



ENDPOINT SOLUTIONS

Technology Leadership Assessment — Delivery Report



Client: Harborlight Community Services

Date: June 10, 2026

Prepared by: Michael-Paul Hart, Endpoint Solutions

Confidential — prepared for Harborlight Community Services leadership. Not for distribution.

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OVERALL MATURITY

40**Developing**

Combined maturity across the assessed stages.

ENGAGEMENT

Industry: Nonprofit — Human & Community Services

Primary sponsor: Teresa Nkemdirim — Executive Director

Executive summary

Harborlight Community Services does meaningful work across three sites on a lean budget — and its technology reflects that: capable people making do with donated equipment, grant-funded point tools, and a lot of goodwill. The organization protects sensitive information about the families it serves and the donors who fund it, but there is no internal IT owner, no documented plan, and no security governance to match those responsibilities. Donor and client data lives largely in spreadsheets and email, and continuity has never been tested.

The sharpest exposures are the security of donor and client data (personal and, for donations, payment information) on an environment with inconsistent MFA and no policy, and continuity (case and donor records depend on backups no one has verified). The good news: as a nonprofit, Harborlight qualifies for heavily discounted and donated technology it is not yet using, so much of this can be fixed at low cost. This report gives the board and leadership a prioritized, plain-English plan.

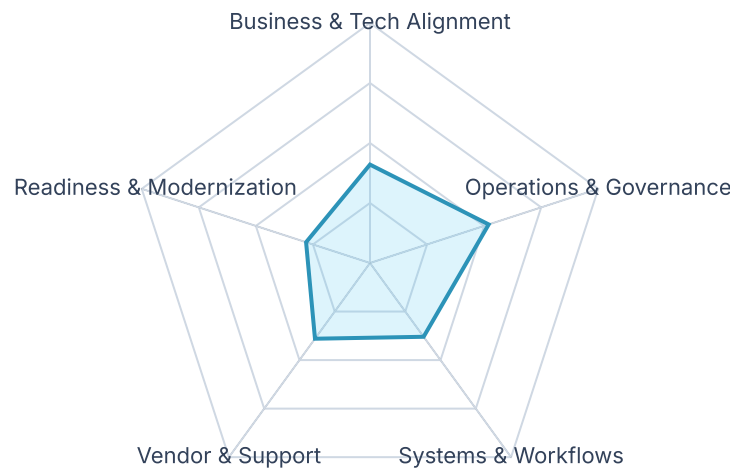
Current-state overview

Harborlight runs Microsoft 365 (via nonprofit licensing/grants) for email and files, a donor/CRM database, a case-management system for client services, and QuickBooks for finance, across three locations with a mix of donated and aging devices. A volunteer and a part-time contractor provide informal IT help; there is no managed provider and no internal owner. Donor and client information is frequently worked in spreadsheets and shared by email, MFA is inconsistent, and there is no written security or acceptable-use policy. Backups exist for some systems but have never been test-restored. The organization is not using much of the discounted and donated technology and security tooling available to nonprofits.

Maturity scorecard

STAGE		SCORE	INTERPRETATION
01	Business & Tech Alignment	41%	Developing
02	Operations & Governance	52%	Developing
03	Systems & Workflows	38%	Reactive
04	Vendor & Support	39%	Reactive
05	AI Readiness & Modernization	28%	Reactive

Maturity profile



Top findings & business implications

1. **Donor and client personal data lives largely in spreadsheets and email.** — Sensitive information about vulnerable clients and donors (including donation payment details) is scattered and hard to protect — a privacy and trust risk.
2. **No internal IT owner and no security or acceptable-use policy.** — Security and continuity depend on a volunteer and a contractor; the board has no visibility into technology risk it is responsible for governing.
3. **Backups exist for some systems but have never been test-restored.** — A ransomware event or failure could lose case and donor records with no proven recovery — disrupting services and funding.
4. **Multi-factor authentication is inconsistent across accounts holding sensitive data.** — Account compromise and phishing — common against nonprofits — are more likely, risking donor funds and client data.
5. **Discounted and donated nonprofit technology is largely unused.** — Harborlight is paying in risk and effort for gaps that available nonprofit programs could close at little or no cost.

Domain observations

01 • BUSINESS & TECH ALIGNMENT — 41%

Leadership is mission-focused and sees technology as overhead to minimize rather than a way to serve more people effectively. There is no technology plan tied to programs, grants, or growth, and decisions follow whatever a grant funds or a device fails.

02 • OPERATIONS & GOVERNANCE — 52%

Board-level reporting exists for finances and outcomes, which is a governance strength, but technology and data risk are not part of that oversight. There is no internal IT owner and no written policy. Given the sensitivity of client and donor data, bringing technology risk into board visibility is a priority.

03 • SYSTEMS & WORKFLOWS — 38%

Core systems (donor CRM, case management, QuickBooks, Microsoft 365) are in place but disconnected, so staff re-key data and lean on spreadsheets and email to bridge them. Microsoft 365 nonprofit features are underused. Continuity is unproven — backups have not been tested and there are no documented recovery targets.

04 • VENDOR & SUPPORT — 39%

Technology has accumulated through grants and donations with little central oversight. Support responsibilities across the volunteer, contractor, and software vendors are only partly clear, and there is no view of total spend or of the discounted/donated nonprofit programs the organization is eligible for.

05 • AI READINESS & MODERNIZATION — 28%

AI readiness is early and unmeasured, and given donor and client data the priority is a clear policy before any adoption. There are practical future opportunities — grant writing, reporting, donor communications — but the foundations (security, policy, organized data) must come first.

Risk register

RISK	AREA	SEVERITY	OWNER
Donor and client personal/payment data exposed in spreadsheets and email	Systems & Workflows	Critical	Executive Director
Untested backups of case and donor records — recovery unproven	Systems & Workflows	High	IT contractor + ED
Inconsistent MFA and no security policy on sensitive data	Operations & Governance	High	Operations Manager
Technology and data risk absent from board oversight	Operations & Governance	Medium	Board + ED
Possible sensitive data in unapproved AI/consumer tools, no policy	AI Readiness & Modernization	Medium	Executive Director

Recommended priorities

03 · SYSTEMS & WORKFLOWS

Get donor and client data out of spreadsheets and email, and prove backups

Move sensitive information into the CRM and case systems with proper access controls, and test-restore backups — protecting the people and funders Harborlight depends on.

02 · OPERATIONS & GOVERNANCE

Enforce MFA, adopt a data policy, and add technology to board oversight

Turn on multi-factor authentication, adopt a simple security and acceptable-use policy, and give the board a short technology-and-data-risk view.

04 · VENDOR & SUPPORT

Claim available nonprofit discounts, donations, and security tooling

Inventory vendors and spend, then adopt the discounted and donated Microsoft, security, and infrastructure programs Harborlight qualifies for as a nonprofit.

05 · AI READINESS & MODERNIZATION

Set a data-use policy before adopting AI

Publish a clear acceptable-use policy covering donor and client data so any future AI use for grants and communications is safe.

Technology leadership roadmap

0–30 days

ACTION	OWNER	PRIORITY	EFFORT
Enforce multi-factor authentication on all accounts Outcome: Reduced account-compromise and donor-fund risk · Vendor: Endpoint Solutions	IT contractor	High	Low
Adopt a simple data-protection and acceptable-use policy Outcome: A standard for protecting client and donor data · Vendor: Endpoint Solutions	Executive Director	High	Low
Test-restore case-management and donor-CRM backups Outcome: Proven recovery for mission-critical records · Vendor: Endpoint Solutions · Depends on: Backup access	IT contractor	High	Medium

31–90 days

ACTION	OWNER	PRIORITY	EFFORT
Move donor/client data out of spreadsheets into governed systems Outcome: Sensitive data protected and access-controlled · Vendor: CRM vendor	Operations Manager	High	High
Inventory vendors, spend, and eligible nonprofit programs Outcome: Visibility into cost plus low-cost improvement options · Vendor: Endpoint Solutions	Finance	Medium	Medium
Add a short technology-and-data-risk item to board reporting Outcome: Board oversight of the risk it governs	Executive Director	Medium	Low

91–180 days

ACTION	OWNER	PRIORITY	EFFORT
Adopt discounted/donated Microsoft 365 nonprofit and security tooling Outcome: Better protection at little or no cost · Vendor: Endpoint Solutions · Depends on: Vendor inventory	IT contractor	Medium	Medium
Run security-awareness and phishing training for staff and volunteers Outcome: Fewer successful scams targeting donations · Vendor: Endpoint Solutions	Operations Manager	Medium	Low

181–365 days

ACTION	OWNER	PRIORITY	EFFORT
Publish an AI acceptable-use policy for donor and client data Outcome: Safe path to AI help for grants and communications · Vendor: Endpoint Solutions	Executive Director	Medium	Low

ACTION	OWNER	PRIORITY	EFFORT
Pilot approved automation for grant reporting and donor communications Outcome: Staff time back for programs and services · Vendor: Endpoint Solutions · Depends on: AI policy in place	Operations Manager	Low	Medium

Vendor & support ecosystem

VENDOR	ROLE / COVERAGE	RENEWAL / NOTES
IT volunteer + part-time contractor	Informal help-desk & fixes (no managed agreement)	Ad-hoc
Microsoft 365 (Nonprofit)	Email, files, identity — grant/discounted licensing	Annual 03/2027
DonorBridge CRM	Donor management & online giving	11/2026
CaseTrack	Client case management & reporting	Grant-funded 09/2026
QuickBooks Online (Nonprofit)	Fund accounting & finance	Monthly
Regional Broadband	Internet across three sites	Unknown — contract not located

Documentation reviewed: Microsoft 365 licensing or admin summary · Software / application list · Device count / inventory · Employee count by role or location · Known projects, issues, or planned purchases

Evidence notes: No written security or data-protection policy exists — a priority finding given client and donor data. Backup documentation was not available and should be established. The organization's eligibility for nonprofit technology and security programs should be reviewed as a low-cost path to closing gaps.

Renewal & contract calendar

RENEWAL	VENDOR	ROLE / COVERAGE
Grant-funded 09/2026	CaseTrack	Client case management & reporting
11/2026	DonorBridge CRM	Donor management & online giving
Annual 03/2027	Microsoft 365 (Nonprofit)	Email, files, identity — grant/discounted licensing
Ad-hoc	IT volunteer + part-time contractor	Informal help-desk & fixes (no managed agreement)
Monthly	QuickBooks Online (Nonprofit)	Fund accounting & finance
Unknown — contract not located	Regional Broadband	Internet across three sites

Next steps

1. Review this report with leadership and confirm the priorities.
2. Assign owners and target dates to the roadmap actions.
3. Decide where ongoing technology advisory support is appropriate.

Appendix — discovery responses

01 · Business & Tech Alignment

Does technology clearly support your business strategy?	Somewhat
Leadership visibility into technology	Limited
Confidence making technology decisions	Some
Is there a technology plan tied to business goals?	None

02 · Operations & Governance

Is ownership of systems and risks clear?	Partly
Is IT reactive or governed?	Mostly reactive
How are tech decisions made?	Informal
Leadership gets regular technology reporting?	Sometimes

03 · Systems & Workflows

How much do tools or workflows slow people down?	Somewhat
Are core systems integrated?	Siloed
Microsoft 365 used to its potential?	Basics only
Confidence in continuity if a key system fails	Low

04 · Vendor & Support

Is it clear who covers what for support?	Partly
Visibility into total technology spend	None
Are vendors aligned to business needs?	Somewhat
Awareness of upcoming contracts or renewals	Vague

05 · AI Readiness & Modernization

Are employees using AI tools today?	Unknown
AI acceptable-use policy?	None
Identified automation opportunities?	A few ideas
Is your data ready to support AI?	Not ready

How scoring works

Each answer maps to a 0–100 maturity value based on what it signals. Stage scores are the average of the answered, scored questions in that stage; the overall score is the average of assessed stages. Some questions are informational context and are not scored. Bands: Strategic 80+ · Governed 60+ · Developing 40+ · Reactive 20+ · Ad-hoc 0+.

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