Not for Profit IT Onboarding Checklist

For Organisations with 30+ Staff

Use this checklist to evaluate how well a prospective IT provider will onboard your organisation and manage risk, governance, and continuity from day one.

1. Governance & Accountability

- ☐ Does the provider clearly explain **what is included** in onboarding and **what is not**?
- ☐ Is onboarding delivered as a **defined project**, not an open-ended activity?
- ☐ Will you receive **written documentation** of scope, assumptions, and exclusions?
- ☐ Is there a named **project owner** accountable for onboarding delivery?
- ☐ Does the provider support **board or executive-level reporting** during or after onboarding?

Red flag: "We'll work it out as we go" or heavy reliance on verbal agreements.

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2. Risk & Security Management

- ☐ Does onboarding include an **initial risk and security assessment**?
- ☐ Are critical risks (e.g. MFA gaps, backups, access issues) identified early?
- ☐ Does the provider apply a **minimum-security baseline** as part of onboarding?
- ☐ Is there a process for documenting and tracking risks that sit **outside scope**?
- ☐ Will risks be clearly explained in **plain English**, not just technical terms?

Red flag: Security is "reviewed later" or bundled vaguely into support.

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3. Data Protection & Compliance

- ☐ Does the provider understand **NFP-specific data sensitivity** (clients, participants, donors)?
- ☐ Are access controls reviewed and tightened during onboarding?
- ☐ Is responsibility for **data ownership and privacy** clearly defined?
- ☐ Can the provider support compliance expectations relevant to your organisation (e.g. funding bodies, auditors)?
- ☐ Is there a clear process for handling incidents discovered during onboarding?

Red flag: No discussion of data governance during onboarding.

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4. Clarity of Scope & Change Control

- ☐ Is there a documented process for handling **out-of-scope discoveries**?
- ☐ Are additional systems, users, or devices treated as **scope changes**, not absorbed silently?
- ☐ Will any additional work require **explicit approval** before proceeding?
- ☐ Does the provider distinguish between:
  - ▪ onboarding
  - ▪ security uplift
  - ▪ future improvement projects?

Red flag: "We'll just fix it while we're in there."

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5. Documentation & Knowledge Transfer

- ☐ Will your systems, users, and environment be **fully documented** during onboarding?
- ☐ Will documentation be accessible to your organisation (not locked inside the provider)?
- ☐ Is there a clear handover from onboarding into ongoing support?
- ☐ Will undocumented legacy systems be clearly identified as risks or future work?

Red flag: Documentation is promised "later" or treated as optional.

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6. Business Continuity & Stability

- ☐ Does onboarding prioritise **stability before change**?
- ☐ Are backups, monitoring, and alerting verified early?
- ☐ Is there a plan to avoid disruption to staff and service delivery?
- ☐ Are high-risk changes avoided during critical operating periods?
- ☐ Does the provider acknowledge that **onboarding is a high-risk transition phase**?

Red flag: Immediate large-scale changes without assessment.

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7. Budget Awareness & Cost Transparency

- ☐ Is onboarding priced clearly and separately from ongoing support?
- ☐ Are you shown what costs are **fixed vs variable**?
- ☐ Does the provider avoid surprise invoices during onboarding?

☐ Are future improvements presented as **options**, not obligations?
☐ Is the provider comfortable working within funding or budget cycles?

Red flag: Costs are vague or bundled into "general support".

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8. Roadmap & Future Planning

☐ Does onboarding result in a **clear improvement roadmap**?
☐ Are risks, ageing systems, and non-standard items prioritised clearly?
☐ Can the roadmap be used for **board discussion or funding justification**?
☐ Is the focus on sustainability, not just technical perfection?
☐ Does the provider support ongoing review, not a one-off engagement?

Red flag: No plan beyond "support tickets".

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9. Communication & Culture Fit

☐ Does the provider communicate clearly with **non-technical stakeholders**?
☐ Are expectations set realistically, not oversold?
☐ Does the provider demonstrate experience working with Not-for-Profits?
☐ Are they comfortable being transparent about risk and limitations?
☐ Do they treat onboarding as the start of a partnership, not a transaction?

Red flag: Heavy jargon or dismissive responses to governance concerns.

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10. Final Decision Check

Before selecting an IT provider, ask:

☐ Can they clearly explain their onboarding process end-to-end?
☐ Do they separate **immediate stabilisation** from **future improvement**?
☐ Do they reduce risk during transition—or introduce it?
☐ Would you be comfortable explaining their onboarding approach to your board?

If the answer to any of these is **no**, pause and reassess.

How to Use This Checklist

▪ Score each provider honestly
▪ Look for **clarity, structure, and accountability**
▪ Prioritise risk management over speed
▪ Choose the provider that helps you make **informed decisions**, not rushed ones