

Nonprofit Technology Audit Checklist (CRM, Grants, IT & Digital Tools)

Use this checklist to identify gaps across your nonprofit's technology systems, including CRM, donor tracking, grants, marketing tools, and overall IT setup.

CRM & Donor Management

- 1 ■ All donor data is centralized
- 2 ■ No duplicate records exist
- 3 ■ Donations are tracked automatically
- 4 ■ Donor communication history is logged
- 5 ■ Segmentation for campaigns exists
- 6 ■ Recurring donations are automated
- 7 ■ Reports are accurate and easy to generate

Grant & Program Tracking

- 1 ■ Grant deadlines are tracked
- 2 ■ Applications are organized in one place
- 3 ■ Reporting requirements are documented
- 4 ■ Program outcomes are tracked
- 5 ■ Grant status is visible at all times
- 6 ■ Reminders and alerts are automated

Marketing & Growth (Digital Tools)

- 1 ■ Google Ad Grants account is active
- 2 ■ Campaign performance is tracked
- 3 ■ Website conversions are monitored
- 4 ■ Email marketing system is integrated
- 5 ■ Donor acquisition channels are clear

Operations & Automation

- 1 ■ Manual processes are minimized
- 2 ■ Workflows or automations are in place
- 3 ■ Tasks are automatically assigned
- 4 ■ Notifications are set up
- 5 ■ Data entry is streamlined

Reporting & Insights

- 1 ■ Dashboards are set up for leadership
- 2 ■ KPIs are clearly defined
- 3 ■ Reports are easy to access
- 4 ■ Data supports decision-making

IT & Systems Health

- 1 ■ Users have proper access levels
- 2 ■ Security settings are configured
- 3 ■ Systems are regularly maintained
- 4 ■ Unused tools are removed
- 5 ■ Integrations are working properly
- 6 ■ Backups are in place