



Unlimited Possibilities: Optimizing Tech Resources



Melanie Meyer
Managing Director of Customer Success
Tech Impact

Breakout Session

AGENDA

1. Technology Planning
2. Assessing Your Current Technology
3. Creating an Action Plan



MELANIE MEYER

Managing Director of Customer Success, Tech Impact

Melanie Meyers has worked in the nonprofit sector for over 25 years and is passionate about using technology solutions to solve community-based issues.

At Tech Impact, Melanie oversees the account Management team for Managed Service customers, and supports internal process creation and onboarding for new organizations.

**WE'RE A NONPROFIT ON A
MISSION TO LEVERAGE
TECHNOLOGY TO ADVANCE
SOCIAL IMPACT.**



WE DO THIS BY DELIVERING TECH SERVICES, EDUCATION, AND TRAINING THAT HELP NONPROFITS AND COMMUNITIES THRIVE.



NONPROFIT TECH SERVICES:

- Impartial advice
- Well-aligned solutions
- Adopt technology that fulfills missions



NONPROFIT EDUCATION & TRAINING:

- Unbiased research
- Easy-to-understand
- One-to-many approach



WORKFORCE DEVELOPMENT:

- Hands-on experience
- Launching careers
- Improved quality of life

TECHNOLOGY LEARNING CENTER

techimpact.org/technology-learning-center/



slido



In three words or less, describe your biggest challenge with Technology.

ⓘ Start presenting to display the poll results on this slide.

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How many staff at your organization?

ⓘ Start presenting to display the poll results on this slide.



SIXTH EDITION

Nonprofit Trends Report

How nonprofits around the world are embracing change, overcoming challenges, and harnessing opportunities



*“Digitally mature nonprofits outperform their peers, regardless of their organization’s revenue, employee headcount, or geographic location. **Organizations with high digital maturity are 1.9x more likely (93% vs. 50%) to have experienced improvements in organizational efficiency or mission impact.** They are also 3.5x more likely (38% vs. 11%) to have achieved mission goals compared to their peers with low digital maturity.”*

— 5th Edition of Nonprofit Trends Report (2022)

[The Fifth Edition of the Nonprofit Trends Report \(salesforce.org\)](https://salesforce.org)

Nonprofits are Unprepared

\$30 Billion

Funds raised by NGOs and nonprofits each year. They often don't have the necessary security measures in place, making them attractive to hackers.

9 out of 10

organizations **do not** train staff regularly on cybersecurity

75%

of organizations **do not** monitor their networks








80%

of organizations **do not** have any cybersecurity plan⁴



Other Impacts on Nonprofit Operations from Cyberattacks

Cyber incidents, from data breaches to website takeovers, can plague nonprofits. Consequences are significant and costly, including:

-  Identity theft
-  Reputation harm/loss
-  Precious funds have to be used to recover data
-  Spreading of politically motivated messages or malicious information
-  Holding the organization to scrutiny because of identified vulnerabilities in its cybersecurity
-  Disruption in the ability to carry out activities
-  Exposing sensitive data on donors and stakeholders



22 days

Average length of interruption after ransomware attacks⁵

“Staying ahead of [cyber risk] really comes down to you as a board member knowing the right questions to ask.”

Brian Stafford
Diligent CEO



TECHNOLOGY PLANNING



TECHNOLOGY PLANNING

Like a Strategic Plan or a Marketing Plan, a Technology Plan helps you plot out your direction and priorities.



PUT TOGETHER A COMMITTEE

Include:

- IT Staff
- Chief Executive
- Executive representative of each function
- Support Staff Member
- Consultant

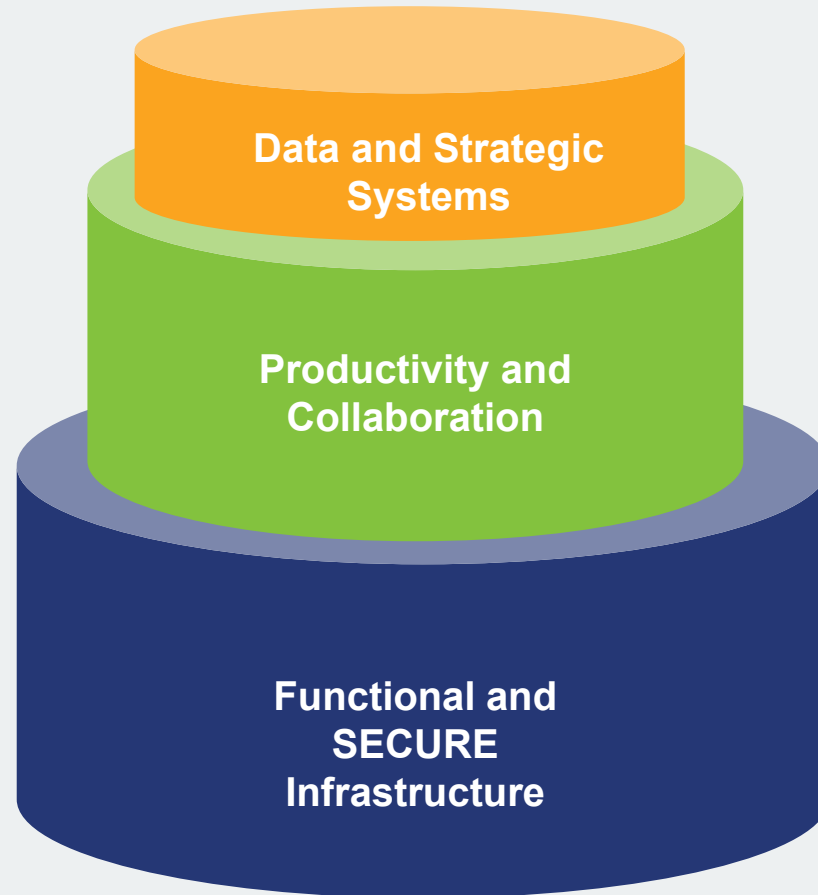


Consider survey to all staff to capture input.



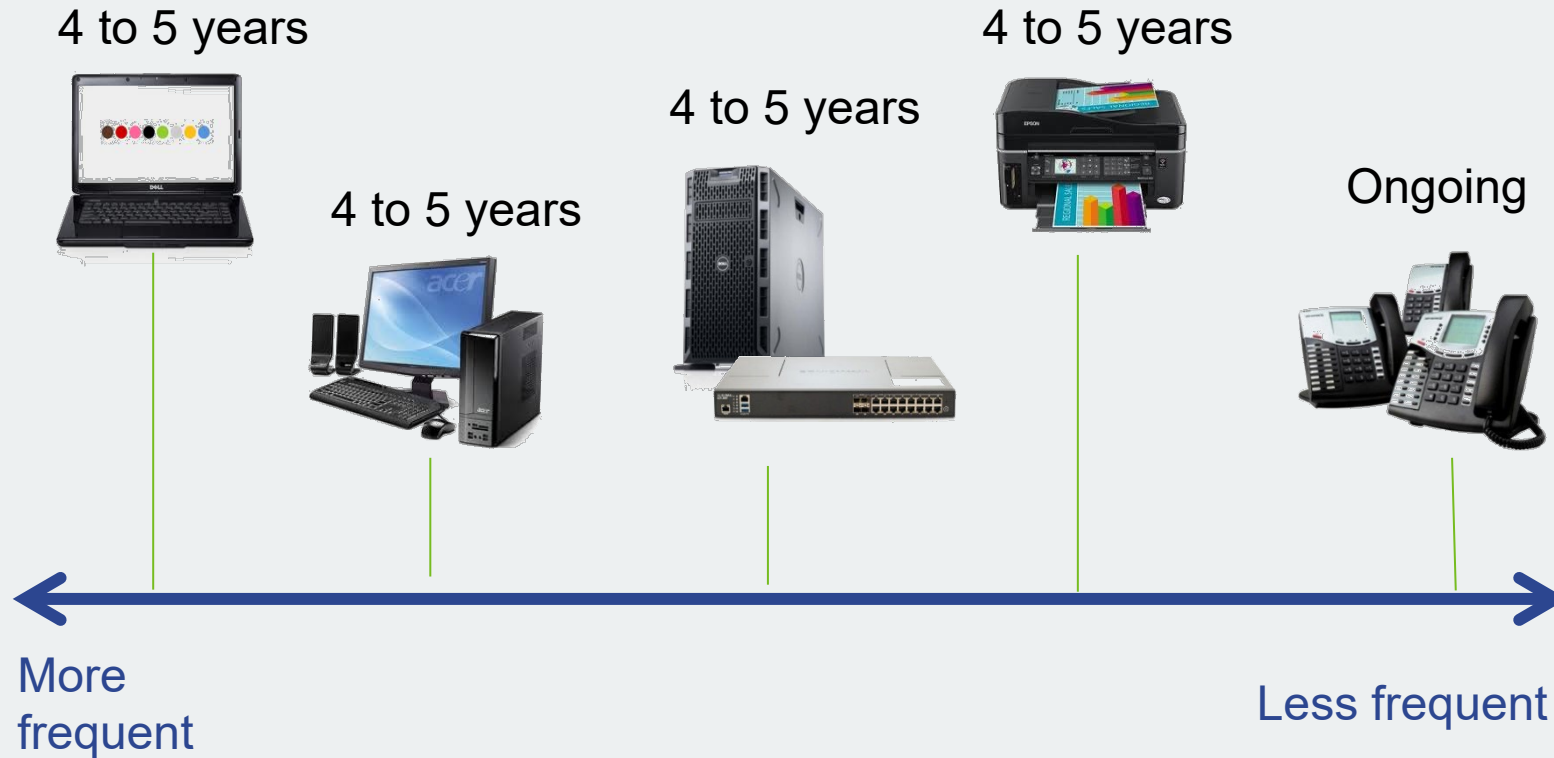
ASSESSING YOUR CURRENT TECHNOLOGY

ASSESS YOUR CURRENT TECHNOLOGY



- **Ensure IT Oversight**
- **Policies and Procedures**
- **User Training**
- **Support**

REPLACEMENT CYCLES ARE ESSENTIAL TO A STRONG INFRASTRUCTURE





PC PURCHASING

1. Standardize
2. Set replacement cycle (5 years)
3. Budget

Nonprofit Discount Purchasing

1. [Tech Impact Lenovo Affinity Site](#)
2. [Tech Soup](#)
3. [Amazon Business for Nonprofits](#)

October 14, 2025



Windows 10 Home and Pro follows the Modern Lifecycle Policy. This applies to the following editions: Home, Pro, Pro Education, Pro for Workstations Important Windows 10 will reach end of support on **October 14, 2025**.



Professional

DO NOT BUY HOME OS GO PRO

Pro includes tools needed in professional environments around security, including encryption tools and business management and deployment tools.

Operating system upgrade license. Cost is \$16 through Tech Soup (one license per workstation): [Windows Pro Full Operating System – No Software Assurance \(techsoup.org\)](https://techsoup.org)

PC BUILD RECOMMENDATIONS

	Light User (Est. \$800)	Standard User (Est. \$1,000)	Power User (Est. 1,400)
Processor – bare minimum	12th Generation Intel® Core™ i3-1215U Processor (3.30 GHz up to 4.40 GHz)	12th Generation Intel® Core™ i5-1235U Processor (3.30 GHz up to 4.40 GHz)	Processor: 12th Generation Intel® Core™ i7-1255U Processor (E-cores up to 3.50 GHz P-cores up to 4.70 GHz)
Total Memory	8 GB DDR4-3200MHz (Soldered) + 8 GB DDR4-3200MHz (SODIMM)	8 GB DDR4-3200MHz (Soldered) + 8 GB DDR4-3200MHz (SODIMM) (16GB Total, this can be increased)	32 GB DDR4-3200MHz (SODIMM) - (2 x 16 GB) (32GB Total, this can be increased)
Solid State Drive:	256 GB SSD	512 GB SSD	:512 GB SSD or 1TB SSD

Always purchase onsite warranty upgrade. Minimum 3 year.

RATE YOUR INFRASTRUCTURE

Topic	Effective	Needs Work	Priority
We have clear staff oversight for IT.			
Workstations are under 5 years old and running Windows 10/11 PRO with a minimum operating of 8GB of RAM or more.			
Workstations are kept up-to-date with basic security and policies.			
We have a PC replacement schedule and budget.			
PC support is timely and effective.			
Server and network equipment is under 5 years old and kept up-to-date with basic security.			
Server is currently backed up and we have a disaster recover plan in place should there be a technology failure.			
Internet is reliable and fast.			
Phone system is meeting need and can support future needs.			
Policies exist for use of technology.			
We provide onboarding training and ongoing IT training for staff.			
We are pro active with securing our data and have necessary protection in place.			
We provide staff with cyber security training.			

CREATE IT POLICIES

Examples include:

- Acceptable Use
- BYOD
- Social Media
- Data Sharing

Policies do not have to be long, detailed, or complex.

[Nonprofit Technology Policy Workbook](#)

NONPROFIT TECHNOLOGY POLICY WORKBOOK

UPDATED FOR AUGUST 2020

 **TECHIMPACT**[®]
IDEALWARESM

LET'S ANSWER SOME QUESTIONS!



PRODUCTIVITY AND COLLABORATION

Do staff have the software they need to get their job done?

Is software up-to-date?

Are staff able to work remotely?

How are staff and teams collaborating?

Does staff need more training?

Are you using a unified system?





Microsoft 365 Business Basic (Nonprofit Staff Pricing)

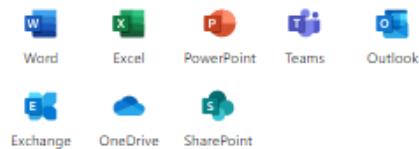
Grant
Free for up to 300 users

[Get started](#)

[Learn more](#)

- ✓ Chat, call, meet up to 300 attendees with Microsoft Teams
- ✓ Web and mobile versions of Office apps
- ✓ 1 TB of cloud file storage
- ✓ Business-class email
- ✓ Standard security
- ✓ Anytime phone and web support

Apps and services included ^{4.5}



Microsoft 365 Business Standard (Nonprofit Staff Pricing)

\$3.00 user/month
(annual commitment)

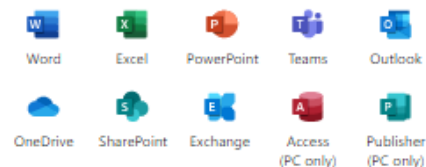
[Get started](#)

[Learn more](#)

Everything in Business Basic, plus:

- ✓ Desktop versions of Office apps with premium features
- ✓ Webinar hosting in Teams
- ✓ Attendee registration and reporting tools
- ✓ Manage customer appointments

Apps and services included



Best value

Microsoft 365 Business Premium (Nonprofit Staff Pricing)

Grant
Free for up to 10 users

\$5.50 user/month
(annual commitment)

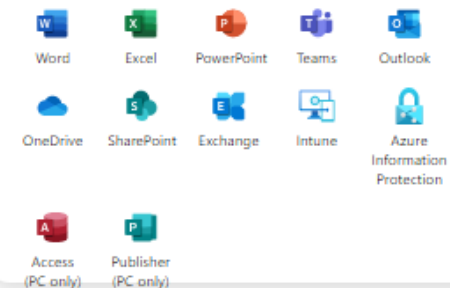
[Get started](#)

[Learn more](#)

Everything in Business Standard, plus:

- ✓ Advanced security
- ✓ Cyberthreat protection
- ✓ Advanced device management

Apps and services included





NONPROFIT-ONLY OFFER

Google Workspace for Nonprofits

\$0 USD

/ user / month

- ✓ Professional email addresses at your nonprofit's domain
- ✓ 100 participant video meetings
- ✓ 30 GB cloud storage per user
- ✓ Security and management controls
- ✓ Standard support

Business Standard

\$3.00 USD / user / month

75% off standard pricing

- ✓ Professional email addresses at your nonprofit's domain
- ✓ 150 participant video meetings + **recording**
- ✓ 2 TB cloud storage per user
- ✓ Security and management controls
- ✓ Standard support (paid upgrade to Enhanced Support)

Business Plus

\$5.04 USD / user / month

72% off standard pricing

- ✓ Professional email addresses at your nonprofit's domain + **eDiscovery, retention**
- ✓ 250 participant video meetings + recording, **attendance tracking**
- ✓ 5 TB cloud storage per user
- ✓ **Enhanced security and management controls, + Vault, advanced endpoint management**
- ✓ Standard support (paid upgrade to Enhanced Support)

Enterprise

70%+ off

standard pricing for Enterprise editions

- ✓ Professional email addresses at your nonprofit's domain + **eDiscovery, retention, S/MIME encryption**
- ✓ 250 participant video meetings + recording, attendance tracking, **noise cancellation, in-domain live streaming**
- ✓ As much storage as you need
- ✓ Advanced security, management, and compliance controls, including Vault, **DLP, data regions, and enterprise endpoint management**
- ✓ **Enhanced Support** (paid upgrade to Premium Support)

FILE STORAGE



box.ORG

Remote file access and
document collaboration

EGN^YTE

RATE YOUR PRODUCTIVITY AND COLLABORATION

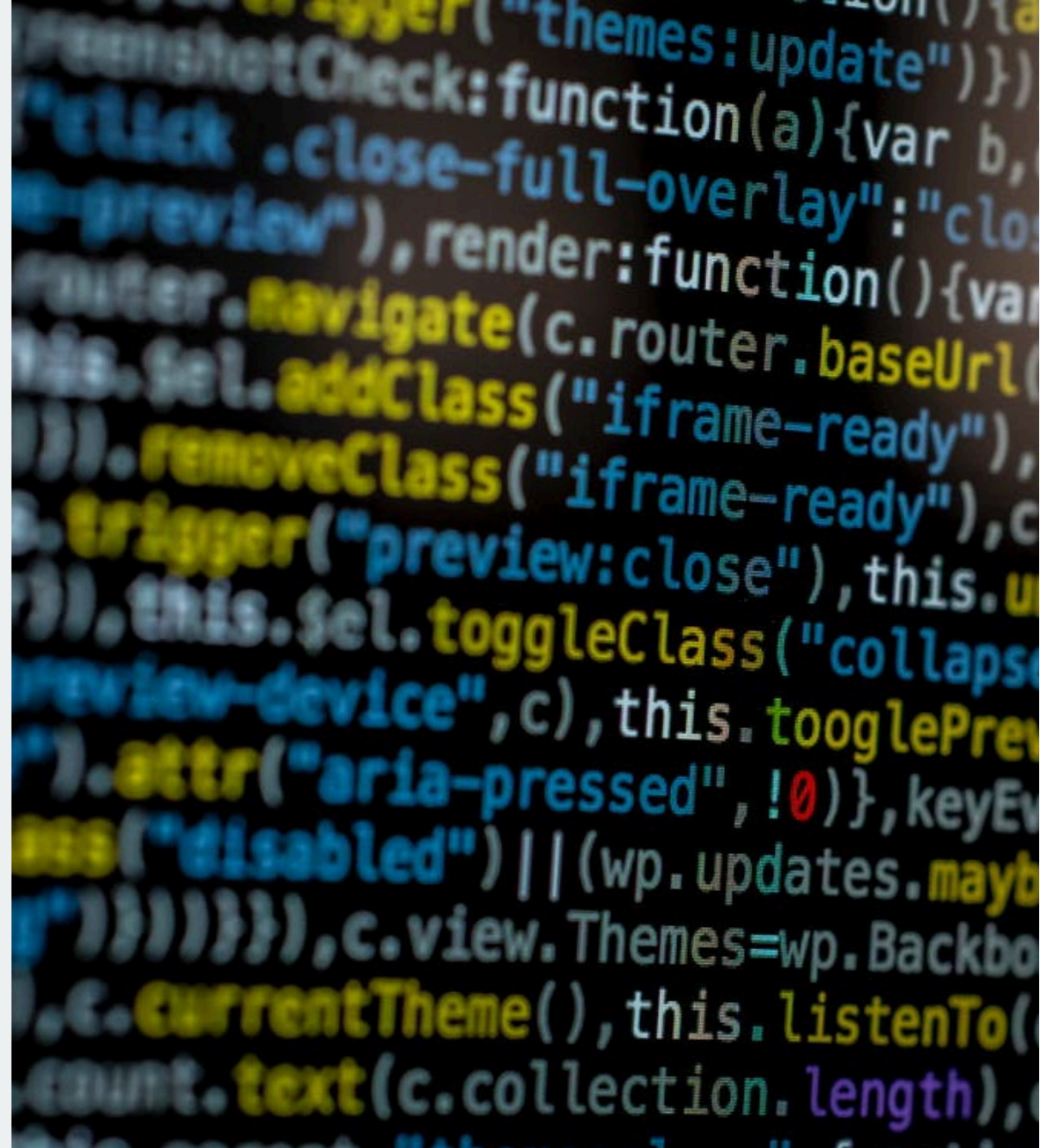
Topic	Effective	Needs Work	Priority
We are using a unified system for email, calendar and file sharing.			
Our system supports collaboration and sharing, including easy remote access.			
Instant messaging platform in widely used.			
Staff can create screen share meetings on demand			
Policies and procedure exist on how to use systems and proper use.			
Ongoing training provided to staff.			
Can we easily add and remove users.			
When a staff member leaves, we can remove organization information from their personal devices.			
We have Multi Factor Authentication setup for users accessing our systems.			
We have a system to conduct conference/video calls with individuals outside our organization.			



SECURITY

SECURITY

- Hardware/Software Security Patches
- Use Multi Factor Authentication
- Endpoint Antivirus on Computers, Antimalware, Web Protection
- Encrypt Email
- Phishing /Safe Attachment Scanning for Email
- Cyber Security Awareness and Training for staff
- SSO and/or Password Vaults/Managers
- Control admin Access
- Backup



DMARC, DKIM, SPF

DMARC, DKIM, SPF are essential email authentication methods that help verify the legitimacy of email senders and prevent spam, phishing attacks, and unauthorized parties from sending emails on behalf of a domain.

If domains **haven't set up DMARC, DKIM, SPF** correctly, their **emails may be quarantined or not delivered** to recipients, and **spammers could impersonate** them.



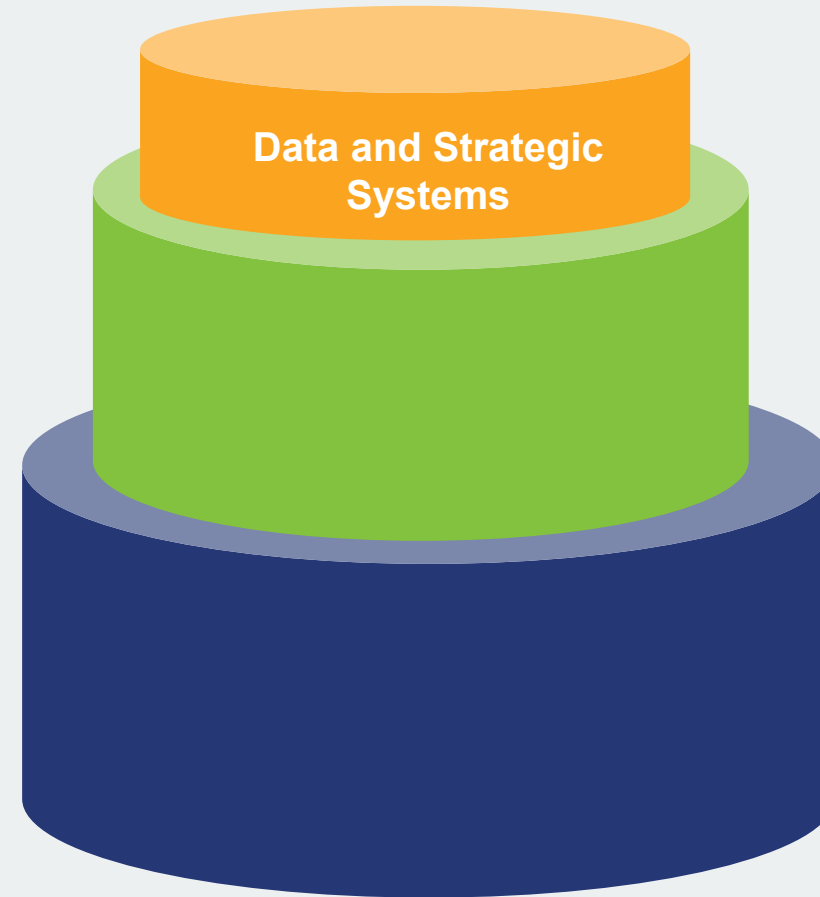
In their latest **email** guidelines, Google has enforced email authentication deployments starting in Feb 2024. Domain owners who send bulk messages to Gmail addresses would be required to authenticate their emails with DMARC. Gmail's AI-powered integrated defenses already stop spam, phishing, and other forms of email fraud by 99.9%.



- Get Cyber Security Insurance
- Have a Security Risk Assessment
- Know your compliances and data risks – PII, HIPPA, PCI - ensure you are following them

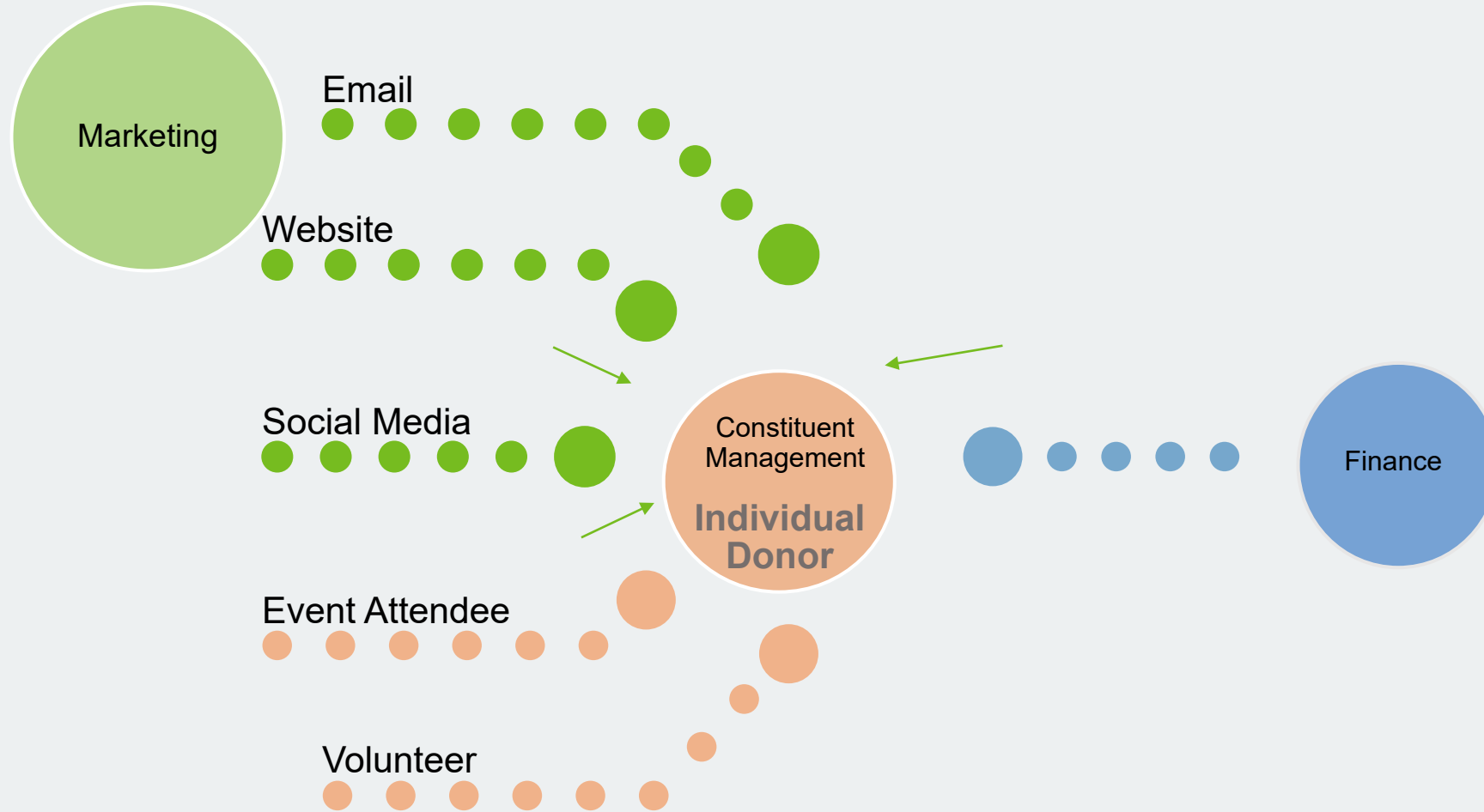
DATA AND STRATEGIC SYSTEMS

- Clients
- Donors
- Event Attendees
- Volunteers
- Members
- Finances
- HR



UNIFIED SYSTEMS & INTEGRATIONS

Example Integration





EVALUATE YOUR SYSTEMS

- Take inventory of each functional area and systems that support them.
- Are your systems capturing your program and service delivery?
- Can you analyze your data to understand the effectiveness of our work?
- Is staff able to pull the reports they need?
- Are there key integrations between systems?

SYSTEM CHECKLIST

Rate the effectiveness 0 = not working 10 = meeting our needs							
System	Name of Existing System(s)	What is it tracking?	What does it need do?	How well is it working?	Are we able to pull reports we need?	Does it integrate with other systems based on our needs?	Priority
CRM							
Membership							
Donor							
Online giving							
Volunteer							
Event							
HR							
Program specific 1 (case management, etc.)							
Financial management							
Travel expenses							
Mass email							
Project Management							

How well is it working?

Are we able to pull reports we need?

Does it integrate with other systems based on our needs?

*Rate the effectiveness
0 = not working | 10 = meeting our needs*

Lower Scores mean priority?

Download our Guide

A Consumers Guide to Case Management Systems

This long-awaited update of our popular guide returns to the case management software market to see how the systems have changed, how well they meet current needs, and how their features compare.

Even if you provide services to clients without standard case workflows, case management system can help you with client and program data tracking. See how the popular systems might help your organization deliver services—our guide is free to download thanks to the generosity of our sponsors.



First name*

Last name*

Email*

Organization Name

Organization Size by Budget

[TLC DOWNLOAD: A Consumers Guide to Case Management Systems 2022 \(techimpact.org\)](https://techimpact.org)

A Consumers Guide to Low-Cost Fundraising Software



- Foreword
- Introduction
- What Do These Systems Do?
- How to Select the System That's Right For You
- Comparison Charts
- System Profiles
- Appendices

» FOREWORD



At Tech Impact, we believe in bringing unbiased research about important technology issues to the nonprofit sector. If there were ever a specific category of software that was directly developed for nonprofit organizations, it is fundraising software. I am grateful to all of our sponsors and advertisers, who feel as passionate as we do about the importance of this report.

Fundraising is something nearly every organization faces, yet the options for software that enables this important function are significant. This research is meant to provide you with an easy-to-follow guide to many of the solutions on the market today and to help you align your organization's needs to the features and functions that you are most likely to use in your organization.

If you are considering your first fundraising software investment or looking to upgrade your software to keep up with the demands of your development team, I am hopeful

[Foreword - A Consumers Guide to Low-Cost Fundraising Software \(techimpact.org\)](https://guides.techimpact.org/donor-management-systems/)



CREATING AN ACTION PLAN

CREATE YOUR LIST OF PROJECTS

RATE YOUR INFRASTRUCTURE

Topic	Effective	Needs Work	Priority
We have clear staff oversight for IT.			
Workstations are under 5 years old and running Windows 10 with a minimum operating of 8GB of RAM or more.			
Workstations are kept up-to-date with basic security and policies.			

RATE YOUR PRODUCTIVITY AND COLLABORATION

Topic	Effective	Needs Work	Priority
Personal and shared documents, email and data systems are all with cloud products or otherwise automatically backed up off premise.			
We are using a unified system for email, calendar and file sharing.			
Our system supports collaboration and sharing, including easy remote access.			
Instant messaging platform in widely used.			

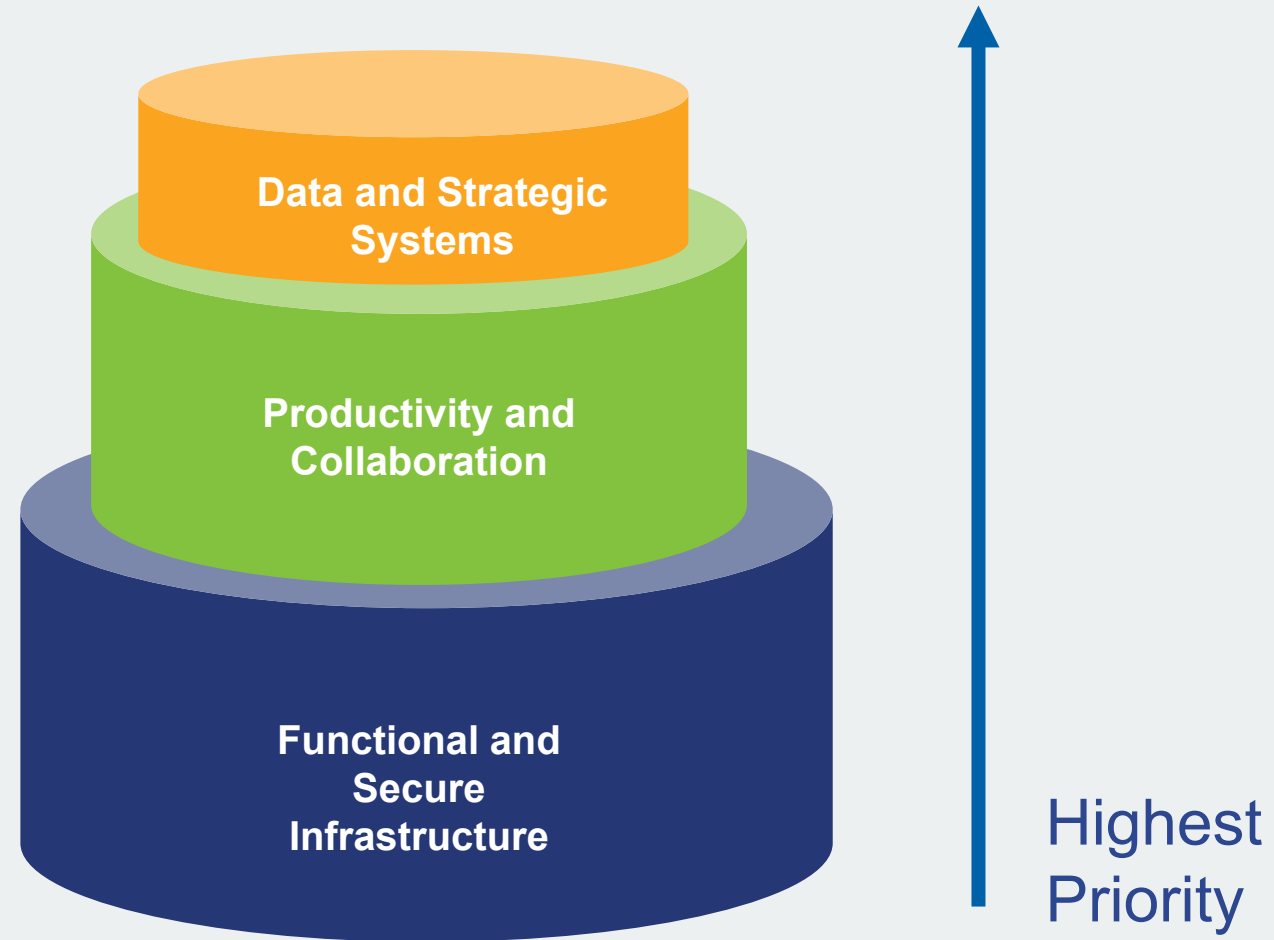
SYSTEM CHECKLIST

System	Name of Existing System(s)	What is it tracking?	What does it need do?	Rate the effectiveness 0 = not working / 10 = meeting our need			Priority
				How well is it working?	Are we able to pull reports we need?	Does it integrate with other systems based on our needs?	
CRM							
Membership							
Donor							
Online giving							

WHERE TO START



PRIORITIZE AT THE BASE



SCORE YOUR PROJECTS

Project	How much does it increase effectiveness?	How much does it reduce time?	Is it straight forward to implement	Is it expensive?	Can you do it in-house?	Total Score
	Rate from 0-10	Rate from 0-10	Rate from 0-5	Rate from 0-5	Rate from 0-5	
	0=Not at all 10=transformative	0=Not at all 10=transformative	0=Very difficult 5=Easy	0=Expensive 5=Free	0=No 5=Easily	
<i>i.e. Combine events data with main database</i>	6	4	2	1	3	16
<i>i.e. Integrate finance and HR systems</i>	9	6	3	3	0	21
<i>i.e. Purchase a new printer</i>	2	4	4	5	5	20

CREATE YOUR LIST OF PROJECTS

Project	Owner	Impacts	Timeline	Start Date	Dependent On	Outside Expertise Needed	Cost	Staff Time
<i>i.e. Replace 5 workstations</i>	IT Manager	Marketing Department	1-3 months	April 2020	n/a	n/a	\$4,000	20 hours
<i>i.e. Review Policies and Procedures Manual</i>	IT Manager and Chief Executive		1-3 months	May 2020	n/a	n/a	0	5 hours
<i>i.e. Migrate files to SharePoint</i>	IT Manager	All Staff	2 months	TBD	Funding	Yes	\$5,400	40 hours
<i>i.e. Purchase a new printer</i>	IT Manager	It Manager	1 month	Immediate	n/a	No	\$2,000	10 hours



**KEEP
CALM
AND
WHAT'S IN
IT FOR ME?**

KEEP COMMUNICATION OPEN

- Publicize your project plan – include the risks, timeline and expected pain points.
- Help get staff get ready to accept and adopt changes.
- Holds team accountable
- Makes it easier to ask for resources when deadline/purpose is known
- Stress the benefits so your staff will push through the pain.

slido



How are you feeling about your technology and security?

① Start presenting to display the poll results on this slide.



Tech Assessment Tools

[Expert Guided Assessment TechCheck \(techimpact.org\)](https://techimpact.org) \$450 – expert guided

[TechSoup Digital Assessment Tool for Nonprofit Organizations](#) Free – self guided

[Tech Accelerate | NTEN](#) – Free – self guided

LET'S ANSWER SOME QUESTIONS!





THANK YOU

Melanie Meyer melanie@techimpact.org

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