

The Nonprofit Board's IT 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 guide to oversight, risk, and strategic technology decisions.

Technology is no longer just an operational concern. It directly impacts your organization's risk, performance, and ability to deliver on your mission. This checklist helps nonprofit boards and leadership teams evaluate whether technology is being managed strategically or left to chance.

► Governance & Oversight

Is technology part of board-level decision making?

- ☐ Technology is discussed regularly at the board level (not just during crises)
- ☐ IT is included in strategic planning conversations
- ☐ Leadership understands how technology impacts programs, fundraising, and operations
- ☐ There is clear accountability for IT decisions (internal or external partner)
- ☐ The board receives regular, easy-to-understand IT reports

If IT is not discussed at the board level, risk is being accepted without visibility.

► Infrastructure & Reliability

Can your team rely on your systems every day?

- ☐ Systems are stable, secure, and consistently available
- ☐ Downtime is rare and quickly resolved
- ☐ Infrastructure supports current operations and future growth
- ☐ Remote and on-site teams can work without disruption
- ☐ Critical systems have redundancy and failover protections

Unreliable systems quietly reduce productivity and program impact.



► Risk & Cybersecurity

Is your organization actively reducing risk, or reacting to problems?

- ☐ A cybersecurity strategy is in place and reviewed regularly
- ☐ Data protection policies are documented and enforced
- ☐ Backup and disaster recovery systems are tested and monitored
- ☐ Staff receives ongoing cybersecurity awareness training
- ☐ Systems are monitored for threats and vulnerabilities

Ask Your Team or IT Partner:

- How is our data protected?
- What happens if we experience a breach or outage?
- How often are security audits performed?

► Strategic IT Planning

Is your technology aligned with your mission and growth goals?

- ☐ A documented IT roadmap exists (updated annually)
- ☐ Technology decisions are tied to organizational goals
- ☐ Budgeting includes proactive IT investments, not just reactive fixes
- ☐ Leadership understands upcoming technology needs
- ☐ IT supports scalability as your organization grows

Questions to Ask:

- Do we have a clear plan for where our technology is going?
- Or are we making decisions as issues arise?

► Productivity & Staff Experience

Is technology helping your team, or slowing them down?

- ☐ Staff can complete daily tasks without unnecessary friction
- ☐ Common processes are efficient and standardized
- ☐ Support requests are resolved quickly
- ☐ Technology reduces manual work and duplication
- ☐ Communication tools are clear and consistent

Small inefficiencies, repeated daily, create significant organizational drag.

What Strong IT Looks Like

Leadership has visibility into systems and risks

Staff can work efficiently without friction

Security is proactive, not reactive

Technology supports growth, not just maintenance

What Nonprofits Really Need

Most nonprofits do not need more technology. They need better oversight, clearer strategy, and the right support. When boards treat IT as a strategic priority, organizations operate more securely, efficiently, and confidently.

The goal is not to add more tools. It is to ensure the systems you already rely on are secure, aligned, and working together to support your mission. With the right structure in place, technology becomes a strength instead of a source of stress.

Need Help?

If you reviewed this checklist and identified gaps or areas of uncertainty, you are not alone. Many nonprofit leaders know technology is important but are not always sure where to start or what to prioritize.

That is where the right guidance makes a difference. Whether you need a second opinion, a clearer strategy, or hands-on support, Connect Cause helps nonprofits turn uncertainty into a practical, manageable plan.

If you would like help reviewing your checklist or understanding your next steps, reach out to start the conversation: connect@connectcause.com





► Cloud & Systems Management

Are you using modern systems effectively?

- ☐ Cloud systems are secure, scalable, and properly managed
- ☐ Staff can access tools easily from anywhere
- ☐ Systems integrate where needed (CRM, finance, reporting)
- ☐ Data is not in silos across disconnected platforms
- ☐ Technology simplifies workflows instead of complicating them

More tools do not equal better outcomes. Integration and usability matter more.

► Reporting & Visibility

Do you have clear insight into performance and systems?

- ☐ Leadership receives regular IT performance reports
- ☐ Reports include system health, security status, and usage insights
- ☐ Data is used to guide decisions, not just stored
- ☐ Reporting tools support program evaluation and accountability

Questions to Ask:

- Can we clearly see how our systems are performing?
- Or are we relying on assumptions?

► Vendor & MSP Management

Do you have the right technology partner in place?

- ☐ Your IT provider offers proactive support, not just break-fix services
- ☐ Support is available when your team actually needs it
- ☐ Response times and expectations are clearly defined (SLA)
- ☐ Reporting is transparent and easy to understand
- ☐ Pricing is predictable and aligned with your budget

Questions to Ask:

- Do they provide 24/7 monitoring and support?
- Do they proactively manage systems and updates?
- Do they provide clear performance reporting?

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%

IT For Nonprofits

Connect Cause works exclusively with nonprofits, so we understand the unique IT needs of organizations like yours.

If your board is not confident in these areas, let's start the conversation.

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