



The Nonprofit's Tech Resolution 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.

A practical framework to build a secure, efficient, mission-aligned tech strategy for 2026 and beyond.

Every nonprofit relies on technology to communicate, fundraise, deliver services, and protect donor trust. But without a clear plan, aging equipment, cybersecurity vulnerabilities, and scattered processes can slow down your mission when it matters most.

This checklist helps your team identify the improvements that will deliver the greatest impact, even if you have limited staff and budget.

► Foundational Cybersecurity

Goal: Reduce your attack surface and protect donor/client data.

- ☐ Multi-Factor Authentication (MFA) enabled on all accounts
- ☐ Strong password policies enforced
- ☐ Security awareness training conducted regularly
- ☐ Firewall protections configured and monitored
- ☐ Antivirus / endpoint protection installed and current
- ☐ Microsoft 365 or Google Workspace tenant secured
- ☐ Admin access is limited, monitored, and documented
- ☐ Remote devices protected with MDM policies
- ☐ Backup systems tested and verified
- ☐ Incident response plan documented and accessible

Questions to ask:

- Do staff know how to spot phishing scams?
- Who receives alerts when something suspicious happens?

Next Steps: Run a cybersecurity risk review to identify gaps.



► Hardware and Software Health

Goal: Reduce downtime, improve performance, and increase reliability.

- ☐ Inventory list is current
- ☐ Devices older than 4 years flagged for refresh
- ☐ End-of-life systems (like Windows 10), replaced or upgraded
- ☐ Hardware lifecycle plan in place
- ☐ Printers, networking equipment, and phones assessed for age/performance
- ☐ Licensed software tracked and managed
- ☐ Devices imaged and standardized to reduce troubleshooting time

Questions to ask:

- What equipment failed last year?
- Are aging devices slowing down mission work?

Next Steps: Build a 24-month plan with predictable budgeting.

► Collaboration and Workflow

Goal: Reduce friction, miscommunication, and wasted time.

- ☐ Standard file naming / storage system for staff
- ☐ Microsoft Teams or similar tool in use with documented best practices
- ☐ Staff trained on internal communication guidelines
- ☐ Shared calendars and shared drives used effectively
- ☐ Remote / hybrid staff equipped and supported
- ☐ VoIP system in place for reliable communication across locations

Questions to ask:

- How many tools are we using to communicate?
- Can staff find what they need without asking someone else?

Next Steps: Standardize collaboration tools across programs.

► Data and CRM Strategy

Goal: Use data to strengthen relationships and drive decisions.

- ☐ CRM / Donor system is centralized and reliable
- ☐ Donor records consistently maintained
- ☐ Volunteer and program data tracked
- ☐ Reports used to inform leadership decisions
- ☐ Data access permissions documented
- ☐ Data connected to mission outcomes

Questions to ask:

- Is our donor data in one place?
- Do we know which supporters are most engaged?

Next Steps: Connect donor and program outcomes to visual dashboards



► IT Governance and Operations

Goal: Proactively manage tech instead of reacting to emergencies.

- ☐ Vendor accounts documented
- ☐ IT support available when needed
- ☐ Regular patching and maintenance schedule
- ☐ IT budget aligned to mission needs
- ☐ Strong relationship with a trusted MSP
- ☐ Annual technology roadmap in place

Questions to ask:

- Are we spending time solving IT issues instead of serving?
- Are IT costs predictable, or reactive and unexpected?

Next Steps: Partner with an MSP to protect staff time and budget

► Budget and Planning

Goal: Plan intentionally so technology never derails mission work.

- ☐ Budget allocates for hardware lifecycle
- ☐ Security training built into annual plan
- ☐ Cloud storage costs reviewed annually
- ☐ Emergency and replacement funds set aside
- ☐ Strategic IT projects identified for upcoming year
- ☐ Tools periodically evaluated for ROI

Questions to ask:

- Do we have surprise expenses every year?
- Are we spending reactively instead of strategically?

Next Steps: Create a 2-3 year tech roadmap aligned with mission growth

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?

If you'd like help reviewing your checklist, our team can guide you through an assessment and build a roadmap around your budget and goals. Schedule a tech review today: connect@connectcause.com.

