



The Nonprofit's IT Audit Checklist

When you partner with a Managed Services Provider, you begin a relationship made up of equal parts technology and trust. The technology can be specified, but the trust must be earned. By partnering with Connect Cause, you will work with our expert technicians who are certified across all major systems, but with a model that has your nonprofit organization's budget in mind.

About Connect Cause

Connect Cause helps nonprofits better serve their communities by transforming technology. Your mission is our first priority, which is why we're dedicated to making sure technology is a success driver and not a roadblock. No matter what technology challenges nonprofits face, Connect Cause delivers the planning, project management and database & application development to help make it happen.

Keeping your nonprofit's technology running smoothly isn't just about having the latest tools—it's about making sure your systems are secure, efficient, and aligned with your mission. Use this checklist to assess your current IT environment, identify gaps, and plan smarter tech decisions that support your team and your goals.

► Hardware & Devices

- ☐ Inventory all devices (computers, laptops, tablets, printers, etc.)
- ☐ Identify outdated or slow-performing equipment
- ☐ Check warranty status and support coverage
- ☐ Evaluate whether devices meet staff needs
- ☐ Confirm secure disposal/recycling process for old devices

► Software & Applications

- ☐ List all software and licenses in use (CRM, accounting, email, etc.)
- ☐ Ensure all software is updated and supported
- ☐ Remove unused or duplicate software
- ☐ Evaluate cost-effectiveness of current subscriptions
- ☐ Check compatibility between systems (e.g., does your CRM sync with your email platform?)

► Network & Connectivity

- ☐ Test internet speed and reliability
- ☐ Review router and firewall configurations
- ☐ Assess WiFi security (e.g., password protection, guest networks)
- ☐ Ensure remote access tools are secure and efficient



► Data Security & Backups

- ☐ Review data backup systems (frequency, location, and access)
- ☐ Confirm backups are encrypted and stored securely
- ☐ Check antivirus and anti-malware protection on all devices
- ☐ Ensure sensitive data is stored and shared securely
- ☐ Confirm compliance with relevant data privacy regulations (HIPAA, GDPR, etc.)

► User Access & Permissions

- ☐ Audit user accounts (current vs. former staff/volunteers)
- ☐ Ensure access levels match roles/responsibilities
- ☐ Require strong passwords and/or multi-factor authentication (MFA)
- ☐ Remove or disable inactive accounts

► Technology Policies & Training

- ☐ Review or create an acceptable use policy
- ☐ Ensure staff receives regular cybersecurity training
- ☐ Establish clear processes for onboarding and offboarding users
- ☐ Document disaster recovery and incident response plans

► IT Support & Maintenance

- ☐ Identify who manages IT (internal, volunteer, MSP, etc.)
- ☐ Confirm support response times and coverage
- ☐ Schedule routine updates and proactive maintenance
- ☐ Review IT support tickets or recurring issues

► Future Planning

- ☐ Create a technology budget for upgrades and replacements
- ☐ Identify goals for improved tech use (automation, cloud migration, etc.)
- ☐ Align technology strategy with your nonprofit's mission and growth plans

About Connect Cause

Accredited Managed Services
Provider

State-of-the-Art Operations Center with
Cutting Edge Technology

24 / 7 / 365 Remote Help Desk and
On-Site Support

24 / 7 / 365 Real-Time Network
Monitoring

Experienced, Certified Technicians and
Engineers

Dedicated Account Managers

Predictable Monthly Cost, Scalable Level of
Service

Remote Resolution of Issues More than 90%
of the Time

Easy to Understand Graphical
Reporting of Performance

Reduces IT Operational Costs by Up to 70%

Pro Tip

If this checklist feels overwhelming, that's okay—start with one section at a time or contact Connect Cause (connect@connectcause.com) and request a professional IT audit by our team of experts.

