Nonprofit Digital Assessment Worksheet

This tool is designed to assess your organization's use of technology and approach to important topics like privacy and security. This assessment can help you identify weaknesses and opportunities in your digital strategy. It covers four key solution areas:

Engage Donors and Volunteers
Donors and volunteers are at the center of your organization. Are you utilizing data and technology to connect with them in the right way at the right time?

Empower your Employees
Your employees are passionate about your organization's mission. Are you providing tools that help unlock productivity so they can focus on the work that they care most about?

Optimize Operations
Processes and operations are the backbone of your organization. Are you leveraging the cloud? Are your operations scalable, flexible and efficient?

Innovate for Impact
You are developing solutions to the world's most challenging issues. Are you building a culture of empowerment and innovation to accelerate your mission?

As you work through this assessment, you'll have the opportunity to determine your maturity score for each of the four key areas. The average score for each area will highlight where your most pressing needs are and help you prioritize going forward.

Engage Donors and Volunteers

Enabler Maturity Levels				Current Level
1 - Lagging	**2 – Adapting**	**3 – Mature**	**4 - Best practice**	
Improve speed, quality and transparency of program impact				
Clear Key Performance Indicators (KPIs) ❑ No 12 to 18 month goals and no defined, published KPIs.	❑ Short-term goals and metrics defined but no clear KPIs that measure impact of programs.	❑ Clearly defined goals and KPIs.	❑ Organization has clear goals with KPIs and understanding of (and ability to communicate) impact.	
Data collection ❑ Little or no data collection. ❑ Data collection done manually, via paper or other non-tech methods. ❑ Can't easy share or analyze data that is collected.	❑ Disparate digital collection methods that cannot be integrated or analyzed.	❑ Unable to fully or accurately measure results against KPIs - missing data or hard to get. ❑ Measuring KPI activity rather than impact. ❑ Most data stored in the cloud in an easily accessible format.	❑ Data collection processes and tools are built into every part of the organization. ❑ Collection is done via mobile devices, leveraging the cloud. ❑ Little to no overlapping or missing data.	
Data visualization ❑ Not currently creating data visualizations.	❑ Producing some graphs and charts in Excel. ❑ Storing data in the cloud. ❑ Beginning to explore data visualization software.	❑ Creating and using basic data visualization dashboards. ❑ Sharing limited amounts of data with certain stakeholders.	❑ Data published via multiple channels that clearly show results and impact over time. ❑ Access to data is self-service, with appropriate levels of role-based access.	
			AVERAGE SCORE	/3
Treat and engage donors like you know them				
Stakeholder tracking and management ❑ Mostly ad hoc, engagement data collection - paper or Excel in siloed repositories. ❑ Unable to leverage collected data to inform or engage target audiences.	❑ Basic server or cloud system for collecting and tracking engagement with donors, volunteers and more. ❑ Use of data limited to outreach purposes on a manual level. ❑ No data insights applied to inform target audience.	❑ Solid, cloud-based CRM system that allows for tracking constituents across engagements. ❑ Actively driving campaigns out of the CRM system. ❑ Some data analysis and visualization used to drive understanding.	❑ CRM system is at the core of the organization's operations and provides real engagement and understanding. ❑ Robust, clear reporting and forecasting, easily consumed in visualizations.	
Real-time donor analytics ❑ Analytics performed on an ad hoc basis and uses only historical data (e.g. data that is more than 2 months old).	❑ Analytics performed with significant time lag (>4 weeks) and through a process such as loading from the data warehouse into the analytics engine.	❑ Real-time analytics are used and guide <50% of decisions. ❑ Analytics are not fully integrated into transactional systems.	❑ Real-time analytics are used and guide >75% of important decisions. ❑ Analytics are embedded in transactional systems and available to users at critical decision points.	
Segmentation ❑ Limited donor segmentation and targeting.	❑ Use of a single simple criterion (e.g. annual giving) to split donors into large groups/tiers (e.g. Silver, Gold, Platinum).	❑ Donors segmented into smaller groups based on criteria that incorporates donor behaviors or needs. ❑ Segmentation used to shape program offerings and marketing strategy.	❑ Multidimensional donor segmentation leading to smaller micro-segments (e.g. criteria that combines donor value, behavior, demographics, etc.). ❑ Multidimensional segmentation used to shape program offerings and marketing strategy.	
Social media/marketing integration ❑ Limited to no integration with social media.	❑ Social media content is occasionally monitored and is linked to all marketing campaigns. ❑ Social media is never at the core of the initiative.	❑ Social media presence is constantly monitored and is linked to all marketing campaigns. ❑ Campaigns and ideas around social media are leveraged in an ad hoc manner.	❑ Social media presence is proactively monitored and is linked to all marketing campaigns. ❑ Campaigns and ideas with social media engagement at their core are regularly executed to stimulate sharing and advocacy.	
Mobile optimized sites ❑ No provision for donors to use their mobile phones or tablets.	❑ Donors can access a subset of the functionality (e.g. browse products and services) on their devices.	❑ N/A	❑ Mobile optimized sites provide end-to-end functionality (e.g. to browse, select, donate, provide feedback) on a wide variety of mobile platforms. ❑ Mobile experience integrated with other channels and optimized to provide a consistent experience.	
Dynamic promotions ❑ All promotions are done only at the campaign level without donor specificity.	❑ Ability to generate promotions at a donor segment level.	❑ Ability to generate promotions at an individual donor level.	❑ Promotions generated in real-time based on donor data analysis and programming needs.	
			AVERAGE SCORE	/6
Optimize volunteer experience				
Volunteer management ❑ No policies in place.	❑ No centralized process for recruiting - implemented on a project by project or location basis, or on an Excel sheet.	❑ Guidelines and process for recruiting but no ongoing relationship management plan in place.	❑ Clear organization guidelines for which volunteers to engage for specific tasks/activities and when, as well as the ability to make assignments via mobile tools.	
Skills and needs matching ❑ Volunteers are matched on a first-come first-served basis to teams that have openings.	❑ Volunteers are assigned to teams based on their skills and preferences.	❑ Volunteers are matched to teams based on their skills, goals and team needs.	❑ Predictive analytics are used to identify the best candidates for teams based on a holistic set of required skills and the working dynamics among team members.	
Volunteer communications ❑ No plan or process for regularly communicating with volunteers.	❑ Project-based communications using emails.	❑ Project-based communications using an omnichannel approach.	❑ Dynamic and trigger-based communications in an omnichannel format.	
			AVERAGE SCORE	/3

Engage Donors and Volunteers

Enabler Maturity Levels				Current Level
1 - Lagging	2 – Adapting	3 – Mature	4 - Best practice	
Streamline grant management process				
Responding ❑ No established grant pursuit process.	❑ Grant pursuit process in place but on a first in/first out basis.	❑ Documented grant pursuit process with a manual evaluation of prioritization.	❑ Dynamic grant pursuit process with a data-informed process that guides prioritization while removing cumbersome approval processes.	
Reporting ❑ Basic reports, manually generated on an ad hoc basis.	❑ Some visual insights, aligned to governing body data frameworks (where applicable) and manually generated.	❑ Automated reports within appropriate data frameworks and centrally accessible. ❑ Understanding of impact of dollars spent.	❑ Cloud-based reporting and automated generation of reports with explicit visualization of dollars spent and consequent impact.	
Prioritization ❑ No defined, specific priorities or tools.	❑ Identified priorities and barriers with current process, but no tools to address them.	❑ Established priorities with some use and adoption of technology to facilitate grant submission process.	❑ Well-defined priorities in place, supported by training and tools to facilitate a streamlined grant submission process.	
			AVERAGE SCORE	**/3**

Empower your Employees

Enabler Maturity Levels				Current Level
1 - Lagging	2 - Adapting	3 - Mature	4 - Best practice	
Drive communication and collaboration to accelerate decision making, creativity and productivity				
Communications tools ❑ No communications tools in place beyond basic telephone and email capabilities.	❑ Leveraging internet-based technology for some calls and chat, mostly driven by personal preference and accounts.	❑ Organization-wide cloud-based telephone and communications systems in place but not consistently used.	❑ Organization-wide cloud-based telephone and communications systems in place, including instant messenger, web conferencing, and VOIP solutions, and consistently used.	
Coordination tools ❑ No shared calendars or real-time availability information. ❑ Organization relies on face-to-face meetings, telephone calls and top-down communication.	❑ Some use of telepresence and shared calendars but no policy or tool standards in place.	❑ Real time availability/presence information and team calendars in place but low usage due to lack of policies and/or buy-in.	❑ Real time availability/presence, shared calendars, intelligent tools to automatically find available time with internal and external parties, with organizational buy-in.	
Language tools ❑ No tools in place to aid in communication across languages.	❑ Internal resource for multi-language communications performed on an "as needed" basis.	❑ Language tool policies in place and leveraging vendors in place of tools.	❑ Organizational policies in place on how and when to use a variety of built-in, automated language tools to better communicate within and outside the organization.	
Collaboration tools ❑ No centralized repository for sharing and collaborating on work.	❑ Leveraging some organizational and/or personal cloud-based solutions to store and share organization work.	❑ Organization-wide intranet and/or document-sharing solution that allows for employees to store and share information. ❑ Mainly accessible via organization's internal network, but can provide access outside with authentication.	❑ Employees can store, share and access their work documents on any device, anywhere. ❑ All data and content can move from employee to employee regardless of device or platform. ❑ Real-time co-authoring of documents.	
			AVERAGE SCORE	**/4**
Empower a mobile network of employees and volunteers				
Security of devices, data and assets ❑ Employees have access to data only within their organization's campus(es) with no ability for remote access.	❑ Employees have ability to remotely access the organization's network from their single approved device through VPN. ❑ Employee devices are managed by a central IT team.	❑ Employees have ability to remotely access the organization's network from any approved device through VPN.	❑ Company supports "bring your own device" (BYOD) programs, providing secure access to the organization's data from any device. ❑ Remote configuration and monitoring tools help ensure security and privacy of data.	
Mobile-optimized technology ❑ Applications are not responsive and are dependent upon connectivity.	❑ Responsive applications and pages for data collection but require high-bandwidth connectivity.	❑ N/A	❑ Staff applications, including data collection and survey tools, are mobile responsive and operate in a low-bandwidth environment.	
			AVERAGE SCORE	**/2**

Optimize Operations

| Enabler Maturity Levels | | | | Current Level |
1 - Lagging	2 - Adapting	3 - Mature	4 - Best practice	
Clear roadmap to cloud adoption				
Technology strategy	❑ No organization-wide technology strategy, mostly ad hoc.	❑ Limited strategy focused on a specific function (i.e. call center) or location (headquarters vs. field). ❑ Focus is on improvements and efficiencies.	❑ Solid organization-wide technology strategy that maps out 2-5+ years. ❑ Includes effective use of cloud technology. ❑ Starting to focus on continued improvement, innovation and use of technology to push organization forward.	❑ Robust multi-year technology strategy with organization-wide buy in and support. ❑ Clear roadmap for how technology scales and helps increase impact of operations and programs/services. ❑ Embracing cloud-based IT. ❑ Using technology to disrupt sector and programming approaches.	
Accounting of existing IT	❑ No full accounting of existing IT infrastructure or costs.	❑ Some accounting of IT infrastructure and costs. ❑ No clear visibility into personal devices and/or field offices.	❑ Centrally located, accessible accounting of existing IT hardware, platforms and costs.	❑ Actively managing IT infrastructure, moving majority of platform and solutions to the cloud. ❑ Actively monitoring IT total cost of ownership.	
			AVERAGE SCORE	**/2**
Scalable, reliable infrastructure				
Digitized organizational operations	❑ Limited to no use of technology for organizational operations (e.g. warehousing, human resources, finance).	❑ Some use of technology to automate simple organizational operations (e.g. document management and donor giving history).	❑ Broad use of technology to digitize the organizational operations (e.g. digitization of formerly paper-heavy routines). ❑ Multiple solutions from different vendors with limited integration across systems.	❑ Fully digitized and integrated solutions with automated workflows and data driven insights of organizational operations (e.g. supply chain, financial operations, donations, budgeting). ❑ Manual intervention required only in special circumstances.	
Connectivity	❑ All work is done in an offline mode and collaboration/sharing are done asynchronously via manual processes.	❑ Some work is done online and some offline but no tools and processes in place for seamlessly synching data and collaborating.	❑ Work is done online with tools in place but no policies to ensure optimized data sharing and collaboration.	❑ Work is done with the ability to connect and sync to the cloud via multiple devices so data sharing and collaboration are optimized.	
			AVERAGE SCORE	**/2**
Defined and repeatable processes				
Data and privacy policies	❑ No known data and privacy policies in place.	❑ Some data and privacy policies in place, mostly per program, and often ad hoc. ❑ Limited standardization across locations or departments.	❑ Organization-wide data and privacy policies in place. ❑ Some adherence to basic best practices and industry standards.	❑ Organization has clearly defined, understood and practiced data and privacy policies. ❑ Regular training and audits to ensure compliance and understanding.	
			AVERAGE SCORE	**/1**
Ensure compliance and security with secured platform				
Access management and security	❑ Employees must access each individual service and platform separately, with distinct profiles that do not share information.	❑ Employees can securely share sign-on information for several commonly-used services. ❑ Overall employee profile (e.g. applications and local copies of files) not consistent across devices.	❑ Employees have a single consistent stored profile available across multiple devices. ❑ Apps not consistent across devices.	❑ Employees use secure single sign-on (SSO) technology to share a unified login and profile with all apps and platforms. ❑ Advanced access management allows easy management of privileges (e.g. integrated data protection to segment personal and official data on the same device).	
Data protection	❑ No persistent protection or process in place.	❑ Location specific data protection tools and process in place.	❑ N/A	❑ Defined usage rights for persistent data protection regardless of where data is stored or shared. ❑ Encryption applied to sensitive data (e.g. beneficiary data).	
			AVERAGE SCORE	**/2**

Innovate for Impact

Enabler Maturity Levels				Current Level
1 - Lagging	2 - Adapting	3 - Mature	4 - Best practice	
Enable the collection, normalization and sharing of data				
Dynamic BI ❑ Employees leverage data to manually generate insights and guide decision making.	❑ Employees have access to dashboards and reports generated from data that is not real-time. ❑ Only power users can run analyses beyond the auto-generated dashboards and reports.	❑ Employees have access to dashboards and reports generated from real-time data.	❑ Employees have access to dashboards and reports generated from real-time data and run analyses on data relevant to their function to aid decision-making.	
Knowledge management ❑ No standards or policies for archiving and sharing knowledge.	❑ No standards or policies but employees are encouraged to document and share knowledge. ❑ Some use of digital tools to capture knowledge and access records (e.g. documents hosted and available on a web portal).	❑ Standards or policies are in place with extensive use of digital tools to capture and share knowledge (e.g. online discussion forums, tools for co-creation of documents).	❑ Standards or policies use bots equipped with learning algorithms are used to answer knowledge requests based on natural language search. ❑ Relevant content is automatically selected and pushed to employees during role transitions.	
Information sharing hub ❑ Employees use traditional methods (e.g. emails, USB drive) to share information with each other.	❑ Employees use some sharing and archiving of information in an organization wide repository, but on an ad hoc basis.	❑ Employees use extensive digital tools (e.g. online forums, internal social media posts) to share information within the organizational network; no provision for secure cross-device access.	❑ Employees use information-sharing tools that are connected to each other as part of an integrated information sharing "system" (vs. a proliferation of disparate information sharing tools).	
			AVERAGE SCORE	/3
Improve agility of operations, fundraising and programming				
Program innovation ❑ No processes or reviews in place to assess program strategy or impact.	❑ Processes (e.g. reviews) in place to regularly examine and map sources of value to programs.	❑ Processes in place to explore program portfolio additions and changes well beyond just beneficiary needs and span the entire value chain (e.g. smart collaboration with external partners).	❑ As a part of the process, employees, volunteers and leaders are encouraged to research and propose new programmatic areas based on insights and data.	
Rapid test and learn methodology ❑ No use of digital tools or testing methodologies in place. ❑ Traditional approach to program development.	❑ Some use of digital tools and testing methodologies to build fast and test early (e.g. pilot programs).	❑ Extensive use of digital tools and testing methodologies by internal teams to test often and refine programs. ❑ Some agile methodologies are adopted.	❑ Extensive use of digital tools such as co-creation labs, online beta programs, etc. to test often and engage donors early on. ❑ Agile methodologies are prevalent across organization's culture.	
Business model innovation ❑ No processes or tools in place to regularly revisit and reevaluate organizational processes.	❑ Some processes in place to periodically examine emerging needs of donors and identify potential changes to programming.	❑ N/A	❑ Processes in place to explore program model changes well beyond just donor needs and span the entire value chain (e.g. smart collaboration with external partners and suppliers).	
Virtual agents ❑ No use of virtual agents to provide interactive donor support.	❑ Virtual agents programmed for standard flows and used for trivial support issues.	❑ Virtual agents programmed for standard flows and used to handle the majority of routine support issues.	❑ Virtual agents capable of using natural language processing and artificial intelligence algorithms to process majority of routine as well as complex donor support queries. ❑ Support systems learn from donor responses to improve the overall support experience.	
			AVERAGE SCORE	/4

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