



Technology Stack Assessment

Is your technology helping your mission, or making the work harder?

Strategic Stack for Good

Where nonprofit mission meets modern infrastructure.

Nonprofits often accumulate technology one decision at a time. Eventually, the challenge is understanding how systems, data, processes, and people fit together. Use this assessment to identify what is working, where friction exists, and what deserves a closer look.

How to use this form: Complete it with a cross-functional group. Include formal systems and the unofficial stack: spreadsheets, shared drives, manual databases, forms, and tools staff rely on.

Part 1: Your technology inventory

System / Tool	Primary Purpose	Owner	Primary Users	Integrates With	Annual Cost	Decision



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Decision options: Keep / Improve / Review / Replace / Investigate

Part 2: Rate your stack

Score each statement: **1 = Strongly disagree** | **2 = Disagree** | **3 = Unsure or mixed** | **4 = Agree** | **5 = Strongly agree**

Mission and Strategy

Statement	Score
Our technology supports current strategic priorities.	1 2 3 4 5
We can explain why we have each major system.	1 2 3 4 5
Technology decisions include operational and mission considerations.	1 2 3 4 5

Section total: _____ / 15

Staff Experience

Statement	Score
Staff can complete common tasks without unnecessary workarounds.	1 2 3 4 5
Staff know where information should be entered and maintained.	1 2 3 4 5
Training and documentation are available for essential systems.	1 2 3 4 5

Section total: _____ / 15

Data and Reporting

Statement	Score
Leadership can access reliable information without extensive manual manipulation.	1 2 3 4 5
We have clear ownership of important organizational data.	1 2 3 4 5
The same information is not routinely entered into multiple systems.	1 2 3 4 5

Section total: _____ / 15

Integration

Statement	Score
Major systems exchange information effectively where necessary.	1 2 3 4 5
Staff do not routinely export, reformat, and re-enter the same data.	1 2 3 4 5
We know where critical integrations exist and who maintains them.	1 2 3 4 5

Section total: _____ / 15

Risk and Sustainability

Statement	Score
Access is removed promptly when staff leave.	1 2 3 4 5
Critical systems use appropriate security controls, including multi-factor authentication where available.	1 2 3 4 5
More than one person understands essential systems and processes.	1 2 3 4 5

Section total: _____ / 15

Cost and Value

Statement	Score
We understand total annual technology spending.	1 2 3 4 5
We regularly review licenses and subscriptions for duplication or low usage.	1 2 3 4 5
Our most expensive systems deliver value proportionate to cost.	1 2 3 4 5

Section total: _____ / 15

Your Stack Score

Total: _____ / 90

72-90: Strong foundation. Look for targeted opportunities to simplify and improve.

54-71: Generally functional, with areas worth investigating.

36-53: Meaningful friction exists. Prioritize areas causing the greatest mission or staff impact.

Below 36: Step back before purchasing something new. Understand the underlying problems first.

Use the score as a conversation starter, not a grade.

Your three biggest opportunities

1.

2.

3.

Before buying another tool, ask: Is the problem really the technology, or is it the process, data, ownership, training, capacity, or integration surrounding the technology?

Next step

Pick one area to investigate. Document the problem, who experiences it, its impact, and what a better outcome would look like.



About Strategic Stack for Good

Where nonprofit mission meets modern infrastructure. Strategic Stack for Good shares practical guidance and tools for nonprofit leaders navigating technology, operations, organizational change, and the decisions connecting them.

These resources are designed to help organizations ask better questions, create clarity, and make more thoughtful decisions.

When the questions get complicated

Some technology challenges can be solved with a good worksheet. Others benefit from another perspective. Stack for Good Advisory offers independent conversations for organizations working through technology strategy, system evaluation, integration questions, change readiness, and organizational priorities.

Learn more: stackforgood.blog

These resources provide general educational and planning guidance. They are not legal, financial, cybersecurity, privacy, or regulatory advice. Organizations should consult appropriately qualified professionals when decisions require specialized expertise.