

NONPROFITS

Nonprofit IT Readiness Checklist

Protect donor trust and stretch every technology dollar further.

Nonprofits handle donor payment data, volunteer information, and sometimes client records, usually on a tight budget. Many qualify for discounted or donated software. This checklist covers what to put in place and where to save.

How to use it: tick what you have in place today. Anything left unticked is a conversation worth having.

01 Use what you qualify for

- ☐ **Nonprofit licensing for Microsoft 365 or Google Workspace**
Donated and discounted plans are substantial.
- ☐ **Donor CRM integrated with fundraising and email tools**
One record for every donor.
- ☐ **Shared drives organized by program, not by person**
Knowledge stays when staff and volunteers leave.
- ☐ **Managed devices for staff, with encryption**
Donated hardware still needs security.
- ☐ **Simple, reliable office network with guest Wi-Fi**
Volunteers and visitors stay off the staff network.

02 Protect donors and data

- ☐ **Multi-factor authentication on email, CRM, and payment platforms**
Donor lists are valuable to criminals.
- ☐ **PCI-compliant donation processing**
Never store card numbers yourself.
- ☐ **Access controls for volunteers and board members**
Give only what each role needs.
- ☐ **Endpoint protection monitored 24/7**
Ransomware does not skip nonprofits.
- ☐ **Payment and grant disbursement verification by phone**
Fake vendor invoices target small finance teams.

03 Sustain the mission

- ☐ **Backups of donor data, files, and email with off-site copies**
Losing donor history is losing relationships.
- ☐ **Volunteer onboarding and offboarding**
Access ends when service ends.
- ☐ **Hurricane and disaster plan**
Many Gulf Coast nonprofits are busiest right after a storm.
- ☐ **Annual technology budget and grant-ready IT plan**
Funders increasingly ask about data protection.
- ☐ **Security awareness training for staff and key volunteers**
Short and practical.

Red flags we see most

- Volunteers share one login.
- Donor data lives in spreadsheets on personal laptops.
- You are paying full price for software you could get discounted.
- Nobody can say when backups last ran.

Where to start

Check your eligibility for nonprofit software programs. The savings often pay for proper security.

Want a second set of eyes?

Book a free 30-minute IT assessment. A senior technician walks through this checklist with you and tells you what to fix first. No sales script, no obligation.

Book a free assessment

(813) 999-0086

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