NONPROFIT SYSTEMS AUDIT CHECKLIST

Use this checklist to evaluate whether your current tools and systems are helping your nonprofit operate efficiently—or holding you back from growth.

1. Data & CRM Systems

- [ ] **Do you have a centralized system to manage donor, client, and volunteer records?**
- [ ] **Can your CRM generate useful reports for grants, board meetings, or campaigns?**
- [ ] **Are staff properly trained on how to use the system?**
- [ ] **Is the platform aligned with your budget and organizational size?**

2. Financial Systems

- [ ] **Are you using an accounting platform that allows for restricted fund tracking?**
- [ ] **Can you easily pull reports for audits, grant reporting, and budgeting?**
- [ ] **Are your books reconciled monthly and reviewed by leadership or your board?**
- [ ] **Does your system integrate with your donor or payroll platforms?**

3. Program Management Tools

- [ ] **Do you have a way to track program deliverables, participants, and impact?**
- [ ] **Are staff duplicating work in spreadsheets that could be automated?**
- [ ] **Is reporting to funders fast, accurate, and data-driven?**
- [ ] **Are all departments using consistent tools or is data siloed?**

4. Communication & Collaboration Tools

- [ ] **Are you still managing operations through email threads and text messages?**
- [ ] **Do you use a centralized tool for project tracking (like Asana, Trello, or Monday)?**

- [ ] **Can staff easily collaborate—especially if working remotely or hybrid?**
- [ ] **Do you have SOPs that clarify how communication tools should be used?**

5. Compliance & Document Management

- [ ] **Are policies, bylaws, and compliance files stored in a centralized, secure location?**
- [ ] **Can you access what you need quickly for audits, funders, or state/federal agencies?**
- [ ] **Are outdated versions of documents causing confusion or mistakes?**
- [ ] **Is there version control or access level tracking on important files?**

Reflection Questions

Which systems feel clunky, outdated, or cause staff frustration?

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Where are you wasting time doing tasks manually that could be automated?

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Which systems are underutilized or duplicated?

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