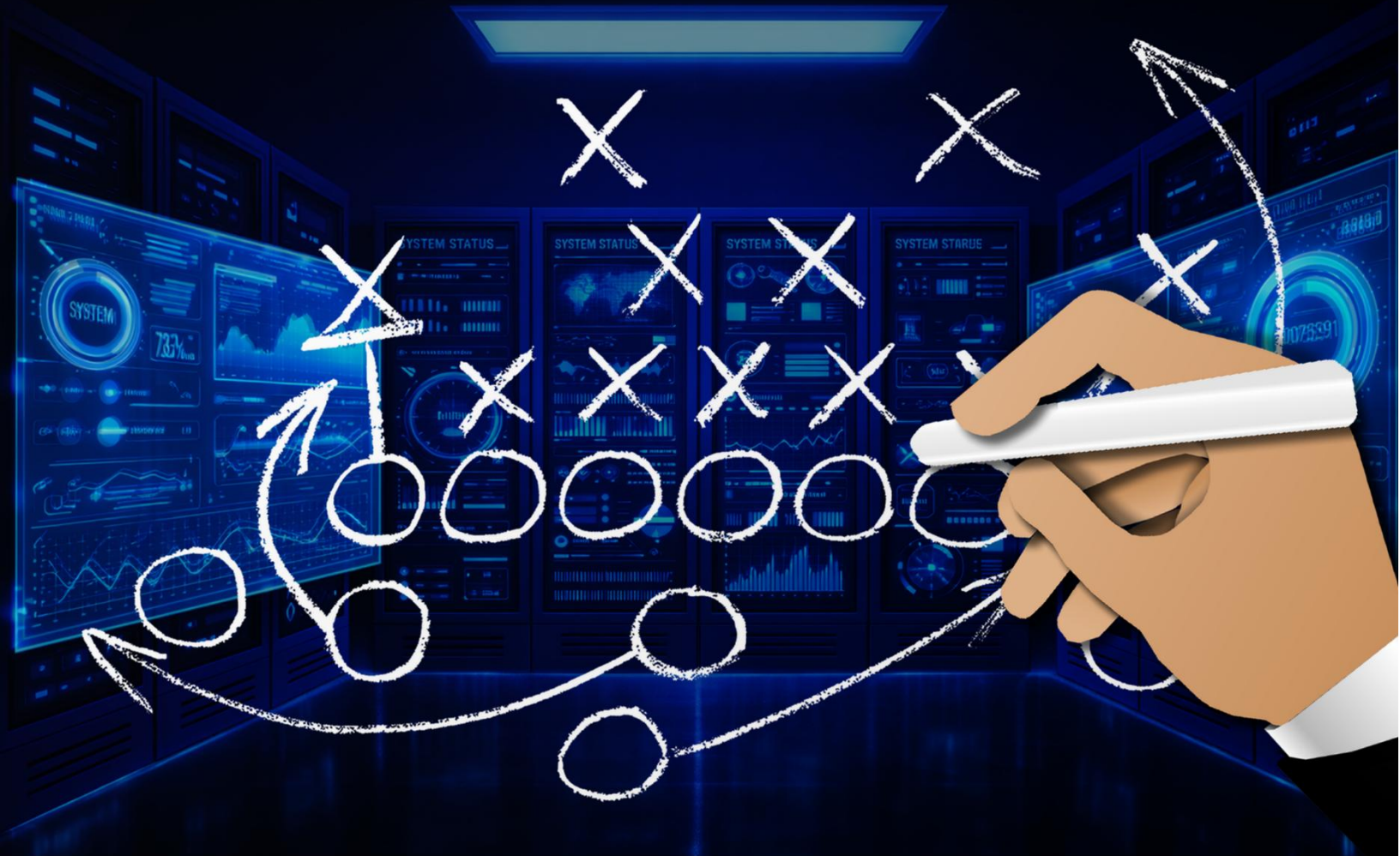


# THE NONPROFIT



# TECHNOLOGY PLAYBOOK

Presented by  
center 

# THE NONPROFIT TECHNOLOGY PLAYBOOK

**A Plain-English Guide to Funding, Cloud, Cybersecurity & Cost Relief**

Powered by Center4 | Supported by AllSector Technology

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## PART 1

### **The Reality of Nonprofit Technology**

*(Foundational, Strategic, Eye-Opening — but Easy to Read)*

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## WELCOME TO THE PLAYBOOK

If you are reading this, you likely fall into one of these categories:

- Executive Director
- Operations Manager
- IT Manager
- Board Member
- Finance Director
- Program Leader
- Accidental IT Person” (you didn’t sign up for this, but here you are)

No matter your title, here’s the truth:

Most nonprofits are overspending on technology, under-protecting their data, and missing out on funding they didn’t even know existed.

This Playbook was created by **Center4** to change that.

Center4 is a nonprofit technology resource hub designed to simplify:

- Technology entitlements
- Broadband subsidies
- Vendor discount programs
- Cybersecurity readiness
- Cloud migration
- IT budgeting
- Grant alignment

Throughout this guide, we’ll also reference real-world provider alignment models, including organizations like **AllSector Technology**, which works with nonprofits in areas such as FCC Rural Healthcare funding, E-Rate services, cloud deployment, and infrastructure modernization.

This guide is educational first. Always.

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## CHAPTER 1

### WHY MOST NONPROFITS OVERPAY FOR TECHNOLOGY

*Let's start with a simple question.*

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### Quick Check:

Circle/Check all that apply.

- We renew licenses automatically without reviewing usage.
- We still have at least one on-prem server.
- We are not using Microsoft or Google nonprofit pricing tiers.
- We don't know if we qualify for FCC programs.
- We don't know what Azure credits are.
- We've never done a cybersecurity risk assessment.
- Our internet contract auto-renews.
- We don't have a 3-year IT plan.

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## THE 5 MOST COMMON TECHNOLOGY MISTAKES NONPROFITS MAKE

### Paying Retail Pricing

Most nonprofits qualify for discounted:

- Microsoft 365 licensing
- Azure credits
- Google Workspace
- Cisco hardware
- Dell & HP devices
- SonicWall security
- DUO MFA
- SentinelOne endpoint protection

Yet many organizations:

- Buy through standard resellers
- Never apply for nonprofit tiers
- Don't know credits exist

**Example:**

Microsoft offers eligible nonprofits:

- Free Microsoft 365 Business Basic
- Deeply discounted Business Premium
- Annual Azure credits (often \$2,000–\$3,500 depending on tier)

That Azure credit alone can often cover:

- A small cloud-based server
- Backup storage
- Testing environment
- Hybrid infrastructure offset

If used strategically, this can reduce the need for:

- On-prem hardware refresh
- Power consumption
- Physical backup systems

---

### **Keeping Servers “Because We Always Have”**

Many nonprofits maintain:

- A domain controller
- A file server
- An accounting server
- A backup appliance

In reality, many could:

- Move files to SharePoint or Google Drive
- Move accounting to cloud SaaS
- Use Azure credit to host one virtual machine
- Reduce on-prem footprint by 50%+

Less hardware = less:

- Power draw
- Maintenance

- ›› Break/fix expense
  - ›› Emergency stress
- 

### **Ignoring FCC and Federal Subsidy Programs**

Many nonprofits (especially healthcare, rural, education-based, or community service providers) qualify for:

- ›› FCC Rural Healthcare Program (up to 65% internet cost subsidy)
- ›› E-Rate
- ›› State broadband expansion grants
- ›› NTIA Digital Equity programs

Yet most never apply.

Why?

Because they assume:

- ›› “It’s complicated.”
- ›› “We’re too small.”
- ›› “We won’t qualify.”

Often not true.

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### **Treating Cybersecurity as Optional**

Cybersecurity is no longer an IT issue.

It is a:

- ›› Board issue
- ›› Insurance issue
- ›› Compliance issue
- ›› Reputation issue

Basic protections like:

- ›› MFA
- ›› Backup testing
- ›› Endpoint detection
- ›› Conditional access

Are now minimum requirements for:

- › Cyber insurance
  - › Federal funding
  - › Many grant programs
- 

### **5 No 3-Year Roadmap**

**Without a roadmap:**

Technology becomes reactive.

**With a roadmap:**

Technology becomes strategic.

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## **INTERACTIVE ASSESSMENT**

### **Your Nonprofit Technology Maturity Score**

For each question, rate yourself 0–3.

**0** = Not at all

**1** = Somewhat

**2** = Mostly

**3** = Fully implemented

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## **INFRASTRUCTURE**

We have documented all hardware and software.

**Score:**

We review licensing annually.

**Score:**

We use nonprofit pricing tiers.

**Score:**

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## **CLOUD READINESS**

We understand what Azure credits we qualify for.

**Score:**

We have evaluated moving at least one server to the cloud.

**Score:**

We know our on-prem footprint cost.

**Score:**

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## **CYBERSECURITY**

MFA is enabled for all users.

**Score:**

We test backups quarterly.

**Score:**

We have an incident response plan.

**Score:**

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## **FUNDING & ENTITLEMENTS**

We have reviewed FCC program eligibility.

**Score:**

We know which tech vendor programs we qualify for.

**Score:**

We have someone assigned to entitlement tracking.

**Score:**

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## **Scoring**

**0–12: Reactive Stage**

**13–24: Stabilizing Stage**

**25–36: Strategic Stage**

**Write your total Score:**

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## CHAPTER 2

### UNDERSTANDING THE NONPROFIT TECHNOLOGY STACK

(Why Your Technology Is Like a 5-Layer Cake — and What Happens When It Collapses)

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## Why This Chapter Matters

Most nonprofits don't struggle because they lack technology.

They struggle because:

- They don't understand how their technology fits together
- They upgrade one piece but ignore the others
- They secure one layer but leave another exposed
- They budget randomly instead of strategically

Before we talk about entitlements, grants, or savings...

You must understand your **Technology Stack**.

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## The 5-Layer Nonprofit Technology Stack

Think of your organization's technology like a 5-layer cake.

If one layer fails, the entire structure becomes unstable.

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### LAYER 1 – CONNECTIVITY

*(The Foundation)*

This is your internet connection.

It includes:

- Fiber circuits
- Cable internet
- Dedicated Internet Access (DIA)
- Backup circuits
- VoIP systems
- SD-WAN (if applicable)

**If connectivity fails:**

- Staff cannot access cloud systems
- Remote workers are disconnected
- Donor databases are inaccessible
- Cloud backups stop syncing

Without stable connectivity, everything above it suffers.

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## Quick Reflection

Check all that apply:

- We have only one internet circuit
- We do not know our contract expiration date
- Our internet auto-renews
- We have never compared ISP pricing
- We don't know if we qualify for FCC subsidy programs

If you checked 2 or more — your foundation needs evaluation.

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## Layer 2 – Infrastructure

*(Where Your Data Lives)*

Infrastructure includes:

- On-premise servers
- Virtual machines
- Cloud environments (Azure, AWS, etc.)
- File storage
- Backup systems
- Identity systems (domain controllers)

This is where your applications run.

Many nonprofits still maintain:

- A file server
- A domain controller
- A backup appliance
- Possibly an aging physical server

Some could reduce their physical footprint by:

- Moving file storage to SharePoint or Google Drive

- Using Azure nonprofit credit to host one small virtual machine
- Using cloud backup instead of hardware backup appliances

Infrastructure is where cost creep hides

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## FILL-IN EXERCISE

### Map Your Infrastructure

Number of On-Prem Servers:

Primary Cloud Provider (if any):

Azure Grant Activated?  Yes  No  Not Sure

Backup Type:

- Onsite Only
- Cloud Only
- Hybrid
- We Are Not Sure

Estimated Annual Server Maintenance Cost:

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### Layer 3 – Productivity

*(How Your Team Gets Work Done)*

This layer includes:

- Microsoft 365
- Google Workspace
- CRM systems (Salesforce, HubSpot, etc.)
- Project management tools (Asana, Monday, Airtable)

Communication tools (Slack, Zoom, Teams)

This layer is often where:

- License waste happens
- Entitlements are missed
- Duplicate tools exist
- Free nonprofit tiers go unused

Example:

If you qualify for Microsoft 365 nonprofit licensing and still pay retail pricing — that is money lost annually.

If you qualify for Google Ad Grants and are not using it — that is visibility lost monthly.

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### License Waste Check

- We have reviewed licenses in the past 12 months
- We know how many inactive users exist
- We know which staff require premium vs basic licenses
- We have turned off unused subscriptions

If not, this is low-effort, high-return work.

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### Layer 4 – Security

*(What Protects Everything Above It)*

Security includes:

- Multi-Factor Authentication (MFA)
- Endpoint protection
- Firewalls
- Conditional access
- Email filtering
- Backup testing
- Incident response planning

Security is no longer optional.

Cyber insurance carriers now require:

- MFA
- Endpoint detection
- Backup verification
- Written policies

If security is weak, every other layer is exposed.

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## SECURITY SELF-CHECK

- MFA enabled for all users
- MFA enabled for all administrators
- Backups tested quarterly
- Incident Response Plan documented
- Firewall firmware updated

Score yourself honestly.

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### Layer 5 – Governance

*(The Layer Most Nonprofits Ignore)*

Governance includes:

IT policies

- Acceptable Use Policies
- Data retention policies
- Vendor review processes
- Documentation
- Compliance tracking

Governance is what makes your stack sustainable.

Without governance:

- Staff create shadow IT
- Licenses sprawl
- Vendors auto-renew
- Risk increases silently

Governance does not mean bureaucracy.

It means clarity.

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### The “Cake Collapse” Scenario

Let’s illustrate what happens when one layer fails.

Scenario:

Your internet circuit fails (Layer 1).

Result:

- Staff cannot access Microsoft 365
- Cloud backups pause
- VoIP goes down
- Remote staff cannot work
- CRM access is lost

The foundation failed — so the entire cake wobbles.

Now imagine:

Security fails (Layer 4).

Result:

- Ransomware locks files
- Backups may or may not restore
- Donor data exposed
- Cyber insurance claim required
- Board involvement
- Public relations risk

That is why we evaluate the stack holistically.

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## THE NONPROFIT TECHNOLOGY MATURITY MODEL

For each layer, score 0–3.

**0** = Reactive

**1** = Basic

**2** = Structured

**3** = Strategic

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### Connectivity Score:

**0** – Single connection, no review

**1** – Stable connection but never reviewed

- 2 – Reviewed annually, contract awareness
  - 3 – Redundant strategy + cost review + subsidy evaluation
- 

### Infrastructure Score:

- 0 – Aging hardware, no plan
  - 1 – Partial cloud, unclear strategy
  - 2 – Hybrid with defined plan
  - 3 – Cloud-aligned with cost tracking + credit usage
- 

### Productivity Score:

- 0 – Tool sprawl
  - 1 – Basic licensing but no review
  - 2 – Right-sized licensing
  - 3 – Fully entitlement-optimized + integration
- 

### Security Score:

- 0 – No MFA
  - 1 – MFA partially enabled
  - 2 – MFA + endpoint + backups
  - 3 – Documented security program + annual review
- 

### Governance Score:

- 0 – No documentation
  - 1 – Some policies
  - 2 – Structured documentation
  - 3 – Quarterly review + ownership assigned
- 

### Total Score:

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### Interpretation

**0-5** = High Risk / Reactive

**6-10** = Stabilizing

**11-15** = Structured

**16-20** = Strategic

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## YOUR TECHNOLOGY STACK SNAPSHOT

Fill this out and keep it in your binder.

Internet Provider:

Monthly Cost:

Contract End Date:

On-Prem Servers:

Cloud Providers:

Microsoft / Google Tier:

Azure Credits Used?  Yes  No

Firewall Brand:

MFA Enabled?  Yes  No

Cyber Insurance Provider:

Assigned IT Owner:

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### Why This Matters Before Entitlements

If you don't know your stack:

You cannot:

- Right-size licensing
- Use cloud credits effectively
- Apply for broadband subsidy programs
- Prove compliance for grants
- Budget intelligently

Understanding your stack is step one.

Optimizing it is step two.

Funding it strategically is step three.

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## CHAPTER SUMMARY

The 5 layers:

1. Connectivity
2. Infrastructure
3. Productivity
4. Security
5. Governance

Every nonprofit — regardless of size — has all five.

Your goal is not perfection.

Your goal is awareness.

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## CHAPTER 3

### TECHNOLOGY ENTITLEMENTS YOU MAY BE MISSING

*(You Probably Qualify. You Just Haven't Claimed It Yet.)*

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## Let's Simplify the Word "Entitlement"

An entitlement is not a handout.

It's not charity.

It's not special treatment.

It simply means:

Because you are a verified nonprofit, you qualify for pricing, credits, licenses, or support that for-profit companies do not.

But here's the problem:

Most nonprofits never activate what they qualify for.

And that's where money leaks quietly every year.

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## THE 3 TYPES OF TECHNOLOGY RELIEF

Before we dive into specific programs, let's define what we're talking about.

### Type 1 – Discounted Pricing

You still pay — but at nonprofit pricing tiers.

Examples:

- Microsoft 365 nonprofit licenses
- Slack nonprofit discount
- HubSpot nonprofit pricing
- Zoom nonprofit discount

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### Type 2 – Granted Licenses or Credits

You receive something at no cost (with eligibility verification).

Examples:

- Microsoft 365 Business Basic (grant tier for eligible nonprofits)
  - Microsoft Azure annual nonprofit credit
  - Google Ad Grants (\$10,000/month in search ads)
  - Canva Pro for Nonprofits
-

### Type 3 – Donated or Deeply Subsidized Technology

Often routed through validation platforms.

Examples:

- Cisco donation programs
  - Security software via TechSoup pathways
  - Identity management discounts
  - Cloud credits for experimentation
- 

### Why Most Nonprofits Never Claim Entitlements

Check any that apply:

- We don't know what we qualify for
- We assume we are too small
- We assume we are too large
- We don't have time to research programs
- We don't know who owns this internally
- We applied once and gave up
- We worry it's complicated

If you checked 3 or more — this chapter will change that.

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### The Nonprofit Entitlement Activation Model

#### (How Programs Actually Work Behind the Scenes)

Nearly all vendor nonprofit programs follow this pattern:

1. Verify your nonprofit status
2. Validate through a verification platform (if required)
3. Apply through vendor nonprofit portal
4. Assign an internal owner
5. Activate credits/licenses
6. Review annually

If you skip Step 4 (assigning ownership), programs quietly expire.

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## Step 1 – Verification Foundations

Before claiming anything, confirm you have:

- IRS determination letter
- EIN confirmation
- Organization legal name matches official records
- Active contact email tied to organization domain

Without clean documentation, activation gets delayed.

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## Step 2 – The Validation Gatekeepers

Many programs rely on nonprofit verification platforms.

You will commonly encounter:

- TechSoup
- Goodstack
- Vendor-specific nonprofit portals

These platforms are not resellers.

They are verification filters.

Think of them as nonprofit ID checkers.

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## The “Owner Problem”

### (Why Entitlements Expire Quietly)

Every entitlement needs a human owner.

Not IT in general.

Not “the organization.”

A named person.

Fill this in:

Entitlements Owner:

Backup Owner:

Calendar Reminder System:

- Outlook
- Google Calendar
- Asana
- Other

Quarterly review date:

If this step doesn't happen, credits lapse.

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### The Core Entitlement Categories

#### (Mapped to Your Technology Stack)

We're going to align entitlements to the 5-layer stack from Chapter 2.

This makes claiming them strategic instead of random.

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### CATEGORY 1 – Connectivity & Infrastructure Credits

#### Microsoft Azure Nonprofit Grant

Eligible nonprofits may receive an annual Azure credit.

What this can realistically fund:

- A small virtual server
- Backup storage
- Testing environment
- Hybrid identity services
- Temporary migration staging

Plain English version:

Instead of buying a new physical server, you may be able to run one virtually in the cloud using your annual credit.

---

### Azure Fit Assessment

- We still have at least one on-prem server
- We need offsite backup

- We have a legacy application
- We want to reduce hardware purchases
- We want disaster recovery capability

If you checked 2+, evaluate Azure credit.

---

### **AWS Nonprofit Credit Programs**

Some nonprofits qualify for AWS promotional credits.

Use cases include:

- Cloud hosting
- Data storage
- Disaster recovery
- Application modernization

This is not a “switch everything” recommendation.

It is an evaluation opportunity.

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## **CATEGORY 2 – Productivity & Licensing Relief**

### **Microsoft 365 Nonprofit Licensing**

Possible pathways may include:

- Free Business Basic tier (eligibility-based)
- Discounted Business Premium
- Discounted security add-ons

Questions to ask:

- Are we paying retail pricing?
  - Are we over-licensing?
  - Are inactive users consuming paid seats?
- 

### **Google for Nonprofits**

Includes potential access to:

- Google Workspace for Nonprofits
- Google Ad Grants
- YouTube donation tools

Google Ad Grants alone can:

- Increase donor visibility
- Drive volunteer signups
- Promote programs
- Promote educational resources

If unused, this is invisible marketing loss.

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## CATEGORY 3 – Security & Risk Reduction Programs

### Identity & MFA Programs

Examples in the nonprofit ecosystem include:

- Microsoft Security Defaults
- Entra ID MFA
- Okta nonprofit programs
- Hardware-based MFA pathways

Security programs often unlock:

- Insurance eligibility
  - Grant eligibility
  - Reduced breach exposure
- 

### Security Software Discounts

Through nonprofit validation pathways, organizations may access discounts on:

- Endpoint protection
- Email security
- Password managers
- Vulnerability scanning

Security entitlements often have higher ROI than hardware purchases.

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## CATEGORY 4 – Marketing & Fundraising Technology Relief

Examples include:

- Google Ad Grants
- Canva for Nonprofits
- HubSpot nonprofit discounts
- Salesforce nonprofit models
- Mailchimp nonprofit discounts

These tools directly impact:

- Donor growth
- Volunteer engagement
- Campaign performance

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## CATEGORY 5 – Automation & Workflow Tools

Many nonprofits qualify for discounts on:

- Zapier
- Asana
- Airtable
- Notion
- Slack

These reduce administrative overhead.

Time saved = financial relief.

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### The Entitlement Discovery Loop

**(How to Stay Updated Without Living Online)**

Monthly (30 minutes):

- Review Center4 Programs directory
- Check entitlement renewals
- Review vendor nonprofit portals
- Confirm licenses are right-sized

Quarterly:

- Audit subscriptions
- Remove inactive users
- Review security compliance
- Check internet contract timeline

Annually:

- Confirm nonprofit validation
- Renew cloud credits
- Reassess stack maturity

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## INTERACTIVE WORKSHEET

### Entitlement Tracking Sheet

Program Name:

Category:

Owner:

Activation Date:

Renewal Date:

Estimated Annual Value:

Status:  Not Started  Active  Needs Renewal  Expired

Total Estimated Annual Relief: \$

---

### Entitlement Prioritization Matrix

If your organization is:

**Small (<10 staff):**

Focus first on:

- Microsoft 365 nonprofit licensing
- MFA activation
- Google Ad Grants
- Cloud backup

**Mid-sized (10–100 staff):**

Focus on:

- License optimization

- Azure or AWS credits
- Security programs
- Automation tools

#### Healthcare / Multi-site:

Evaluate:

- FCC subsidy eligibility
- Redundant connectivity
- Hybrid cloud strategy
- Security assessments

---

### The Financial Relief Mindset Shift

Instead of asking:

“Can we afford new technology?”

Ask:

“What entitlements have we not activated?”

Most nonprofits can improve their technology posture without increasing their budget.

They simply need structure.

---

## CHAPTER SUMMARY

Entitlements are:

- Real
- Accessible
- Often unused
- Renewal-sensitive
- Strategically powerful

Claiming them requires:

- Verification
- Ownership
- Annual review
- Intentional tracking

---

## CHAPTER 4

### THE FCC RURAL HEALTH CARE PROGRAM & BROADBAND SUBSIDIES

*(And Why “Rural” Does Not Always Mean What You Think)*

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## Why This Chapter Matters

For eligible healthcare nonprofits, this may be the single largest ongoing telecommunications subsidy available in the United States.

The FCC Rural Health Care (RHC) Program provides funding to eligible healthcare providers for broadband and telecommunications services necessary for delivering healthcare.

And under its largest component — the Healthcare Connect Fund (HCF) — eligible participants receive:

### **A flat 65% discount on eligible broadband services and network expenses.**

That means:

- A \$900/month fiber circuit may cost only \$315/month after subsidy.
- \$10,000/month multi-site health network may be reduced to \$3,500/month.
- ng-term telecom expenses can drop dramatically.

This is not a one-time grant.

It is an ongoing subsidy.

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## SECTION 1

### What Is the FCC Rural Health Care Program?

The Rural Health Care (RHC) Program is administered by:

- The Federal Communications Commission (FCC)
- The Universal Service Administrative Company (USAC)

The program exists to:

- Expand broadband access to healthcare providers
- Improve telemedicine capabilities
- Strengthen electronic health record exchange
- Reduce healthcare costs in underserved areas

According to the FCC program overview, funding is provided on an annual basis and the program operates under a funding cap that is adjusted for inflation annually

As of recent funding years, the cap has increased significantly (over \$570 million annually in recent cycles)

The program consists of two components:

### **1. Healthcare Connect Fund (HCF)**

Provides:

- 65% flat discount on broadband services
- Support for network equipment
- Support for dark fiber leases
- Support for HCP-constructed facilities (if cost-effective)

This is the most widely used portion of the program.

### **2. Telecommunications Program**

Subsidizes the difference between rural and urban telecom rates.

Most modern applicants pursue the Healthcare Connect Fund due to broadband support flexibility.

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## **SECTION 2**

### **Who Is Eligible?**

This is where many nonprofits get confused.

The word “Rural” appears in the program name.

Many organizations assume:

“We are not rural. Therefore, we do not qualify.”

That is not always correct.

### **Eligible Entity Types**

To qualify, the organization must be:

- A public or nonprofit entity
- Within one of the defined healthcare provider categories

Eligible categories include:

- Nonprofit hospitals
- Rural health clinics
- Community health centers
- Community mental health centers
- Local health departments
- Skilled nursing facilities
- Post-secondary educational institutions offering healthcare instruction
- Teaching hospitals
- Consortia of the above

(As defined in FCC documentation and Healthcare Connect Fund program materials)

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### **CRITICAL: The Consortium Rule**

Non-rural healthcare providers MAY participate if:

They are part of a consortium that has more than 50% rural sites.

This is clearly stated in the Healthcare Connect Fund eligibility documentation

RHC Health Care Program - Healt...

and reiterated in the FCC program overview

#### **This means:**

A nonprofit healthcare clinic in Manhattan

OR

A behavioral health provider in Buffalo

OR

A nonprofit hospital in a suburban zone

May still qualify if they join a majority-rural consortium.

This is one of the most misunderstood aspects of the program.

---

### **Real-World Insight**

Several New York-based healthcare nonprofits have:

- Assumed they were ineligible due to urban classification
- Contacted program specialists for review
- Joined qualifying majority-rural consortia

- Been accepted into the program
- Begun receiving 65% broadband subsidies

**Eligibility review often requires:**

- FCC Form 460 submission
- Rurality determination
- Consortium participation review
- Service eligibility validation

This is why eligibility conversations matter.

---

## SECTION 3

### What Does the 65% Subsidy Cover?

Under the Healthcare Connect Fund, eligible expenses include:

- ✓ Internet access
- ✓ Lit fiber leases
- ✓ Dark fiber
- ✓ Business data services
- ✓ DSL (in some cases)
- ✓ Connections to research and education networks
- ✓ Network equipment necessary to make broadband functional
- ✓ HCP-constructed and owned facilities (if cost-effective)

As outlined in FCC Healthcare Connect Fund guidance Healthcare Connect Fund FAQs.

**Important:** The healthcare provider must contribute 35%.

The 35% contribution can come from:

#### Organizational funds

- State grants
- Federal grants
- Tribal funds
- Private grant funding

(Ineligible sources include vendor-provided “in-kind” contributions)

---

## SECTION 4

### Application Process (Simplified)

Here is the high-level workflow:

1. File FCC Form 460 (Eligibility Determination)
2. Post FCC Form 461 (Competitive Bidding – 28 days minimum)
3. Select most cost-effective provider
4. File FCC Form 462 (Funding Request)
5. Receive Funding Commitment Letter
6. File FCC Form 463 (Invoicing)

All submissions occur through USAC's My Portal system.

This is a structured compliance-driven process.

It is manageable — but requires attention to detail.

---

## SECTION 5

### Funding Caps & Important Limits

- Program funding is capped annually (adjusted for inflation)

Summary of the FCC RHC Program

- Multi-year commitments allowed (up to 3 funding years)

Healthcare Connect Fund FAQs

- Installation charges supported up to defined limits

Healthcare Connect Fund FAQs

- Large non-rural hospitals (400+ beds) may have capped support limits

Healthcare Connect Fund FAQs

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## SECTION 6

### Self-Assessment: Are We Potentially Eligible?

- We are a public or nonprofit healthcare entity
- We fall into one of the eligible HCP categories
- We have filed (or could file) Form 460
- We have reviewed our rurality status
- We have explored consortium participation
- We currently spend more than \$500/month on broadband

If you checked 3 or more:

You should evaluate this program further.

---

## SECTION 7

### Financial Impact Calculator

Fill In:

**Current Monthly Internet Cost: \$**

**Annual Internet Spend: \$**

**Estimated 65% Reduction: \$**

**5-Year Estimated Savings: \$**

If your annual broadband spend is \$12,000:

65% = \$7,800 saved annually

5-year total = \$39,000

That is not insignificant.

---

## SECTION 8

### Important Clarification About “Rural”

The FCC uses its own rural definition tools.

It does NOT use:

- State-level rural definitions
- General USDA rural maps
- Missouri “Am I Rural” website

The official determination occurs through USAC tools and FCC methodology

This is why assumptions are dangerous.

Verification matters.

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## Section 9

### When to Seek Guidance

You should consider speaking with a program specialist if:

- You are unsure about rural status
- You operate multiple sites
- You may qualify through consortium participation
- You are preparing competitive bid documentation
- You want to ensure compliance

Some FCC-registered service providers (holding 498 IDs) are authorized to participate in the program ecosystem

Working with experienced program participants can reduce risk and errors.

---

## REFLECTION EXERCISE

Have we ever evaluated FCC eligibility?

- Yes — and we determined we do not qualify
- Yes — and we are participating
- No — we assumed we did not qualify
- Not sure

If you selected:

“No” or “Not sure”

This warrants further evaluation.

---

## END OF CHAPTER 4 SUMMARY

1. The FCC Rural Health Care Program is real and active.
2. The Healthcare Connect Fund offers 65% broadband discounts.
3. Non-rural providers CAN qualify via majority-rural consortia.
4. The application process is structured but manageable.
5. Many nonprofits assume they are ineligible — incorrectly.

---

## END OF PART 1 SUMMARY

If you remember nothing else from this section, remember this:

1. Nonprofits often overpay.
  2. Entitlements exist.
  3. Cloud credits can reduce on-prem footprint.
  4. Cybersecurity is no longer optional.
  5. A roadmap changes everything.
-

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## PART 2

**“Free Money” and “Discounted Tech” — How Nonprofits Actually Get It**  
*(Entitlements + Subsidies + Grants, blended strategically)*

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**First, let's define the 3 buckets (so this stops feeling overwhelming)**

### **Bucket A — Entitlements (you qualify, you claim)**

These are programs where you're eligible because you're a nonprofit — but you must **apply/verify** and **activate**.

Examples:

- Microsoft 365 nonprofit licensing (including **free** and **discounted** tiers)
- Microsoft Azure annual grant (currently **\$2,000/year**, activation/renewal required)
- Google Ad Grants (up to **\$10,000/month** in search ads)
- Slack nonprofit program (free/discounted plan options based on size)

### **Bucket B — Subsidies (you still pay something, but less)**

These are programs that reduce your cost — often tied to broadband/connectivity, healthcare, education, or rural access.

Examples:

- FCC programs (RHC, E-Rate) (*Center4 already covers these in depth on your Programs section*)

### **Bucket C — Grants (competitive funding)**

These require applications, narratives, budgets, reporting. They can fund technology, cybersecurity, infrastructure, training, etc.

Examples:

- FEMA cybersecurity-related funding streams (varies by program and state administration)
- State broadband and digital equity programs

---

### **The #1 reason nonprofits miss benefits**

Because they don't know the “**verification gates**.”

Most programs don't start at "Apply for the discount."

They start at:

- » Are you a real nonprofit?
- » Can you prove it in the vendor's system?
- » Do you have the right account type / portal?
- » Did you renew / re-validate?

So we'll make this easy.

---

## MODULE 2.1 — THE NONPROFIT VERIFICATION STACK

*(The 4 gates you'll hit over and over)*

### Gate 1 — Proof you are a nonprofit

- 501(c)(3) determination letter (or equivalent nonprofit status documentation)
- EIN
- Organization legal name matches official records
- Address matches official records

### Gate 2 — "Nonprofit Verification" Platforms (where many discounts live)

You will commonly see these gatekeepers:

- **TechSoup** (major directory + validation layer)
- **Goodstack** (vendor verification used by some providers)

### Center4 Tip (plain English):

If a program requires TechSoup/Goodstack validation, you're not being "sold to." You're being asked to prove eligibility through a standard nonprofit pipeline.

### Gate 3 — Vendor portals (Microsoft/Google/etc.)

- Microsoft nonprofit portal access
- Google for Nonprofits enrollment
- Any required admin role assigned (someone must "own" the setup)

### Gate 4 — Renewal + avoiding accidental charges

Some grants/credits require **renewal** and can flip into pay-as-you-go if mismanaged (especially cloud credits). Microsoft explicitly documents activation and ongoing management for the Azure grant.

---

### Interactive: Your Verification Readiness Score

Give yourself points.

**0** = not done

**1** = partially done

**2** = complete

- We have our nonprofit documentation ready (EIN, determination letter). (0/1/2)
- We have TechSoup validation (or we know we need it). (0/1/2)
- We know who is the admin/owner for Microsoft/Google accounts. (0/1/2)
- We review renewals so credits/discounts don't expire or flip into paid plans unexpectedly. (0/1/2)

**Score total (0–8):** \_\_\_\_\_

- **0–2:** You're likely missing benefits
  - **3–5:** You're close — a few fixes unlock big savings
  - **6–8:** You're positioned to maximize entitlements and apply for larger programs
- 

## MODULE 2.2 — THE “BIG 6” ENTITLEMENTS MOST NONPROFITS SHOULD EVALUATE FIRST

*(Because they create fast financial relief)*

### 1) Microsoft 365 Nonprofit Offers (often the biggest immediate impact)

In plain English: Microsoft offers nonprofit pricing and grants that can significantly reduce licensing cost.

One key offer: Microsoft 365 Business Basic is listed as **grant/free for up to 300 users** on Microsoft's nonprofit plan page.

**What this can replace (in many orgs):**

- paid email hosting
- paid file sharing tools
- scattered collaboration apps

### Quick Fit Check (circle):

- We use Microsoft now / We use Google now / We use neither
- We pay for email hosting: Yes / No
- We pay for Zoom/Slack/other tools: Yes / No

### Action:

- Confirm nonprofit eligibility in Microsoft nonprofit portal
- Map staff roles to licensing tiers (don't overbuy)
- Turn on MFA and security defaults early (low effort, high value)

## 2) Microsoft Azure Annual Grant (Cloud Credit)

Microsoft's nonprofit materials describe an annual Azure grant of **\$2,000 (USD)** and provide activation guidance.

### What Azure credit is

A credit you can use to pay for eligible Azure services (like running a small virtual server, backups, storage, etc.)

### What it's great for (real nonprofit use cases):

- hosting a **small virtual machine** (VM) for a legacy app
- running a secure jumpbox for admin access
- storing backups offsite
- testing migrations without buying hardware

### Important "don't get burned" note:

Cloud credits require proper activation and ongoing management so you don't accidentally end up paying out-of-pocket. Microsoft's guidance emphasizes proper setup and billing profile management.

### Mini Worksheet: "Could Azure credit reduce my on-prem footprint?"

Circle all that apply:

- We have at least one on-prem server we're afraid to touch
- We pay for backup hardware / backup licensing
- We want to reduce onsite risk (theft, fire, failure)
- We need remote access to something internal
- We have a "one app" server that prevents full cloud adoption

If you circled **2+**, Azure credit deserves evaluation.

### 3) Google Ad Grants (Visibility Relief)

Google states Ad Grants provides **up to \$10,000/month** in free Search advertising.

In plain English: it's not money in your bank account — it's “free ad spend” to show up in search results for mission-related keywords.

#### Best uses:

- program awareness
- volunteer recruitment
- event registrations
- donor pipeline building
- driving traffic to high-value educational pages (like Center4 guides)

### 4) Slack for Nonprofits (Team Communication)

Slack's nonprofit program offers free/discounted upgrades depending on workspace size (≤250 can qualify for free Pro; larger orgs can qualify for steep discounts).

### 5) Identity & MFA Programs (Okta / Entra / Security Defaults)

For small nonprofits, Microsoft Security Defaults + MFA can create a huge safety jump with minimal configuration (Center4 already lists these as programs).

For larger nonprofits, Okta nonprofit pathways can support centralized access controls.

### 6) Website/Marketing Creation Relief (Canva, etc.)

These reduce the cost of building polished outreach materials and reduce staff time.

---

## MODULE 2.3 — WHERE NONPROFITS SHOULD DISCOVER PROGRAMS

*(So you aren't relying on random Google searches)*

### The “Discovery Loop” (simple weekly habit)

**Once per month** (30 minutes):

1. Check **Center4 Programs** (your 96-tile library)
2. Check TechSoup directories (discount discovery)
3. Check Goodstack (vendor discount hub)
4. Update your “Entitlements Tracker” (we’ll include a worksheet for this)

**Once per week** (10 minutes):

- scan Center4 updates / alerts
- scan grants calendar
- scan cybersecurity bulletins (CISA etc.)

**Once per quarter:**

- entitlement renewal review
- licensing rightsizing review
- internet contract review (this ties to Free ISP Quotes)

---

**INTERACTIVE TOOL:  
ENTITLEMENTS & PROGRAMS TRACKER**

Fill this in once, then maintain it quarterly.

**Program Name:**

**Category:**  Entitlement  Subsidy  Grant

**Eligibility Gate:**  TechSoup  Goodstack  Vendor Portal  Other

**Owner (Person):**

**Status:**  Not started  In progress  Active  Needs renewal

**Estimated Value / Savings:**

**Next Action:**

---

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## CHAPTER 5

### BROADBAND STRATEGY & TECHNOLOGY COST OPTIMIZATION

*(How to Stop Overpaying for Internet — and Build a Smarter Tech Roadmap)*

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## Why This Chapter Matters

For most nonprofits:

- Internet is the backbone of operations
- Cloud services depend on reliable bandwidth
- Telehealth depends on stable connectivity
- Remote staff depend on uptime
- Security tools require consistent access

Yet broadband contracts are often:

- Auto-renewed without review
- Overpriced
- Poorly benchmarked
- Outdated in speed or SLA
- Locked into unfavorable terms

This chapter will help you:

- ✓ Evaluate your current ISP intelligently
- ✓ Compare vendor quotes properly
- ✓ Reduce costs strategically
- ✓ Align broadband with long-term tech planning
- ✓ Understand how Center4 can assist with free vendor quoting

---

## PART 1

### Evaluating & Comparing Internet Providers (The Right Way)

---

#### Step 1: Understand What You Actually Have

Fill this out:

**Current Provider:**

**Connection Type:**  Fiber  Cable  DSL  Fixed Wireless  MPLS

**Speed:**        Mbps Down /        Mbps Up

**Monthly Cost:** \$

**Contract End Date:**

**Early Termination Fee:** \$

**Includes SLA?**  Yes  No

**Includes Static IPs?**  Yes  No

Now ask:

- Are we using 50% or less of our bandwidth?
- Are we experiencing latency issues?
- Do we have redundancy?
- Do we even know our SLA terms?

Many nonprofits discover:

They are paying enterprise rates for small-business service levels.

---

## **Step 2: What Should You Compare?**

When reviewing internet quotes, do NOT compare only price.

Compare:

### **1. Speed (Symmetrical vs Asymmetrical)**

Fiber = symmetrical (equal upload/download)

Cable = usually asymmetrical

For VoIP and cloud services:

Upload speed matters just as much as download speed.

---

### **2. SLA (Service Level Agreement)**

Look for:

- Uptime guarantees (99.9%+)
- Repair time commitments
- Packet loss thresholds
- Latency guarantees

If your provider does not offer a written SLA:

You may not be on a business-grade circuit.

---

### **3. Contract Length**

Typical:

- 12 months
- 24 months
- 36 months

Longer terms often mean lower pricing — but less flexibility.

---

#### 4. Installation Costs

Fiber builds can range from:  
\$0 (promotional)  
To several thousand dollars.

Always ask:

Is this waived?

Is this amortized?

Is construction required?

---

#### 5. Promotional Terms

Sometimes:

- First 3 months free
- Reduced first-year pricing
- Free equipment
- Waived install fees

These matter when evaluating true cost.

---

## PART 2

### The Free ISP Vendor Quote Service from Center4

---

One of the simplest ways to benchmark pricing is to get competitive quotes.

Center4 provides a completely free ISP, VoIP, and SD-WAN vendor quoting service.

**Here is how it works:**

- You submit your address and service requirements.
- Center4 sources quotes directly from major carriers and providers.
- Quotes are provided directly from the Internet Service Providers.
- Quotes are issued on the provider's official letterhead.
- There is no contract or agreement between your organization and Center4.
- You review pricing directly from the carriers themselves.

**Important Clarifications:**

- ✓ No markup is added by Center4.
- ✓ No agreement is signed between Center4 and the nonprofit.
- ✓ The nonprofit contracts directly with the provider.

Because of Center4 and AllSector Technology's strategic carrier partnerships:

Many nonprofits may receive:

- Discounted pricing
- Promotional terms
- Improved installation concessions
- Preferred contract options

This applies to:

- Dedicated Internet Access (Fiber)
- Cable Broadband
- MPLS / Private Circuits
- SD-WAN
- Hosted VoIP
- SIP Trunks

The service is available to ALL organizations — nonprofit or otherwise.

For nonprofits, this can be a meaningful cost-control mechanism.

---

**PART 3**

**Technology Cost Optimization Roadmap**

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Broadband is only one layer of cost control.

True optimization includes reviewing:

**Layer 1** – Connectivity

**Layer 2** – Infrastructure

**Layer 3** – Productivity

**Layer 4** – Security

**Layer 5** – Governance

(As introduced in Chapter 2.)

---

### **Step 1: Review Your Cloud Entitlements**

Are you using:

- Microsoft 365 nonprofit grants
- Azure annual credits
- Google Workspace nonprofit tier
- AWS nonprofit credits
- Cisco nonprofit discounts
- Zoom nonprofit discounts
- Slack nonprofit plan
- Salesforce nonprofit licenses

If not:

You are likely overpaying somewhere.

---

### **Step 2: Reduce On-Prem Footprint Strategically**

Example:

Microsoft Azure provides annual nonprofit credits.

Those credits can be used to:

- Host a small virtual server
- Move backup infrastructure to cloud
- Run a domain controller in Azure
- Test hybrid migration
- Host a secure application server

This can:

- Reduce hardware refresh cycles
- Reduce rack footprint
- Improve disaster recovery posture

Optimization is not always about cutting —  
It is about reallocating smarter.

---

### Step 3: Evaluate Redundancy

Do you have:

- A secondary ISP
- Automatic failover firewall
- LTE/5G backup
- Cloud backup
- Offsite backup testing

Downtime costs money.

Redundancy is part of optimization.

---

### Step 4: Vendor Rationalization

How many vendors are you paying monthly?

**List them:**

---

**Can:**

- Services be consolidated?
- Licensing be reduced?
- Duplicate tools be removed?

---

## PART 4

### SD-WAN & VoIP Considerations

---

As nonprofits adopt hybrid work and multi-site operations:

#### SD-WAN can:

- Optimize multi-location routing
- Improve failover
- Reduce MPLS dependence
- Improve VoIP quality

#### Hosted VoIP can:

- Eliminate on-prem PBX
- Improve call reporting
- Enable remote staff
- Reduce hardware lifecycle costs

Again, Center4 can provide free vendor comparisons for:

- ✓ VoIP
- ✓ SIP Trunks
- ✓ SD-WAN
- ✓ Multi-site connectivity

With no contractual obligation.

---

## PART 5

### Domain & Hosting Cost Optimization

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#### Another overlooked cost center:

Domains, SSL certificates, and hosting.

**AllSector Technology** maintains a public GoDaddy storefront:

<https://store.allsector.com>

**This storefront:**

- Is open to anyone
- Allows free account creation
- Provides discounted GoDaddy pricing
- Includes domains, hosting, SSL certificates, email, and related services

**There is:**

- ✓ No obligation
- ✓ No markup beyond storefront pricing
- ✓ No contract with Center4 required

For nonprofits building their first website —  
or refreshing their digital presence —

**This can provide:**

- Predictable discounted pricing
- Simplified procurement
- Direct purchase workflow

---

## COST OPTIMIZATION SELF-SCORE

**Score each area from 1–5:**

Internet pricing competitiveness:

Cloud entitlement usage:

Security maturity:

Vendor consolidation:

Redundancy planning:

**Total Score:**        / 25

Under 15?

There is opportunity.

---

## REFLECTION EXERCISE

### Have we:

- Benchmarked ISP pricing in the past 24 months?
- Reviewed contract auto-renewal terms?
- Leveraged nonprofit tech entitlements?
- Evaluated cloud credits?
- Reviewed SD-WAN options for multi-site operations?

### If 2 or fewer are checked:

This chapter should become an action plan.

---

## END OF CHAPTER 5 SUMMARY

1. Internet contracts should be benchmarked regularly.
  2. Quotes must be compared on SLA, not just price.
  3. Center4 provides free, direct-from-carrier quoting.
  4. Optimization includes cloud credits and vendor consolidation.
  5. Small cost adjustments compound over time.
-

---

## CHAPTER 6

### CYBERSECURITY MODERNIZATION FOR NONPROFITS

*(Protection, Insurance, and Governance in a Digital-First World)*

---

## Why This Chapter Matters

Nonprofits are no longer “unlikely targets.”

They are:

- Custodians of sensitive donor data
- Holders of protected health information (PHI)
- Managers of grant-funded systems
- Operators of cloud-based infrastructure
- Users of automation and AI tools

Cyberattacks are no longer rare events.

They are expected events.

Modern cybersecurity is not about paranoia.

It is about preparedness.

---

## SECTION 1

### The Nonprofit Risk Reality

Many nonprofit leaders believe:

“We are too small to be targeted.”

#### The truth:

- Automated phishing does not discriminate by size
- Ransomware attacks target weak controls
- Stolen credentials are often harvested opportunistically
- Grant funders increasingly require cybersecurity maturity

### Small and mid-sized nonprofits are frequently targeted because:

- They often lack dedicated security teams
- MFA is inconsistently deployed
- Policies are outdated or missing
- Cyber insurance requirements are misunderstood

---

## SECTION 2

### The Modern Cybersecurity Stack

Refer back to the 5-layer cake from Chapter 2.

Security does not sit in one layer.

It wraps around all of them.

---

### Layer 1 – Connectivity Security

Ask:

- Do we have a business-grade firewall?
- Is firmware updated regularly?
- Are admin interfaces exposed publicly?
- Do we use ISP-provided “free” routers for production?

Basic ISP routers are not enterprise firewalls.

---

### Layer 2 – Infrastructure Security

- Are servers patched monthly?
- Are backups tested quarterly?
- Are backups immutable or protected from ransomware?
- Are cloud workloads protected by role-based access?

Cloud does not mean secure by default.

Shared responsibility matters.

---

### Layer 3 – Identity & Productivity Security

- MFA enabled for all users?
- MFA enabled for admins?
- Conditional access policies in place?

- Legacy authentication disabled?
- Admin accounts separate from daily-use accounts?

Identity is now the primary attack surface.

---

#### Layer 4 – Endpoint Security

- Endpoint Detection & Response (EDR) deployed?
- Antivirus centrally managed?
- Devices encrypted?
- Lost device remote wipe capability enabled?

A laptop breach can expose thousands of donor records.

---

#### Layer 5 – Governance & Policy

- Acceptable Use Policy
- Incident Response Plan
- Data Retention Policy
- Access Control Policy
- Vendor Risk Assessment Process
- Annual Security Review

Technology without policy is fragile.

Policy without enforcement is theater.

---

## SECTION 3

### Cyber Insurance: The Hidden Driver of Modern Security

Many nonprofits now carry cyber liability insurance.

But most do not fully understand:

Insurance carriers now require:

- MFA enforcement
- Endpoint protection
- Admin account separation

- Backup testing
- Incident response documentation
- Email filtering controls

If these are misrepresented on application forms:

Claims can be denied.

---

## INSURANCE READINESS SELF-CHECK

- MFA enforced for all remote access
- MFA enforced for email access
- Privileged accounts documented
- Backup retention policy documented
- Incident response plan exists
- Annual security review performed

If you cannot check at least 4 of these:

Insurance renewal conversations may become difficult.

---

## SECTION 4

### Incident Response Planning (Before You Need It)

An incident response plan is not about panic.

It is about clarity.

#### Every nonprofit should document:

1. Who is notified internally?
  2. Who contacts legal counsel?
  3. Who contacts cyber insurance carrier?
  4. Who manages vendor communications?
  5. Who communicates externally (if required)?
-

## The 6 Phases of Incident Response

1. Preparation
2. Identification
3. Containment
4. Eradication
5. Recovery
6. Lessons Learned

Even a 3-page documented plan is better than none.

---

## INCIDENT RESPONSE EXERCISE

### If tomorrow:

- Your Microsoft 365 admin account was compromised
- A ransomware note appeared on your file server
- A donor database was accessed

Who would you call first?

---

**If you don't know — document it.**

---

## SECTION 5

### Governance Alignment

Security is not an IT issue.

It is a governance issue.

### Boards increasingly ask:

- Are we secure?
- Are we compliant?
- Are we insurable?
- Are we protecting donor trust?

## Technology governance should include:

### Quarterly:

- Security posture review
- Access review
- Backup verification

### Annually:

- Policy review
- Risk assessment
- Insurance review
- Vendor risk review

---

## BOARD REPORTING TEMPLATE (FILL-IN)

**Cyber Risk Rating (1–5):**

**MFA Adoption Rate:**        %

**Endpoint Coverage:**        %

**Backup Testing Date:**

**Incident Response Plan Updated:**

**Insurance Renewal Date:**

Board members do not need technical jargon.

They need clarity and accountability.

---

## SECTION 6

### Affordable Security Modernization Path

Many nonprofits believe:

“We can’t afford enterprise security.”

But:

- Microsoft nonprofit programs offer discounted security tiers
- Security awareness training may be discounted through nonprofit programs
- Some vendors offer nonprofit-specific pricing
- Cloud-native security tools reduce hardware spend

- Modernization does not mean buying everything at once.

It means:

Prioritize identity → endpoints → backup → governance.

---

## SECTION 7

### The Cost of Inaction

A breach can result in:

- Data loss
- Donor trust erosion
- Regulatory exposure
- Operational downtime
- Insurance denial
- Grant funding jeopardy

Cybersecurity is not overhead.

It is mission protection.

---

## CYBER MATURITY SELF-SCORE

Rate each 1–5:

**Identity Security**

**Endpoint Protection**

**Backup Maturity**

**Policy Documentation**

**Board Visibility**

**Total:      / 25**

**Under 15:**

Begin modernization roadmap.

---

---

## END OF CHAPTER 6 SUMMARY

1. Cybersecurity is governance, not just IT.
  2. Insurance requirements are tightening.
  3. Incident response plans are mandatory.
  4. Identity is the new perimeter.
  5. Prepared nonprofits recover faster.
-

---

CHAPTER 7

AI & AUTOMATION FOR NONPROFITS

*(Innovation with Intent, Governance, and Practical Impact)*

---

## Why This Chapter Matters

Artificial Intelligence is no longer experimental.

It is operational.

### Nonprofits are already using AI for:

- Grant drafting
- Donor segmentation
- Volunteer coordination
- Policy writing
- Board reporting
- Data analysis
- Marketing automation

### The real question is not:

“Should we use AI?”

### The real question is:

“How do we use AI responsibly, securely, and strategically?”

---

## SECTION 1

### What AI Actually Is (In Plain Terms)

AI in nonprofits typically falls into three categories:

#### 1. Generative AI

Creates content.

Examples:

- Drafting grant narratives
- Writing donor emails
- Summarizing meeting notes
- Generating policies

### Tools include:

- ChatGPT
- Microsoft Copilot

- Google Gemini
  - Claude
- 

## 2. Analytical AI

Analyzes patterns and data.

Examples:

- Predicting donor churn
  - Segmenting donor lists
  - Forecasting fundraising outcomes
  - Identifying high-risk compliance gaps
- 

## 3. Workflow Automation

Connects systems together.

Examples:

- Form submission → CRM entry → email response
- Volunteer signup → SMS notification → database entry
- Grant awarded → accounting entry → reporting workflow

Tools may include:

- Zapier
- Power Automate
- Airtable
- Salesforce automation tools

AI does not replace your mission.

It reduces friction around it.

---

## SECTION 2

### The Risk of Unmanaged AI

Many nonprofits are already using AI informally.

Staff may be:

- Uploading board documents into public AI tools
- Drafting policies using unknown platforms
- Copying donor data into prompts
- Generating content without review

**This creates risks:**

- Data leakage
- Confidential information exposure
- Hallucinated (incorrect) outputs
- Intellectual property concerns
- Policy non-compliance

AI governance must mature alongside adoption.

---

## SECTION 3

### The AI With Intent Framework

**Responsible AI use requires 4 pillars:**

---

#### **Pillar 1 – Data Awareness**

Before using AI tools, ask:

- Are we entering donor data?
- Are we entering PHI?
- Are we entering internal financials?
- Are we entering board-sensitive information?

**If yes:**

Use enterprise-approved platforms only.

---

#### **Pillar 2 – Access Controls**

- Who is authorized to use AI tools?
- Are we using personal accounts or organization accounts?

- Are logs retained?
- Are admin controls enabled?

Identity and AI governance must align.

---

### **Pillar 3 – Output Review**

AI outputs should always be:

- Reviewed
- Fact-checked
- Edited
- Contextualized

AI drafts.

Humans approve.

---

### **Pillar 4 – Policy & Documentation**

Every nonprofit should consider:

- AI Acceptable Use Policy
- Data Handling Guidelines
- Staff Training
- Board-Level AI Awareness

Innovation without documentation creates exposure.

---

## **SECTION 4**

### **Practical AI Use Cases for Nonprofits**

Here are safe, high-impact areas to begin:

---

#### **1. Grant Draft Acceleration**

AI can:

- Rewrite existing narratives

- Suggest budget justification language
- Improve readability
- Align language to funder priorities

Time savings: significant.

---

## 2. Donor Communications

AI can:

- Draft segmented donor emails
  - Suggest social media campaigns
  - Create event copy
  - Generate thank-you letters
- 

## 3. Policy Drafting

AI can:

- Draft Acceptable Use Policies
- Draft Incident Response Plans
- Draft Vendor Risk Assessments
- Create onboarding documentation

Always review before publishing.

---

## 4. Meeting Summaries

AI meeting assistants can:

- Transcribe
  - Summarize
  - Extract action items
  - Create task lists
- 

## 5. Reporting & Board Deck Support

AI can:

- Summarize financial reports
  - Create executive summaries
  - Identify trends
  - Draft board-ready bullet points
- 

## SECTION 5

### Automation: The Force Multiplier

AI is powerful.

Automation is transformative.

#### Examples:

##### Volunteer Intake Workflow:

Form → CRM → Email → Slack Notification → Dashboard Update

##### Grant Tracking:

Award Received → Budget Entry → Reporting Reminder → Executive Alert

##### Donor Lifecycle:

Donation → Thank You Email → CRM Update → 30-Day Follow-Up Reminder

#### Automation reduces:

- Manual entry
  - Missed follow-ups
  - Staff burnout
  - Reporting delays
- 

## SECTION 6

### AI & Cybersecurity Overlap

#### AI can introduce new risks:

- Prompt injection attacks
- Over-permissioned AI access
- Data oversharing
- Model misconfiguration

AI should not have broader access than the requesting user.

AI responses are limited by user permissions.

**That means:**

Weak identity controls → greater AI exposure.

Identity maturity from Chapter 6 directly impacts AI safety.

---

## SECTION 7

### AI Insurance & Legal Implications

Cyber insurance carriers are beginning to ask:

- Do you use AI tools?
- How is data controlled?
- Is there an AI policy?

Misuse of AI in regulated environments (HIPAA, FERPA, etc.) can create liability.

AI governance is quickly becoming a compliance conversation.

---

## SECTION 8

### AI Readiness Self-Assessment

**Score 1–5:**

We have an AI use policy

We use enterprise-approved AI tools

Staff trained on AI risks

Board aware of AI usage

AI integrated into workflow strategically

**Total:      / 25**

**Under 10:**

AI use is likely informal and unmanaged.

---

### The Balance: Efficiency vs Responsibility

#### AI can:

- Save hours per week
- Increase grant output
- Improve donor engagement
- Improve reporting clarity

#### But only if:

Security + governance + identity controls are mature.

Innovation should follow structure.

Not precede it.

---

## REFLECTION EXERCISE

#### If AI disappeared tomorrow:

What manual processes would collapse?

#### If AI usage doubled tomorrow:

What policies would protect you?

---

## END OF CHAPTER 7 SUMMARY

1. AI is already present in nonprofits.
2. Governance must evolve with adoption.
3. Automation reduces operational friction.
4. Identity maturity protects AI workflows.
5. Responsible innovation builds long-term trust.

---

## CHAPTER 8

# BUILDING A 3-YEAR NONPROFIT TECHNOLOGY ROADMAP

*(From Reactive Spending to Strategic Investment)*

---

## Why This Chapter Matters

Most nonprofits do not have a technology plan.

They have:

- Renewals
- Emergencies
- Vendor emails
- Budget surprises
- Security scares

A roadmap changes everything.

### It turns:

- Random upgrades

### Into

- Intentional transformation

### A 3-year roadmap allows you to:

- ✓ Align with mission growth
- ✓ Anticipate hardware refresh cycles
- ✓ Plan grant timing
- ✓ Align cybersecurity with insurance
- ✓ Budget proactively
- ✓ Avoid “panic purchases”

This chapter will walk you through building one.

---

## SECTION 1

### What a Technology Roadmap Is (And What It Isn't)

#### A roadmap is not:

- A vendor proposal
- A 200-page IT audit
- A list of tools you wish you had

#### A roadmap is:

A phased plan aligned to mission, funding, risk, and capacity.

**Think of it as:**

A mission-aligned technology investment timeline.

---

## SECTION 2

### Step 1 – Assess Your Current State

Before planning forward, document today.

**Fill This In:**

**Internet Provider:**

**Contract End Date:**

**Firewall Age:**

**Servers On-Prem:**

**Cloud Providers:**

**Microsoft / Google Tier:**

**MFA Enabled Org-Wide?**  Yes  No

**Endpoint Protection Platform:**

**Backup System:**

**AI Tools In Use:**

**Now rate overall maturity:**

**Connectivity** /5

**Security** /5

**Cloud Adoption** /5

**Automation** /5

**Governance** /5

**Total:** /25

**Under 15:**

Modernization required.

---

## SECTION 3

### Step 2 – Identify Strategic Drivers

**Roadmaps should align to mission growth.**

**Ask leadership:**

- Are we opening new locations?
- Are we expanding telehealth?
- Are we increasing remote staff?
- Are we launching new programs?
- Are we applying for larger grants?
- Are we increasing donor engagement campaigns?

Technology should support growth — not lag behind it.

---

## SECTION 4

### The 3-Year Model Framework

#### YEAR 1 – Stabilize & Secure

**Focus:**

Foundation and risk reduction.

**Priorities may include:**

- Enforce MFA organization-wide
- Replace outdated firewall
- Modernize endpoint protection
- Benchmark ISP pricing
- Explore FCC subsidy eligibility
- Activate cloud credits
- Document incident response plan
- Implement nonprofit licensing entitlements

**Goal:**

Reduce risk.

Control costs.

Strengthen baseline.

---

## YEAR 2 – Optimize & Automate

### Focus:

Efficiency and workflow maturity.

### Priorities may include:

- **Implement automation workflows**
- **Improve donor CRM integration**
- **Deploy secure remote access upgrades**
- **Consolidate vendors**
- **Introduce AI governance framework**
- **Improve backup redundancy**
- **Implement SD-WAN for multi-site organizations**

### Goal:

Increase efficiency.

Reduce manual workload.

Improve visibility.

---

## YEAR 3 – Innovate & Scale

### Focus:

Strategic enablement.

### Priorities may include:

- **Expand telehealth infrastructure**
- **Build hybrid cloud architecture**
- **Implement advanced analytics**
- **Mature board reporting dashboards**
- **Expand AI-assisted operations**
- **Evaluate advanced security monitoring**

### Goal:

Position technology as a mission multiplier.

---

## SECTION 5

### Budget Planning Across 3 Years

### Instead of reactive spending:

Create forecast bands.

#### Example:

**Year 1 Estimated Investment: \$**

**Year 2 Estimated Investment: \$**

**Year 3 Estimated Investment: \$**

Now overlay potential offsets:

- Microsoft nonprofit licensing
- Azure credits
- FCC broadband subsidy
- Google Ad Grants
- Vendor nonprofit discounts
- Hardware donation programs

Roadmaps become affordable when entitlements are layered strategically.

---

## SECTION 6

### Contract & Renewal Timing Strategy

#### List upcoming renewals:

**Internet:**

**Firewall License:**

**Endpoint Security:**

**Backup:**

**CRM:**

**Cyber Insurance:**

Align renewal dates with roadmap phases.

#### Example:

If firewall renewal is in 6 months:

Plan Year 1 modernization accordingly.

Do not let contracts dictate your strategy.

---

## SECTION 7

### Risk Reduction Timeline

#### Create a simple risk ladder:

##### High Risk:

- No MFA
- No tested backups
- Unsupported server OS
- No cyber insurance

##### Medium Risk:

- Outdated endpoint protection
- No vendor risk review

##### Low Risk:

- Policy refresh needed

Your Year 1 focus should eliminate high-risk items first.

---

## SECTION 8

### Board-Level Alignment

#### Present roadmap visually:

**Year 1** – Secure

**Year 2** – Optimize

**Year 3** – Scale

#### Boards appreciate:

- » Clear priorities
- » Budget forecasting
- » Risk reduction
- » Funding offsets
- » Strategic alignment

Technology should not appear as unpredictable expense.

It should appear as structured investment.

---

## SECTION 9

### Roadmap Template (Fill-In Page)

Mission Priorities (3-Year Vision):

---

#### Year 1 Top 5 Initiatives:

- 1.
- 2.
- 3.
- 4.
- 5.

#### Year 2 Top 5 Initiatives:

- 1.
- 2.
- 3.
- 4.
- 5.

#### Year 3 Top 5 Initiatives:

- 1.
- 2.
- 3.
- 4.
- 5.

Funding Offsets Identified:

Estimated Savings Through Optimization:

---

## SECTION 10

### Common Roadmap Mistakes

- Trying to modernize everything at once
- Ignoring security until after innovation
- Forgetting contract expiration dates
- Failing to involve leadership
- Not documenting decisions

Roadmaps fail when they remain in someone's head.

Write it down.

Review it quarterly.

---

## REFLECTION EXERCISE

### If we followed no roadmap:

Where will we be in 3 years?

---

### If we follow one intentionally:

What changes?

---

## END OF CHAPTER 8 SUMMARY

1. A roadmap replaces reactive spending.
2. Year 1 = Stabilize.
3. Year 2 = Optimize.
4. Year 3 = Scale.
5. Entitlements + subsidies reduce cost burden.

---

CHAPTER 9

BRINGING IT ALL TOGETHER

*(From Overwhelmed to Intentional)*

---

## You Made It Here

If you've read this far, you've already done something many nonprofit leaders never do:

You stepped back.

You looked at technology strategically — not reactively.

## You moved from:

- › Vendor emails
- › Contract renewals
- › Emergency upgrades
- › Insurance questionnaires

## To:

- › Structured planning
- › Entitlement awareness
- › Risk reduction
- › Roadmapping
- › Responsible innovation

This is transformation.

---

## SECTION 1

### The 5 Realizations That Change Everything

Throughout this playbook, five major themes emerged.

#### 1. Nonprofits Often Overpay

Because:

- › Contracts auto-renew
- › Entitlements go unclaimed
- › Vendor discounts aren't explored
- › Broadband isn't benchmarked
- › Cloud credits go unused

Awareness alone creates savings.

---

## 2. Entitlements Exist — But Must Be Claimed

You are not asking for charity.

You are activating programs designed for nonprofits.

These include:

- Microsoft nonprofit licensing
- Azure annual credits
- Google Ad Grants
- Cisco & hardware discounts
- AWS nonprofit credits
- FCC broadband subsidies
- Security training discounts
- CRM and productivity discounts

They do not activate automatically.

They require initiative.

---

## 3. Cybersecurity Is Governance

It is no longer optional.

It is:

- Insurance-driven
- Board-relevant
- Grant-sensitive
- Donor-trust critical

Security maturity protects mission continuity.

---

## 4. AI & Automation Are Tools — Not Threats

Used responsibly, AI can:

- Accelerate grants
- Improve donor engagement
- Improve reporting

- Reduce staff burnout

But governance must come first.

Innovation without structure creates exposure.

---

## 5. A Roadmap Changes the Tone of Leadership

When technology becomes:

- Predictable
- Planned
- Budgeted
- Risk-managed

Boards relax.

Staff stabilize.

Growth becomes intentional.

---

## SECTION 2

### The Nonprofit Technology Maturity Shift

**You likely started this book in one of these states:**

- **Overwhelmed**
- **Reactive**
- **Unsure what programs existed**
- **Unsure what risk level you were at**
- **Unsure how to plan forward**
  
- **Informed**
- **Strategic**
- **Intentional**
- **Structured**
- **Ready to act**

**That is the shift.**

---

## SECTION 3

### Your First 90-Day Action Plan

Do not try to fix everything.

#### Start here:

##### Month 1:

- Benchmark internet pricing
- Review entitlements checklist
- Confirm MFA enforcement

##### Month 2:

- Review backup testing
- Draft or update incident response plan
- Identify expiring contracts

##### Month 3:

- Build 3-year roadmap draft
- Present technology overview to board
- Identify funding offsets

Small action compounds.

---

## SECTION 4

### You Are Not Alone

Technology can feel isolating in nonprofits.

Many leaders are:

- Executive Directors with no IT background
- Program directors managing cloud platforms
- Finance leaders handling cyber insurance
- Boards trying to understand risk

This is why shared knowledge matters.

This is why centralized resources matter.

This is why initiatives like Center4 exist.

---

## SECTION 5

### The Role of Center4 in Your Journey

#### Center4 was built to:

- Surface nonprofit technology entitlements
- Break down eligibility complexity
- Provide funding pathway education
- Help organizations benchmark connectivity
- Offer free ISP / VoIP / SD-WAN vendor comparisons
- Simplify cost optimization
- Provide guides and templates

It is free.

It is educational.

It is structured for nonprofit leaders — not engineers.

And when additional guidance is needed, partnerships and aligned service providers may be available to assist in specific program navigation.

---

## SECTION 6

### Technology as a Mission Multiplier

#### Technology should not:

- Drain resources
- Create fear
- Cause constant disruption

#### It should:

- Expand access
- Protect data
- Improve communication
- Increase funding capacity
- Reduce administrative friction

### When aligned correctly:

Technology becomes quiet.

And mission becomes louder.

---

## SECTION 7

### Reflection

### Three years from now:

#### Will you be:

- Reacting to incidents
- Renewing contracts blindly
- Guessing about risk

#### Or will you be:

- Executing a roadmap
- Leveraging entitlements
- Operating securely
- Using AI responsibly
- Presenting clarity to your board

That choice begins now.

---

## SECTION 8

### The Center4 Strategic Action Framework (Summary)

1. Assess your current state.
2. Activate entitlements.
3. Secure identity first.
4. Benchmark broadband.
5. Align contracts to roadmap.
6. Implement governance.

7. Introduce AI intentionally.
8. Review quarterly.
9. Present annually.
10. Repeat.

This is not a one-time exercise.

It is a cycle.

---

## FINAL EXERCISE (PRINTABLE PAGE)

### Write Your Commitment:

**In the next 30 days, we will:**

**In the next 12 months, we will:**

**By Year 3, we will:**

**Signed:**

**Executive Director:** \_\_\_\_\_

**Board Chair:** \_\_\_\_\_

**Technology Lead:** \_\_\_\_\_

**Date:** \_\_\_\_\_

---

## FINAL THOUGHT

Nonprofits exist to serve.

Technology exists to support service.

When technology becomes intentional, structured, and aligned —

It disappears into the background.

And impact moves to the foreground.

Thank You,

center 4

**ALLSECTOR**  
TECHNOLOGY