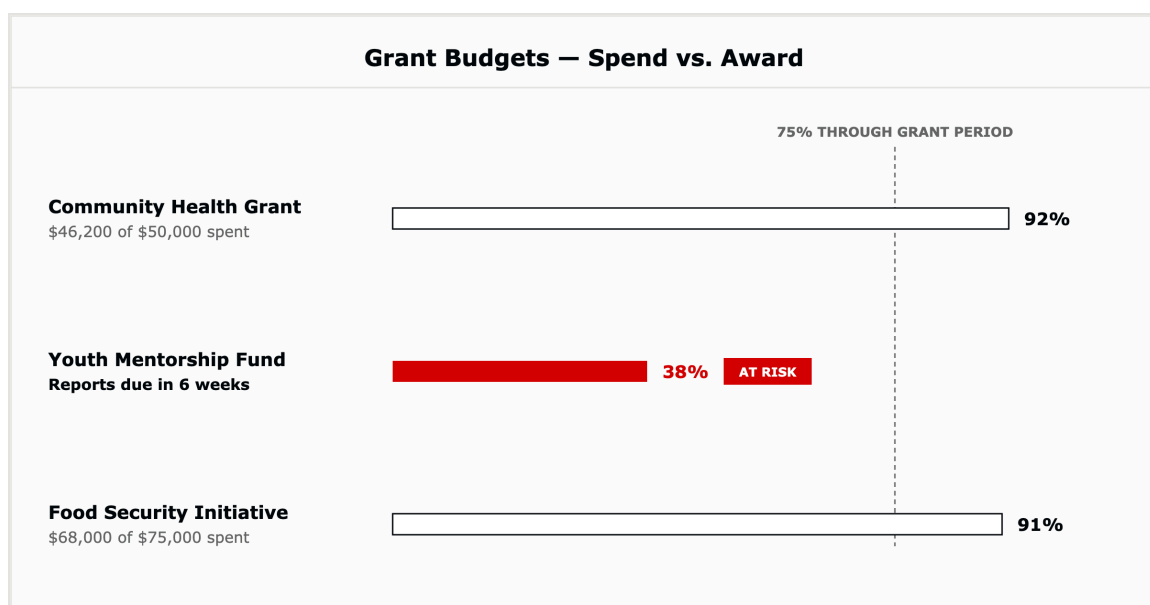
Content Creation and Social Media Management



The publishing pipeline, with the newsletter waiting on a second reviewer before it can go out.

Plan, create, and manage content for websites, newsletters, and social channels, assigning tasks to writers, designers, and social media managers against a shared publishing calendar. *In practice:* a monthly newsletter moves through Draft, Design Review, and Scheduled statuses so nothing goes out without a second set of eyes.

Budget Planning and Tracking



Grant spend tracked against award amount, flagging the fund that is behind pace.

Build budgets for projects, campaigns, or events and track expenses over time using custom fields for cost categories, with ClickUp's dashboards surfacing budget-versus-actual in real time. *In practice:* a grant-funded program tracks spend against its award amount in a custom field so the finance lead can flag underspend before a reporting deadline, not after.

Grant Application and Reporting

Grant Task — Detail View

Community Foundation Grant — FY26

IN PROGRESS

Subtasks

☒ Narrative

Done

☒ Budget

Done

☐ Letters of Support

In Progress



Reporting Requirements.docx

Linked to this grant task

Due 6 months after award

So nothing is missed when the report comes due.

A grant task with its subtasks and the linked reporting doc, all in one place.

Manage the full grant lifecycle, research, proposal writing, submission, and reporting, as a single ClickUp workflow with deadlines, task owners, and stored supporting documents. *In practice:* each grant becomes a task with subtasks for narrative, budget, and letters of support, plus a linked doc for the reporting requirements so nothing is missed months later.

HR and Training

New Case Manager Onboarding — Day 6 of 14		
Welcome & Setup Day 1		Done
Shadow a Case Visit Day 3		Done
Systems Access Review Day 6		Today
Case Management Training Day 8		Upcoming
2-Week Check-In Day 14		Upcoming

A 14-day onboarding checklist that fires training tasks automatically from the new hire's start date.

Manage hiring, onboarding, and employee development for both staff and volunteers, with scheduled interviews, onboarding checklists, and training sessions tracked as tasks. *In practice:* a new case manager's first two weeks are a pre-built onboarding template with training tasks assigned automatically on their start date.

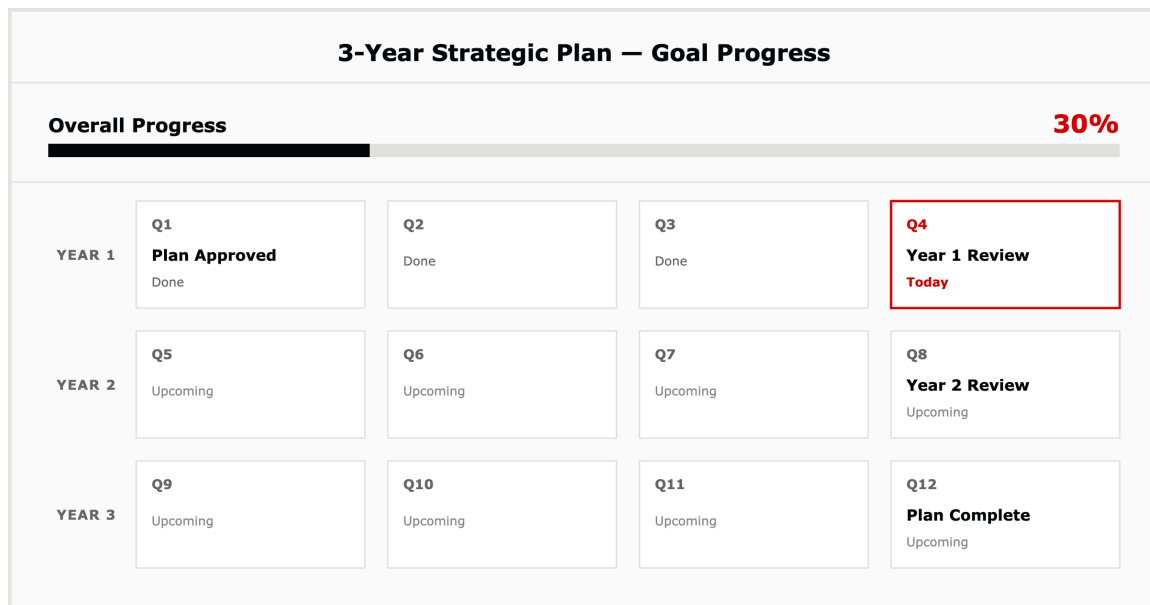
Operations Management

Operations List — All Tasks		
HVAC Filter Replacement Maintenance · Repeats monthly		Next: in 12 days
Fire Extinguisher Inspection Compliance · Repeats quarterly		Next: in 45 days
IT Vendor Contract Renewal Vendor · One-time renewal		Due in 12 days
Nonprofit Insurance Renewal Compliance · One-time renewal		Due in 30 days
Landscaping Service Contract Vendor · Repeats annually		Next: in 90 days
Elevator Safety Certification Compliance · Repeats annually		Next: in 120 days

Maintenance, compliance, and vendor tasks living in one Operations list with recurring reminders.

Centralize administrative tasks, facility management, and compliance requirements so day-to-day operations run from one place instead of scattered email requests. *In practice:* facility maintenance requests, compliance renewal deadlines, and vendor contracts all live as tasks in one Operations list with recurring reminders.

Annual Strategic Goals and Initiatives



The 3-year plan as a single goal with quarterly targets, so progress is visible before every board meeting.

Break annual strategic objectives into actionable projects and tasks, assign owners, and use ClickUp Goals with Targets to track progress toward organizational objectives throughout the year. *In practice:* a board-approved 3-year strategic plan becomes a ClickUp goal with a quarterly Target for each milestone, so leadership can report real progress at each board meeting instead of a year-end scramble.

ClickUp also integrates with tools non-profits already use, Google Drive, Slack, and Mailchimp among them, so existing donor and communication tools plug into the same workspace rather than requiring a wholesale switch.

If you're evaluating other software alongside ClickUp, TechSoup is a long-standing, well-known resource for verified nonprofit discounts across dozens of vendors and is worth checking regardless of which project management tool you land on.

Getting Started: A Simple First Setup

Most small non-profit teams don't need all 10 workflows on day one. A reasonable starting sequence:

1. Pick one workflow, not ten.

Fundraising and campaign management or volunteer scheduling are usually the highest-friction processes to fix first, so start there.

2. Build one board with real statuses.

A simple To Do / In Progress / Done board beats an elaborate custom setup no one maintains.

3. Add one automation.

A single rule, like auto-assigning a follow-up task when a donor form is submitted, proves the value before you invest more setup time.

4. Expand from there.

Add the next workflow only once the first is actually in daily use, not before.

Frequently Asked Questions

Is ClickUp free for non-profits?

ClickUp's standard Free plan is available to any organization, including non-profits, at no cost, with unlimited tasks and core views. ClickUp also offers a discount for eligible 501(c)(3) organizations through its **nonprofit program**; the exact rate isn't published, so apply directly for a quote.

What is ClickUp used for in a non-profit?

Non-profits use ClickUp to run fundraising campaigns, manage volunteers, plan events, track grants and budgets, and handle HR and operations, all from one workspace instead of separate spreadsheets and tools.

Can a small non-profit team use ClickUp without technical staff?

Yes. ClickUp's templates and Free plan are set up for non-technical teams to start with a basic task list and calendar, then add views like Gantt or workload as the organization's needs grow.

For the platform basics, plans, and full feature set, see our **complete ClickUp review**. As an official **ClickUp Diamond and Preferred Partner**, L5 helps non-profits and professional services teams alike configure ClickUp around how they actually work, not a generic template. **Contact us to talk through your organization's setup.**