



The Nonprofit's Tech Health Checklist

About Connect Cause

Connect Cause empowers nonprofit organizations by delivering reliable, affordable, and mission-aligned technology solutions. We specialize in managed IT services, cybersecurity, Voice over IP (VoIP), cloud infrastructure, and application development, all tailored specifically for nonprofits. With flat-fee pricing and unlimited support, our nonprofit clients never have to choose between staying secure and staying on budget. From IT strategy and project management to cloud migrations and database development, our experts ensure technology becomes a success driver, not a roadblock. We partner with leading software vendors to offer exclusive nonprofit discounts, and we manage every aspect of technology, on premises or in the cloud, so nonprofits can focus on what matters most: their mission. Whether you're a growing nonprofit or a national organization, Connect Cause helps you do more with less through strategic IT leadership and responsive support.

Simplify, Secure, and Streamline Your Systems

Use this checklist to assess your current technology, identify gaps, and create a plan for a more efficient, secure tech stack that supports your mission.

Step 1: Take Inventory

► Hardware & Devices

- ☐ Laptops and Desktops (make, model, year)
* For devices that are over 4 years old, make sure you have a lifecycle replacement plan
- ☐ Printers, servers, and other office hardware
- ☐ Devices still under warranty or support contract
- ☐ Devices receiving security updates
- ☐ Staff and volunteers assigned to each device

► Software & Applications

- ☐ List all software and licenses in use (CRM, accounting, email, etc.)
- ☐ Licensed versions with support
- ☐ Duplicate or overlapping tools
- ☐ Admin access tracked and secure

► User Accounts

- ☐ All user accounts documented (email, CRM, tools, etc.)
- ☐ MFA enabled for all major logins
- ☐ Former staff access removed
- ☐ Shared logins replaced with individual accounts



► Step 2: Consolidate and Standardize

- ☐ Free or redundant tools evaluated and removed
- ☐ Productivity tools consolidated (e.g., Microsoft 365)
- ☐ File storage centralized and securely backed up
- ☐ Collaboration tools unified
- ☐ Communication tools streamlined (e.g., Microsoft Teams)

► Step 3: Upgrade Hardware & Infrastructure

- ☐ Devices older than 4 years flagged for replacement
- ☐ Outdated systems or operating software upgraded
- ☐ Plan created for future replacements or refresh cycles
- ☐ Considered Connect Cause HaaS for budgeting flexibility

► Step 4: Strengthen Cybersecurity

- ☐ MFA enabled across all systems
- ☐ Secure password manager in use
- ☐ Antivirus and anti-malware software installed and updated
- ☐ Firewall installed and monitored
- ☐ All software set to auto-update
- ☐ Staff cybersecurity training conducted regularly
- ☐ Incident response plan created

► Step 5: Plan for Growth

- ☐ CRM in place to manage donors, volunteers, and partners
- ☐ Onboarding and offboarding tech process documented
- ☐ Collaboration and productivity tools scalable for team growth
- ☐ Compliance requirements met (HIPAA, PCI, etc.)
- ☐ IT support plan in place (in-house or outsourced)

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%

Need Help?

Connect Cause can help you complete this checklist, streamline your tech stack, and improve your nonprofit's cybersecurity. All without overextending your team, or your budget.

