

Nonprofit

IT Budget Planning



&

TECHNOLOGY

Assessment Template

Nonprofit IT Budget Planning & Technology Assessment Template

Comprehensive Internal Planning Workbook for Nonprofit Organizations

HOW TO USE THIS TEMPLATE

This workbook is designed to help nonprofit organizations evaluate, document, plan, prioritize, and manage technology spending and IT strategy. It can be used during annual budgeting sessions, board meetings, strategic planning reviews, grant preparation, cybersecurity assessments, infrastructure modernization projects, and operational reviews.

This template is intentionally interactive so your organization can:

- Identify technology gaps
 - Evaluate operational risks
 - Plan future IT investments
 - Improve budgeting accuracy
 - Track hardware and software costs
 - Strengthen cybersecurity planning
 - Prepare for grant funding opportunities
 - Improve compliance and governance
 - Align technology with organizational mission goals
 - Reduce unexpected IT expenses
-

ORGANIZATION INFORMATION

Basic Organization Details

Organization Name: _____

DBA (If Applicable): _____

Primary Mission Statement: _____

Primary Contact Name: _____

Title: _____

Email: _____

Phone: _____

Website: _____

Fiscal Year Start Date: _____

Fiscal Year End Date: _____

Total Annual Organizational Budget: _____

Current Annual IT Budget: _____

Estimated Percentage of Budget Allocated to IT: _____

Number of Employees: _____

Number of Volunteers: _____

Number of Office Locations: _____

Number of Remote Staff: _____

Number of Managed Devices: _____

EXECUTIVE TECHNOLOGY OVERVIEW

Organizational Technology Maturity Assessment

Select the option that best describes your organization.

Technology Maturity Level:

Basic / Reactive Developing Moderate / Managed Advanced Strategic / Fully Optimized

Current IT Management Structure:

No Dedicated IT Support Volunteer IT Support Part-Time Contractor Managed IT Provider
 Internal IT Department Hybrid IT Support Model

Primary Technology Challenges:

Aging Equipment Budget Constraints Cybersecurity Concerns Limited Staffing
 Remote Work Issues Poor Internet Connectivity Data Backup Concerns
 Compliance Requirements Software Licensing Costs Lack of Documentation
 Cloud Migration Vendor Management Employee Training Limited Automation
 Data Management Disaster Recovery Planning Communication Systems Outdated Servers
 Weak Wi-Fi Coverage Multi-Location Coordination

Additional Concerns: _____

SECTION 1 — STRATEGIC TECHNOLOGY PLANNING

Technology Goals & Objectives

List your organization's top technology goals for the next 12–36 months.

Priority	Technology Goal	Business/Mission Impact	Estimated Timeline
1	_____	_____	_____
2	_____	_____	_____
3	_____	_____	_____
4	_____	_____	_____
5	_____	_____	_____

Mission Alignment Assessment

How does technology support your mission?

- Client Service Delivery
- Donor Engagement
- Volunteer Coordination
- Grant Management
- Fundraising Campaigns
- Program Tracking
- Data Reporting
- Community Outreach
- Staff Collaboration
- Financial Operations
- Education & Training
- Case Management
- Event Management
- Public Awareness Campaigns

Describe how technology directly impacts your mission delivery:

Technology Planning Horizon

Current Planning Approach:

- No Formal Planning
- Annual Budget Planning Only
- 1-Year Technology Plan
- 3-Year Technology Roadmap
- 5-Year Strategic Technology Plan

Planned Major Technology Initiatives:

Initiative	Planned Year	Estimated Cost	Status
_____	_____	\$ _____	<input type="radio"/> Planned <input type="radio"/> In Progress <input type="radio"/> Deferred
_____	_____	\$ _____	<input type="radio"/> Planned <input type="radio"/> In Progress <input type="radio"/> Deferred
_____	_____	\$ _____	<input type="radio"/> Planned <input type="radio"/> In Progress <input type="radio"/> Deferred
_____	_____	\$ _____	<input type="radio"/> Planned <input type="radio"/> In Progress <input type="radio"/> Deferred

SECTION 2 — CURRENT TECHNOLOGY INVENTORY

HARDWARE ASSESSMENT

Device Inventory Checklist

Workstations & User Devices

Device Type	Quantity	Average Age	Replacement Needed?
Desktop Computers	_____	_____	<input type="radio"/> Yes <input type="radio"/> No
Laptops	_____	_____	<input type="radio"/> Yes <input type="radio"/> No
Tablets	_____	_____	<input type="radio"/> Yes <input type="radio"/> No
Smartphones	_____	_____	<input type="radio"/> Yes <input type="radio"/> No
Thin Clients	_____	_____	<input type="radio"/> Yes <input type="radio"/> No

Infrastructure Equipment

Infrastructure Item	Quantity	Age	Operational Status
Physical Servers	_____	_____	<input type="radio"/> Good <input type="radio"/> Fair <input type="radio"/> Poor
Network Switches	_____	_____	<input type="radio"/> Good <input type="radio"/> Fair <input type="radio"/> Poor
Firewalls	_____	_____	<input type="radio"/> Good <input type="radio"/> Fair <input type="radio"/> Poor
Wireless Access Points	_____	_____	<input type="radio"/> Good <input type="radio"/> Fair <input type="radio"/> Poor
UPS Battery Systems	_____	_____	<input type="radio"/> Good <input type="radio"/> Fair <input type="radio"/> Poor
Backup Devices	_____	_____	<input type="radio"/> Good <input type="radio"/> Fair <input type="radio"/> Poor
Printers/Copiers	_____	_____	<input type="radio"/> Good <input type="radio"/> Fair <input type="radio"/> Poor

Hardware Lifecycle Planning

Current Hardware Replacement Cycle:

No Defined Lifecycle 3 Years 4 Years 5 Years 6+ Years

Hardware Replacement Priorities:

- End-of-Life Servers
- Aging Laptops
- Slow Workstations
- Unsupported Operating Systems
- Outdated Firewalls
- Weak Wireless Infrastructure
- Backup Equipment
- Conference Room Technology
- Printers & Copiers
- Mobile Device Upgrades

Notes: _____

SOFTWARE & CLOUD SERVICES ASSESSMENT

Core Business Applications

Application	Purpose	Annual Cost	Renewal Date
Microsoft 365 / Google Workspace	_____	\$ _____	_____
Accounting Software	_____	\$ _____	_____
Donor Management System	_____	\$ _____	_____
CRM Platform	_____	\$ _____	_____
Case Management Software	_____	\$ _____	_____
Cybersecurity Software	_____	\$ _____	_____
Backup Platform	_____	\$ _____	_____
Video Conferencing	_____	\$ _____	_____
Project Management Platform	_____	\$ _____	_____

Software Licensing Assessment

Current Software Management Practices:

- Centralized Licensing Management
- Renewal Tracking Process
- User Access Reviews
- Vendor Cost Comparisons
- Subscription Optimization Reviews
- Multi-Year Contract Reviews
- Nonprofit Discounts Utilized
- Grant-Based Licensing Assistance

Software Concerns:

- Duplicate Applications
- Unused Licenses
- Expired Licenses
- Rising Subscription Costs
- Shadow IT / Unauthorized Software
- Poor User Adoption
- Lack of Integration
- Vendor Lock-In

Additional Notes: _____

SECTION 3 — CYBERSECURITY & RISK MANAGEMENT

CYBERSECURITY READINESS CHECKLIST

Security Controls Assessment

Basic Security Controls

Security Control	Implemented?	Needs Improvement?	Notes
Multi-Factor Authentication (MFA)	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	_____
Antivirus / Endpoint Protection	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	_____
Firewall Protection	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	_____
Email Spam Filtering	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	_____
Device Encryption	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	_____
Secure Password Policies	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	_____
Regular Software Updates	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	_____
Data Backup Procedures	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No	_____

Advanced Security Controls

Security Measure	Status
Security Awareness Training	<input type="radio"/> Implemented <input type="radio"/> Partial <input type="radio"/> Not Implemented
Cyber Insurance Coverage	<input type="radio"/> Active <input type="radio"/> Reviewing <input type="radio"/> None
Vulnerability Assessments	<input type="radio"/> Annual <input type="radio"/> Occasional <input type="radio"/> Never
Penetration Testing	<input type="radio"/> Annual <input type="radio"/> Occasional <input type="radio"/> Never
Incident Response Plan	<input type="radio"/> Complete <input type="radio"/> Partial <input type="radio"/> None
Disaster Recovery Plan	<input type="radio"/> Complete <input type="radio"/> Partial <input type="radio"/> None
Vendor Security Reviews	<input type="radio"/> Regular <input type="radio"/> Limited <input type="radio"/> None
Access Control Audits	<input type="radio"/> Regular <input type="radio"/> Limited <input type="radio"/> None

Cybersecurity Budget Planning

Security Category	Current Spend	Planned Spend	Priority
Endpoint Protection	\$ _____	\$ _____	<input type="radio"/> High <input type="radio"/> Med <input type="radio"/> Low
Firewall & Network Security	\$ _____	\$ _____	<input type="radio"/> High <input type="radio"/> Med <input type="radio"/> Low
Backup & Disaster Recovery	\$ _____	\$ _____	<input type="radio"/> High <input type="radio"/> Med <input type="radio"/> Low

Security Category	Current Spend	Planned Spend	Priority
Security Awareness Training	\$ _____	\$ _____	<input type="radio"/> High <input type="radio"/> Med <input type="radio"/> Low
Cyber Insurance	\$ _____	\$ _____	<input type="radio"/> High <input type="radio"/> Med <input type="radio"/> Low
Compliance Initiatives	\$ _____	\$ _____	<input type="radio"/> High <input type="radio"/> Med <input type="radio"/> Low

SECTION 4 — IT OPERATIONS & SUPPORT

INTERNAL SUPPORT STRUCTURE

IT Staffing Assessment

Current Support Model:

- No Dedicated Support
 Volunteer-Based Support
 Internal IT Coordinator
 Outsourced Managed IT Provider
 Hybrid Internal + Outsourced
 Full Internal IT Team

Current Staffing Needs

Function	Adequately Supported?	Needs Improvement?
Help Desk Support	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Cybersecurity Management	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Vendor Coordination	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Network Management	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Cloud Administration	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Strategic IT Planning	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
User Training	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No
Documentation Management	<input type="radio"/> Yes <input type="radio"/> No	<input type="radio"/> Yes <input type="radio"/> No

Vendor Management Assessment

Current Technology Vendors

Vendor Name	Service Provided	Annual Cost	Contract Renewal
_____	_____	\$ _____	_____
_____	_____	\$ _____	_____
_____	_____	\$ _____	_____
_____	_____	\$ _____	_____

Vendor Review Checklist:

- Service Level Agreements Reviewed
 Contract Expiration Tracking
 Annual Cost Comparison Reviews
 Nonprofit Discounts Evaluated
 Vendor Security Reviews Completed
 Performance Reviews Conducted
 Backup Vendors Identified
 Documentation Maintained

SECTION 5 — NETWORK & INFRASTRUCTURE PLANNING

NETWORK ENVIRONMENT REVIEW

Internet & Connectivity Assessment

Primary Internet Provider: _____

Current Internet Speed: _____

Monthly Internet Cost: _____

Connectivity Concerns:

- Slow Internet Speeds
- Frequent Outages
- Weak Wireless Coverage
- Remote Access Problems
- Limited Bandwidth
- Security Concerns
- Aging Network Equipment
- Multi-Site Connectivity Issues

Wireless & Remote Work Readiness

Current Remote Work Environment:

- Fully Office-Based
- Hybrid Workforce
- Mostly Remote Workforce
- Multiple Remote Locations

Remote Work Technology Assessment:

- VPN Access
- Cloud File Sharing
- Secure Remote Access
- Video Conferencing Tools
- Mobile Device Management
- Remote Monitoring Tools
- Collaboration Platforms
- Remote Security Controls
- Remote Backup Access
- Device Encryption

Infrastructure Improvement Priorities:

SECTION 6 — DATA MANAGEMENT & BACKUP STRATEGY

DATA GOVERNANCE ASSESSMENT

Critical Data Identification

What types of sensitive data does your organization manage?

- Donor Information Financial Records Client Information Health Information
 Employee Records Volunteer Records Grant Documentation Payment Information
 Legal Documents Board Communications

Backup & Recovery Assessment

Backup Procedures

Backup Area	Status	Frequency	Tested?
Cloud Data Backup	<input type="radio"/> Active <input type="radio"/> None	_____	<input type="radio"/> Yes <input type="radio"/> No
Server Backup	<input type="radio"/> Active <input type="radio"/> None	_____	<input type="radio"/> Yes <input type="radio"/> No
Workstation Backup	<input type="radio"/> Active <input type="radio"/> None	_____	<input type="radio"/> Yes <input type="radio"/> No
Email Backup	<input type="radio"/> Active <input type="radio"/> None	_____	<input type="radio"/> Yes <input type="radio"/> No
Disaster Recovery Testing	<input type="radio"/> Active <input type="radio"/> None	_____	<input type="radio"/> Yes <input type="radio"/> No

Recovery Preparedness:

- Written Disaster Recovery Plan Business Continuity Procedures Emergency Contact List
 Recovery Time Objectives Defined Recovery Testing Conducted Offsite Backup Storage
 Cloud Redundancy Vendor Emergency Support Contacts

Describe your greatest data protection concern:

SECTION 7 — COMPLIANCE & GOVERNANCE

REGULATORY & POLICY REVIEW

Organizational Policies

Policy Area	Exists?	Last Reviewed
Acceptable Use Policy	<input type="radio"/> Yes <input type="radio"/> No	_____
Password Policy	<input type="radio"/> Yes <input type="radio"/> No	_____
Data Retention Policy	<input type="radio"/> Yes <input type="radio"/> No	_____
Incident Response Policy	<input type="radio"/> Yes <input type="radio"/> No	_____

Policy Area	Exists?	Last Reviewed
Remote Work Policy	<input type="radio"/> Yes <input type="radio"/> No	_____
Bring Your Own Device Policy	<input type="radio"/> Yes <input type="radio"/> No	_____
Vendor Management Policy	<input type="radio"/> Yes <input type="radio"/> No	_____
Cybersecurity Policy	<input type="radio"/> Yes <input type="radio"/> No	_____

Compliance Requirements

Applicable Compliance Areas:

- HIPAA
 PCI-DSS
 FERPA
 IRS Requirements
 State Privacy Laws
 Grant Reporting Requirements
 Cyber Insurance Requirements
 Donor Data Protection
 Financial Auditing Standards
 Board Governance Requirements

Compliance Concerns: _____

SECTION 8 — ANNUAL IT BUDGET WORKSHEET

OPERATING EXPENSES (OPEX)

Monthly / Recurring Technology Costs

Expense Category	Monthly Cost	Annual Cost
Internet Services	\$ _____	\$ _____
Managed IT Services	\$ _____	\$ _____
Cloud Services	\$ _____	\$ _____
Software Licensing	\$ _____	\$ _____
Cybersecurity Services	\$ _____	\$ _____
Data Backup Services	\$ _____	\$ _____
Phone Systems	\$ _____	\$ _____
Printing Services	\$ _____	\$ _____
Website Hosting	\$ _____	\$ _____
Email Services	\$ _____	\$ _____
Hardware Maintenance	\$ _____	\$ _____
Training & Certifications	\$ _____	\$ _____

TOTAL ANNUAL OPERATING COSTS: \$ _____

CAPITAL EXPENDITURES (CAPEX)

Planned Technology Investments

Planned Investment	Estimated Cost	Planned Quarter				Approved?	
Hardware Refresh	\$ _____	Q1	Q2	Q3	Q4	Y	N
Server Upgrades	\$ _____	Q1	Q2	Q3	Q4	Y	N
Network Improvements	\$ _____	Q1	Q2	Q3	Q4	Y	N
Cybersecurity Projects	\$ _____	Q1	Q2	Q3	Q4	Y	N
Cloud Migration Projects	\$ _____	Q1	Q2	Q3	Q4	Y	N
Backup/Recovery Improvements	\$ _____	Q1	Q2	Q3	Q4	Y	N
Staff Training Initiatives	\$ _____	Q1	Q2	Q3	Q4	Y	N

TOTAL PLANNED CAPITAL EXPENSES: \$ _____

SECTION 9 — TECHNOLOGY PRIORITIZATION MATRIX

PROJECT PRIORITIZATION WORKSHEET

Evaluate Each Planned Technology Initiative

Project	Business Impact	Cybersecurity Impact	Cost Level	Priority Score
_____	High / Med / Low	High / Med / Low	High / Med / Low	_____
_____	High / Med / Low	High / Med / Low	High / Med / Low	_____
_____	High / Med / Low	High / Med / Low	High / Med / Low	_____
_____	High / Med / Low	High / Med / Low	High / Med / Low	_____

Funding Opportunities Review

Potential Funding Sources:

- Technology Grants
- Community Foundations
- Federal Grant Programs
- State Grant Programs
- Donor Sponsorships
- Corporate Partnerships
- Board Contributions
- Nonprofit Technology Discounts
- Philanthropic Technology Funds
- In-Kind Technology Donations

Funding Notes: _____

SECTION 10 — STAFF TRAINING & ADOPTION

TECHNOLOGY TRAINING REVIEW

User Readiness Assessment

Staff Technology Skill Level:

Beginner Intermediate Advanced Mixed Skill Levels

Areas Where Additional Training Is Needed:

Cybersecurity Awareness Microsoft 365 / Google Workspace Password Security Cloud Collaboration Tools Remote Work Best Practices Data Privacy Phishing Awareness CRM/Donor Platforms File Management Video Conferencing Tools Compliance Training Device Security

Training Budget Planning

Training Area	Estimated Annual Cost	Priority
Security Awareness Training	\$ _____	<input type="radio"/> High <input type="radio"/> Med <input type="radio"/> Low
Software Training	\$ _____	<input type="radio"/> High <input type="radio"/> Med <input type="radio"/> Low
Leadership Technology Training	\$ _____	<input type="radio"/> High <input type="radio"/> Med <input type="radio"/> Low
Compliance Training	\$ _____	<input type="radio"/> High <input type="radio"/> Med <input type="radio"/> Low
IT Staff Certifications	\$ _____	<input type="radio"/> High <input type="radio"/> Med <input type="radio"/> Low

SECTION 11 — TECHNOLOGY RISK ASSESSMENT

RISK IDENTIFICATION WORKSHEET

Organizational Technology Risks

Risk Area	Likelihood	Business Impact	Mitigation Plan
Cybersecurity Attack	High / Med / Low	High / Med / Low	_____
Data Loss	High / Med / Low	High / Med / Low	_____
Internet Outage	High / Med / Low	High / Med / Low	_____
Hardware Failure	High / Med / Low	High / Med / Low	_____
Vendor Failure	High / Med / Low	High / Med / Low	_____
Compliance Violation	High / Med / Low	High / Med / Low	_____

Top Three Technology Risks:

SECTION 12 — BOARD & LEADERSHIP REVIEW

EXECUTIVE REVIEW SUMMARY

Leadership Discussion Checklist

Annual IT Budget Reviewed Cybersecurity Risks Discussed Technology Roadmap Approved Hardware Lifecycle Reviewed Compliance Requirements Evaluated Disaster Recovery Readiness Reviewed Vendor Contracts Reviewed Funding Opportunities Discussed Staff Training Needs Evaluated Long-Term Technology Strategy Reviewed

Board or Leadership Recommendations:

Approval Status: Approved Approved with Revisions Deferred Pending Additional Info

Approved By: _____

Title: _____

Approval Date: _____

SECTION 13 — ACTION PLAN & NEXT STEPS

90-DAY TECHNOLOGY ACTION PLAN

Action Item	Owner	Due Date	Status
_____	_____	_____	<input type="radio"/> Open <input type="radio"/> Complete
_____	_____	_____	<input type="radio"/> Open <input type="radio"/> Complete
_____	_____	_____	<input type="radio"/> Open <input type="radio"/> Complete
_____	_____	_____	<input type="radio"/> Open <input type="radio"/> Complete
_____	_____	_____	<input type="radio"/> Open <input type="radio"/> Complete

12-MONTH TECHNOLOGY ROADMAP

Quarter	Key Initiative	Budget Estimate	Notes
Q1	_____	\$ _____	_____
Q2	_____	\$ _____	_____
Q3	_____	\$ _____	_____
Q4	_____	\$ _____	_____

SECTION 14 — FINAL ORGANIZATIONAL SCORING

INTERNAL TECHNOLOGY HEALTH SCORECARD

Rate each area from 1–5.

Category	Score
Hardware Readiness	_____
Software Management	_____
Cybersecurity Posture	_____
Budget Planning	_____
Strategic Planning	_____
Vendor Management	_____
Data Protection	_____
Staff Training	_____
Compliance Readiness	_____
Disaster Recovery Preparedness	_____

TOTAL SCORE: _____

Technology Readiness Rating:

- Critical Improvement Needed Needs Improvement Moderate Readiness
 Strong Operational Readiness Strategic Technology Leadership

OPTIONAL NOTES & OBSERVATIONS

HELPFUL RECOMMENDATIONS FOR NONPROFIT ORGANIZATIONS

Budget Planning Best Practices

- Plan technology budgets annually
- Build a 3-year roadmap
- Include cybersecurity investments
- Budget for staff training
- Review vendor contracts yearly
- Replace aging devices proactively
- Maintain backup and recovery plans
- Document IT policies and procedures
- Conduct annual risk assessments
- Track software renewals carefully
- Use nonprofit technology discounts
- Evaluate grant funding opportunities

Suggested Annual Review Timeline

- **Q1:** Strategic Planning & Risk Reviews
- **Q2:** Hardware & Software Assessments
- **Q3:** Budget Preparation & Vendor Reviews
- **Q4:** Leadership Approval & Roadmapping

ABOUT THIS RESOURCE

This resource was created to help nonprofit organizations strengthen operational resilience, improve budgeting visibility, reduce cybersecurity risks, and align technology investments with mission-driven outcomes.

Organizations are encouraged to revisit this workbook annually and update technology plans as operational needs evolve.

For additional IT planning assistance, cybersecurity guidance, budgeting support, or nonprofit technology consulting, visit: <https://www.center4.com>

