Assessing nonprofit digital capacity:

A guide to digital assessment tools from across the world and how they compare

January 2022

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Introduction

This report provides an overview of the digital assessment tools available to nonprofits across the world. It outlines how they typically work, what they assess, their similarities and differences. It also showcases 20 different tools with individual profiles detailing who created them, how they work and when to use them.

TechSoup launched a *Digital Assessment Tool* in 2021, designed to help nonprofits identify where their technological capability can be improved. One of our main objectives was to create a free resource that nonprofits can use to get them started on the path of digital transformation.

Our tool was created in collaboration with leading technology experts and civil society partners from around the world. During this process we discovered a range of nonprofit digital assessments created by capacity building organizations across the world and by other TechSoup Global Network partners. Now that our tool has launched, we set out to better understand the landscape of digital transformation support for nonprofits across the world and how our collective work compares.

We partnered with Nissa Ramsay of *Think Social Tech* to undertake further research and write this report. We combined our knowledge and reached out to TechSoup Global Network partners and capacity building organizations, in order to curate a sample of 20 online digital assessment tools available to nonprofits in various countries. We hope that publishing and disseminating this report helps to surface further tools that are available, including in other languages.

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This report is based on an in-depth content analysis and testing of the tools, building on previous work comparing *digital transformation frameworks in the UK*. It outlines:

- Where we discovered tools, growing support and language differences internationally
- How digital assessment tools typically work
- Distinctions between digital assessment tools
- The 11 areas of digital transformation typically covered and their definitions
- How each area is covered by the tools, different approaches to asking questions, common indicators of success, critical reflections and gaps in coverage
- Key opportunities and areas for development across the tools available

The second section of the report showcases each of the 20 digital assessment tools included in our sample. Each individual profile showcases what the tool looks like, how it works, who created it, what it covers and what makes it unique.

There are growing numbers of digital assessment tools and burgeoning initiatives across the world intending to support nonprofits with digital capacity in the wake of COVID-19. As such, we hope this report acts as a useful reference and critical reflection point for those designing, supporting, implementing or funding these tools. We also hope it acts as a launchpad for further initiatives to improve support for nonprofit digital capacity.

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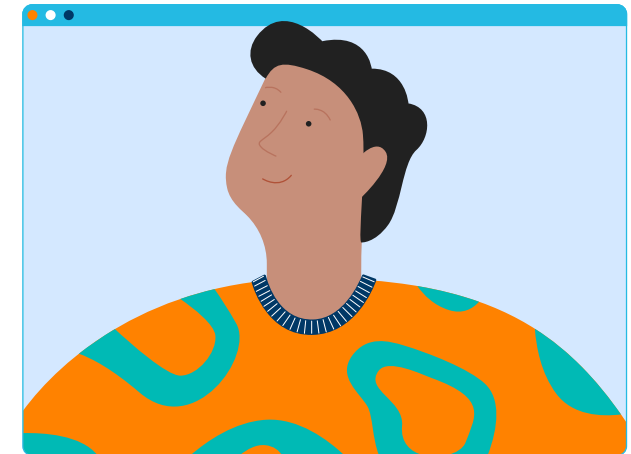
Research approach

This project set out to identify and compare online digital assessment tools that are designed for or used by nonprofit organizations in different countries. The research took place between September and December 2021 and has been documented on this *publicly accessible Google sheet* as a research archive, so that future projects can build on the findings and approach.

Identifying digital assessment tools

The first phase of research created an extensive list of assessments, pooling existing knowledge between TechSoup and Think Social Tech. We reached out to TechSoup Global Network partners and capacity building organizations to identify further tools. We added to this via online searches in English, French, and Spanish, reviewing websites from TechSoup Global Network partners, funders and capacity building organizations for links to tools. To counteract search engine bias, we also identified country or region reports and conferences focusing on digital transformation or nonprofit capacity. These provided insights into the current state of play and any distinct terminology to apply in further searching.

This produced a list of 40 reports and 79 digital assessment tools, totalling 119 resources for digital transformation. At this stage, tools and reports were only discounted if they were clearly irrelevant to nonprofits. However, we wanted to focus on tools that are:

- Developed for, relevant to or clearly used by nonprofit organizations
- Delivered online
- Intended for self-assessment
- Free/freemium
- Currently supported/updated

We limited our scope to tools that focused on nonprofits, although some are also relevant to businesses and other audiences (such as *University of Aarhus*, *Arrk* and *Uniformation*). Of the 79 digital assessment tools, 20 (one quarter) were selected for further in-depth content analysis where they met at least 4 of the criteria above. Of the 59 excluded, 17 were corporate tools and/or aimed at businesses, 9 were paper or spreadsheet based, 8 focused on a specific sector or a specialized digital skill, 6 were principles (not a self-assessment), 5 assessed individual skills, 5 were no longer maintained and 5 were still in production. There is clearly valuable information to learn from these assessments and insights from examining these have been noted in the report where relevant.

Content analysis process

We tested each tool, explored the website and reviewed associated blogs, reports or webinars about the tool. We documented the questions for each tool in English. In order to compare them systematically, each question was classified under one of 19 areas of digital transformation (connected to previous *UK based research*). This process highlighted significant overlap between some of the areas, which we subsequently merged. We then compared the questions asked under each area, identifying common indicators, the extent of coverage by different tools, any differences, and key gaps for development. *Section 1.4* gives further insights from the analysis process and outlines the resulting 11 areas of digital transformation used for the content analysis.

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Section 1

An overview of digital assessment tools
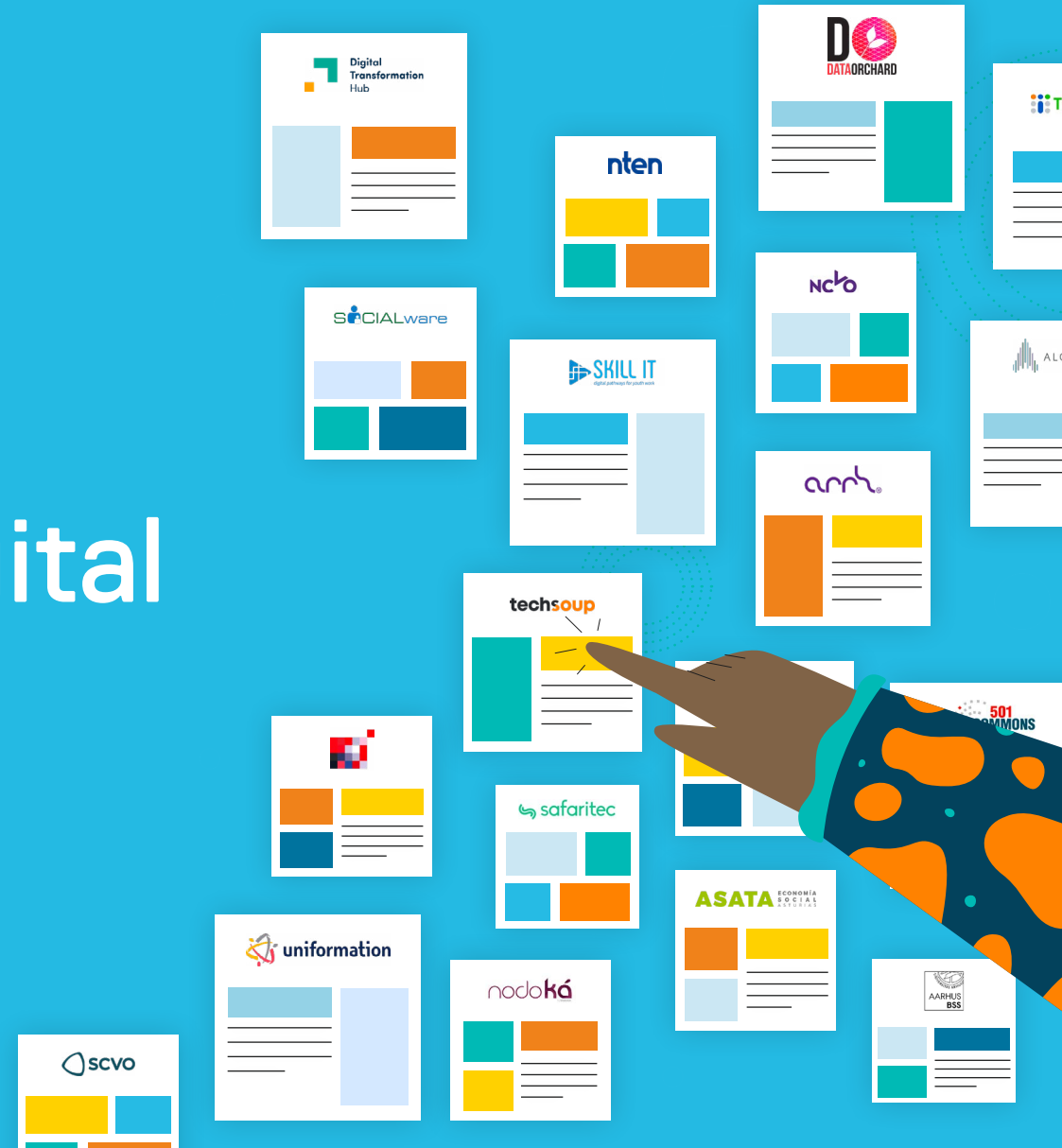
1.1 An international snapshot of tools, support, and terminology

The intention of this study was to find and compare a range of self-assessment tools aimed at nonprofits internationally. We were also interested to see differences between each country and the tools which were developed there. We asked ourselves:

- Which countries have more or different tools?

- Were there wider ecosystems for nonprofit support connected to digital transformation such as universities, infrastructure organizations or governments?

- Is 'digital transformation' commonly used as a reference point? How does the language differ?

This section highlights some of the key insights emerging from the process of searching for digital assessment tools. It is not intended to be a comprehensive global analysis of digital transformation support and capacity building, but it does give an idea of what exists internationally at this point in time.

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Tools uncovered in each country

Overall, the findings suggest that the USA and the UK have the most widespread offer of digital assessment tools, with varied or limited coverage elsewhere.

A summary of where digital assessment tools were found is shown in Table 1, although it is worth noting that many further tools were discounted and not counted here (for example, tools focusing on digital transformation in a different context or industry, such as higher education institutions).

The research team were based in the UK and the USA nonprofit sectors, which may have skewed the search results. However, searches in English, French and Spanish did uncover other tools and reports. In countries with very few tools, we did identify reports by international development agencies (such as the OECD), global consultancy corporations (such as Deloitte) and technology companies (such as Salesforce and Microsoft). Very few were led by the local sector bodies or infrastructure organizations and we discovered limited sector specific digital support. Future research should look to connect directly with local stakeholders and nonprofits to give an accurate local picture.

Table 1: The digital assessment tools uncovered in each country

Region	Number of tools in sample	Number of additional tools found
North America	6	24
USA	6	21
Canada	0	3
Europe	11	24
UK	5	9
France	2	3
Spain	1	5
Denmark	1	0
Ireland	1	0
Germany	0	2
Belgium	1	1
Europe-wide	0	4
Central and South America	2	1
Colombia	1	0
Argentina	1	0
Africa and the middle east	0	2
Nigeria	0	1
Africa wide	0	1
Asia Pacific	1	5
Australia	1	2
Hong Kong	0	1
Singapore	0	2
Global	0	3
Total	20	59

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Growing support for digital transformation capacity

Outside of the UK and the USA, we discovered some indications of emerging support for digital capacity building designed for and by nonprofits in the following regions:

Australia and New Zealand

Only one tool, the *digital capability quiz* was uncovered and featured in this report from Australia and NewZealand. This was created by the Infoxchange group, which combines support from *Infoexchange*, *Connecting Up* and *TechSoup in New Zealand*, as part of their recently launched *Digital Transformation Hub*. Their *2020 report* provides an overview of the need for digital transformation in the nonprofit sector. There is also significant effort to support digital inclusion, including the work of the *Good Things Foundation Australia*.

Canada

Whilst no digital assessment tools were uncovered in Canada, there looks to be increasing support for nonprofit digital capacity. *CanadaHelps* is a technology organization and charitable foundation working to increase access to technology for Canadian charities of all sizes. They recently launched their *2021 digital skills report*, based on a survey of 1400 charities and discovered that 60% of small charities have no plans to digitally transform. The *CIO Strategy council* also provides a forum for Canada's most forward-thinking Chief Information Officers and Executive Technology Leaders to focus on collectively transforming, shaping, and influencing the Canadian information and technology ecosystem. Consultancies such as *Now IT matters* also offer digital capacity assessments to nonprofits. The *Center for Social Innovation (CSI)* and *TechSoup Canada* also support charities, nonprofits and libraries with the effective use of technology.

Europe

Whilst many tools were uncovered in the UK, there are far fewer across Europe. However, there are more in development. In 2021, the Euclid network launched *EU3Digital*, a new Erasmus+ funded project with consortium partners across Europe. Over the next few years, EU3Digital will develop learning resources for social enterprises to develop individuals' and organisations' digital competences, advance their digital strategies, help them to engage with existing digital support and software, and thereby build capacity. The work includes a European Framework of Digital Competencies for Social Enterprises, developed by the Open University. It will also develop and launch a new 'Emergency Toolkit' for social enterprises focussing on cybersecurity, project management to marketing and outreach. The *TechSoup Europe Network* also serves a community of over 575 000 civil society organisations in the region with technology products, knowledge, and services. A *survey* on technology challenges and support needs was undertaken in 2020.

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1.1   International snapshot

Africa

No tools were featured in this report and few were uncovered, except for the *Alidade* platform by Engine Room to support nonprofits to choose technology and the *Nonprofit Self Assessment Tools (NOPSAT)* by the *Nigeria Network of NGOs (NNNGOs)* which has no focus on technology. There is however clearly growing interest in the field. The *ICT4D conference* in 2022 (previously in 2019) and *EITI Digital Transformation Virtual Conference for SMEs and Nonprofits* in 2021 both cover and support digital capabilities of nonprofits. WACSI has also started exploring the role of digital transformation of nonprofits in this *2021 report*. *TechSoup Africa* also supports nonprofits in 56 African countries and territories to use technology for social change. Google is also supporting digital transformation in Africa, with support available for nonprofits over the coming years (*read more here*).

South East Asia

No tools from South East Asia were featured in this report. We did locate an *organisational capacity assessment tool* with a focus on innovation (but not technology or digital transformation more broadly) by the *Hong Kong Council of Social Service*, a leading and sustainable professional development platform for the social service sector. Furthermore, *TechSoup Asia-Pacific* supports close to 50,000 nonprofits and charities in 43 Asia-Pacific countries with transformative technology products, knowledge, and services. However, activity beyond this is limited. A *2021 report by INTRAC* for the Ford Foundation states that there are very few resource organisations that exist with the exclusive mandate to offer institutional strengthening support to nonprofits. They also found that nonprofits and resource organisations have limited support (from funders and others) for digital preparedness and cybersecurity.

Central and South America

Two tools were featured in this report from *Safaritec* (by Wingu) and *Nodo Ká*. Other *TechSoup Americas* members also support nonprofits with technology, skills and digital transformation in the region, such as *CDI Chile*, *MAKAIA* in Columbia and *Wingu* also support digital transformation efforts. TechSoup Global also operates through these partners in Brazil, Chile, Columbia and Mexico. The *THNK Foundation* launched in 2020 in Brazil and is offering *leadership courses* to include digital transformation. In Chilie, *Dell Technologies* are partnering with 1000 nonprofits by 2030 to help them digitally transform.

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The language surrounding digital transformation assessments

There is varied language in how the following terms are used in various countries and languages. Visual xx shows the working definitions for key terms used in this report and noted the alternatives we regularly came across in the research (translations not included here).

Overall, we found that 'digital' and 'technology' are accepted umbrella terms and occur most frequently. In fact, the two are often used synonymously and interchangeably. However, some tools focus on technology explicitly and purposefully, because they assess that area of digital transformation (or define digital transformation as the adoption of technology. Others interpret technology in terms of online communications.

We noted that digital transformation and digital skills were most frequently written about in articles and reports with the clear inference that digital is a lag area for nonprofits everywhere and area for concern, intervention, research and support.

We also observed the following differences:

- Digital maturity is a common term in European tools, but is rare in US tools which focus on digital transformation.

- The tools themselves are widely referred to as assessments or diagnostic, but 'test' and 'tool' were more common used in French and Spanish-speaking countries

- Some tools refer to IT (Information Technologies), technology, ICT (Information and Communication Technologies), data, digitisation and digitalisation assessments, instead of digital.

- ICT is rarely referred to in tools but does appear in literature, particularly relating to countries in Africa and older tools.

- Well known legal entities in specific countries are commonly used to refer to nonprofits. Examples include: Not-for-profit organization (NFPO); Non-Governmental Organization (NGO) in the US; Associations in Canada, France and Spain; and Charities in the UK and Canada.

- Tools aimed at a broad range of organizations (with different legal entities) tend to use the term nonprofit (or not for profit), NGOs or social purpose organizations. Some are explicitly target at one type of organization in their country and will refer directly to them.

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Table 2: Key terms, working definitions and alternative terms from this research

Digital transformation — A purposeful and strategic approach to integrate technology and adopt digital ways of working into an organisation. This can fundamentallycchange their operations, delivery and business model — Digital maturity, journey, progress, challenges, strengths, skills, capacity, capability, adoption

Digital — 'Applying the culture, practices, processes & technologies of the Internet-era to respond to people's raised expectations' This follows a definition widely used in the UK from *Co-op digital* — IT, technology, ICT (Information communication technologies) tools, communications, social media, social network, online

Digital assessment tool — A self-assessment tool designed to support organisations with digital transformation. It poses a range of questions covering different aspects ofcdigital capacity, before presenting an assessment of where they are nowcand their strengths and weaknesses. This is often in the form of a visualisationcand is often presented as a score or stage on a framework — Survey, quiz, test, checkup, maturity framework, report

Non profit — Organisations established to create public benefit and further a social cause as their primary purpose, rather than making private profit for directors, members or shareholders. This is purposefully broad to include a range of different legal entities from across the world — Not-for-profit organisation (NFPO); Non-Governmental Organisation (NGO), Associations, Social enterprises, Civil Society Organisation (CSO), Voluntary Sector Organisation (VSO), Voluntary and community sector organisation, Social economy, third sector

Capacity building — The process of developing and strengthening the skills, instincts, abilities, processes and resources that organisations need to survive, adapt, and thrive in a fast-changing world — Strengthening, capacity, capabilities, skills development, skills building, resilience, health

Areas of digital transformation — The topics or subjects covered by a digital assessment tools and digital transformation literature. They often include key functions of an organisation, areas of operations, tasks undertaken by the same individual(s), recognised areas of professional practice, areas of regulation or areas of concern in the nonprofit sector — Themes, functions, domains, sections, categories or aspects of change

1.2 How digital assessment tools work

Digital self-assessment tools differ from research surveys, sector codes and principles of good practice, or other frameworks for digital transformation. Rather than gathering data on the sector, or providing an outline of best practice, they offer organizations instant feedback about their scores, strengths and weaknesses. This objective assessment can help leaders and teams to come together and define digital priorities for their organization. Many of the assessments seek to help this process further, offering further guidance, resources and routes into further support. In doing so, they offer reassurance as to how organizations can move forwards.

In terms of their technical set-up and design, digital assessment tools vary in nature:

- Some make use of third party survey tools (such as SurveyMonkey or Typeform) or an embedded web form is used by *NetHope*, *Uniformation*, *Digital Leadership*, *Arrk*, *University of Aarhus*, *SKILL IT*, *Infoxchange* and *NTEN*.

- Others have been developed as a purpose-built app, web-app or platform (see *Safaritec*, *NCVO*, *SCVO*, *Data Orchard* and *TechSoup*). These offer advanced functionality, such as combining and comparing scores across teams, organizations or sector benchmarks.

Whilst digital assessment tools look simple from a user perspective and mirror some elements of survey design, it is clear that a lot of effort has been invested into their setup and design. These tools are intended to have permanency and ongoing usefulness, as well as signposting organizations into further support.

Another unique quality of digital assessment tools (which makes them distinct from surveys), is that most are underpinned by a digital transformation framework. This outlines a theory about how organizations develop digital capacity and is typically described in terms of distinct stages of progression (usually between three and five) from basic to advanced digital capacity. Examples include:

- Ad hoc, functional, standardized, optimized, adaptive (*TechSoup*)

- Nascent state, conservative state, trend follower, digital state (*Nodo Ká*)

- Unaware, Emerging, Learning, Developing, Mastering (*Data Orchard*)

- Dinosaur, Tortoise, Panda, Tiger, Eagle (*Arrk*)

Some assessment tools use these frameworks to structure the response options available for every question they ask, giving a consistent clear scale for completion. Others use the frameworks less explicitly, giving different competency based responses to calculate scores.

However, there is limited evidence available about the use and impact of these tools. Furthermore, given the low levels of digital confidence and skills reported in various countries, nonprofits may struggle to see the value of a digital assessment and may not want a critical assessment or benchmark. Interesting reports have been published, including *NTEN 2020 Tech Accelerate Report*, *Nethope's The Digital Nonprofit Ability™ Assessment white paper* and *Data Orchard's 2020 State of the Sector Report*. To this end, further research and evaluations which share insights about successful and unsuccessful nonprofit (or support agency) experiences, as well as data about the overall usage and impact of these tools is a key area for development.

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1.3   Distinct approaches

1.3   Distinct approaches to digital transformation

The digital assessment tools we reviewed took one of the following 8 distinct approaches to assessing digital transformation. The first 3 of these are most common amongst nonprofit digital assessment tools.

1

Technology

These assessments focus on the ways in which technology can improve organizational effectiveness. They primarily ask about systems, tools and processes, as well as capacity for risk management, cybersecurity and data protection. They often cover internal collaboration, service delivery, marketing, fundraising, and impact measurement. Some also ask about capacity more generally, including staff skills, financing or leadership buy-in. From our sample, just under half adopt this approach, including: *NTEN*, *Solidatech*, *Infoxchange*, *TechSoup*, *SCVO*, and *Tech Impact*.

Strengths
Offer a focus on a fundamental aspect of digital transformation.

Weaknesses
It is widely acknowledged that digital transformation is about more than tools and technology. These tools neglect the leadership and culture change needed.

2

Tools and communications

These assessments focus on the use of digital tools to improve communications, both internally and externally. Questions focus on developing an online presence, through a website, SEO and social media, as well as the organization's ability to fundraise and use tools to manage contacts and donations. They may also focus on internal collaboration (such as sharing files and instant messaging) and the ability to work remotely and running online meetings. There is limited focus on internal systems beyond these functions. From our sample, just *SOCIALware*, *Asata* and *Safaritec* adopt this approach.

Strengths
These tools tend to be particularly accessible to those new to digital and offer a good place to start, working well as an initial health check.

Weaknesses
They cover a limited range of subjects and tend not to offer a holistic view of what digital transformation might involve.

3

Integrated

Tools with an integrated approach take a holistic assessment of technology, culture, innovation and service transformation. Questions cover a wide range of areas and are likely to focus on practice and ways of working, rather than asking about the existence of specific technology or tools. From our sample, just under half of the tools focus on digital transformation in this way. This includes: *SKILL IT*, *NCVO*, *Digital Leadership*, *Nodo Ká*, *NetHope*, *Data Orchard*, *University of Aarhus*, *Arrk*, *Uniformation*. These organizations tend to have a sector focused and capacity building remit.

Strengths
These tend to be comprehensive and allow organizations to look strategically at where they are and where they want to be.

Weaknesses
The array of topics may not help to determine what to prioritize (and prove to be overwhelming) if all areas are in need of development.

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1.3   Distinct approaches

4

Individual skills

These assessments test individual staff knowledge and competencies, to provide organizations with an overall assessment of skills and training needs. For example, *Tanu* fenables organizations to undertake digital skills tests for their teams, manage further training and track progress on their platform.

5

Specialized technical

These assessments focus in-depth on one key area of digital, often relating to a specialist function or concern. These work in the same way as other digital assessment tools. Examples include the *Data Orchard* data maturity assessment and the *Ford Foundation cybersecurity assessment* in the US.

6

Organization capacity

These assessments approach digital as part of a wider organizational health assessment and capacity building initiative. They typically contain a short section asking about internal systems and risks. *501 Commons* is a good example and *Hewlett Foundation* offers a useful list of tools in the US (although very few asked about technology or digital capacity).

7

Specialist sector

These assessments are designed and intended for organizations in a specific sector, which often have shared needs because of the way they work. For example, *SKILL IT* is aimed at the youth work sector and *Digital Compass* is designed for UK culture organizations. These tools tend to be developed in consultation with the sector.

8

Consultancy

These are designed for both businesses and nonprofits, with the intention of generating leads for consultancy. They tend to ask a small number of questions and ask for a sign up to take the assessment further. Some consultancies make these tools publicly available (such as *Digital Leadership* and *Arrk)*, but most offer their assessments as part of their services.

1.4 What they cover: 11 areas of digital transformation

In this study we examined how the digital assessment tools compared to one another, in terms of what they covered and the questions they asked. We found:

- There was a lot of consistency in the digital transformation areas covered
- Regional differences were not stark across the tools (although this is a small sample)
- Some digital assessment tools for small and medium enterprises look relevant to nonprofits (most were excluded from our sample)
- Digital assessments aimed at nonprofits' digital asked additional questions about fundraising, social media and communications, as well as social impact

We also examined how the tools differed from previous research mapping *UK-based digital assessments* in 2019. We looked at how they covered the 19 areas of digital transformation identified, categorizing each question in each tool against this. We discovered that this current sample of tools:

- Provided greater detail about the digital transformation framework, or theory of progress behind the tool, giving more comprehensive definitions and indicators of best practice. This was noted as a clear gap in the UK-based tools.
- Were more focused on technology, asking about systems and infrastructure in greater detail than UK-based tools.
- Did not cover any additional areas of digital transformation, although some covered different sub-topics (such as finance systems)

Given the consistency between the tools, there could be value in more coordination and shared standards between those who develop them. This is particularly pertinent as tools are updated and redesigned.

This process also highlighted a great deal of overlap between some of the 19 areas of digital transformation. In many cases, it was difficult to allocate a question between two complementary areas of digital transformation. To this end, we merged some of the areas, leaving 11 key areas of nonprofit digital transformation and updated the definitions accordingly (in line with the original 19 areas).

It is important to note that these areas of digital transformation are not given equal weight or attention by the digital assessment tools in our sample. Figure 1 highlights that the 7 most popular areas for assessment (covered by at least 10 of the tools) are:

- Internal systems
- Communications and fundraising
- Data
- Risks
- Culture, People and Skills
- Leadership and strategy
- Finance and sustainability

The next section gives further insight into each area, the types of questions asked and the indicators of digital transformation, as well as key gaps and reflections for those developing digital assessment tools.

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The 11 key areas of nonprofit transformation

1 Culture, people and skills
The ways in which an organization supports digital skills development and ways of working amongst staff and volunteers.

2 Internal systems
The IT infrastructure, hardware, processes, platforms and software that organizations adopt to work effectively.

3 Leadership and strategy
The ability of the Board, CEO and senior leadership to set a clear vision for digital within the organizational strategy and oversee this.

4 Risks
The processes, systems and infrastructure in place to responsibly manage data, privacy, security and risks, in line with regulatory requirements.

5 Communications and fundraising
How organizations manage their online presence and marketing strategically to connect with their audiences and fundraise.

6 Data
The capacity to collect, manage, store and use data from service delivery to inform decision making, service design and strategy development.

7 Finances and sustainability
The ability to understand digital costs and the approach to invest in digital strategically, resourcing for growth and evolution.

8 Services and social impact
How organizations design and provide effective digital services and use digital tools to understand their value and impact.

9 Accessibility and inclusion
Organizations offer accessible services which are inclusive of marginalized, underrepresented and digitally excluded communities.

10 Partnerships and openness
Organizations enhance their strengths by partnering with others, sharing learning, working in the open, using and publishing open data.

11 Innovation
Organizations develop a culture of responsible and future focused innovation, following digital trends to explore opportunities and risks to solve problems.

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1.4   11 areas of digital transformation

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Figure 1: Coverage of digital transformation areas across the tools

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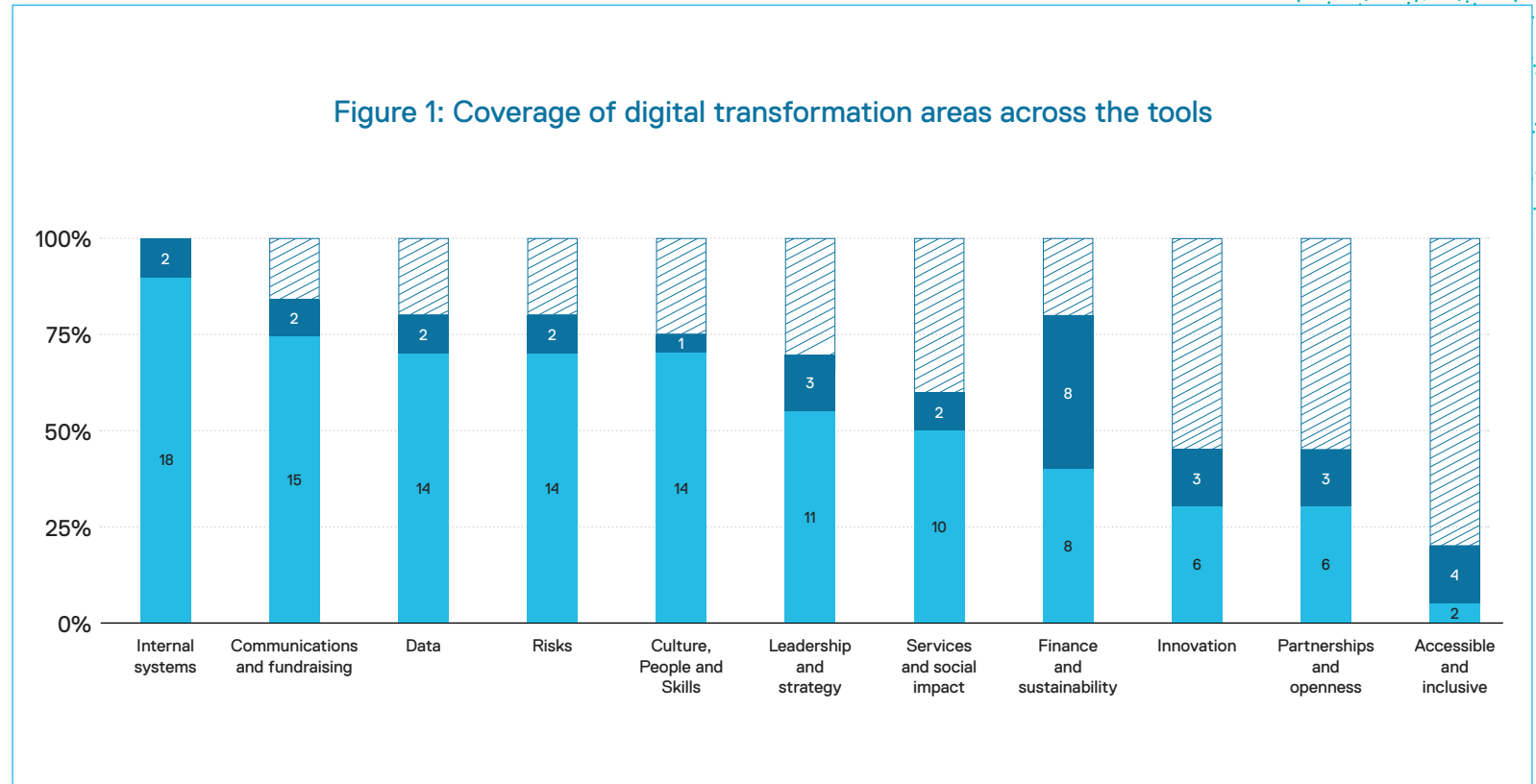
1.5 A deep dive into 11 areas of nonprofit digital transformation

Internal systems

The IT infrastructure, hardware, processes, platforms and software that organizations adopt to work effectively.

Unsurprisingly, this is by far the most important area for digital assessment tools, covered by all 20 in our sample, both explicitly and throughout other digital transformation areas.

Half of the tools ask about specific systems that exist. This is covered comprehensively by *TechSoup* and *NTEN*, which ask about systems across a range of organisational functions. Tools which describe themselves as quick or simple to complete (with less than 35 questions (such as *SCVO*, *Infoxchange*, *Nodo Ká*, *Safaritec* and *Uniformation*) also ask mostly about tools for communication and internal productivity.

Half of the tools ask more generally about how staff feel about internal systems and whether they are able to work effectively (see *Digital Leadership*). This is particularly true of those tools with an integrated view of digital transformation.

Reflections

Internal systems are clearly a vital component for digital transformation to assess across all of the tools, but this can be at the expense of assessing the wider leadership, strategy and culture change needed for digital transformation. There could be a greater balance of coverage or different approaches to signposting between comprehensive and focused tools.

Indicators of digital transformation

- Staff have the technology they need to do their jobs (up to date laptops, devices)

- IT infrastructure supports day to day work

- Interconnected tools and systems provide an effective internal user experience

- Organizations regularly assess and improve IT systems to ensure they meet their needs and keep pace with change

- Procurement processes help chose technology with the best fit for needs and budget

- Tools improve working lives for staff

- The organization uses these tools effectively

  - Business productivity tools (Office 365 and Google Suite)

  - Cloud-based file sharing and collaboration tools

  - Team communication tools (such as Slack, Microsoft Teams for messaging)

  - A database (such as a Customer Relationship Management system) for managing relationships with customers and/or beneficiaries.

  - Project management tools for teams (such as Trello or Asana)

  - Staff and volunteer management platforms

  - Online donations and payment tools (such as Stripe)

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Communications and fundraising

How organisations manage their online presence and marketing strategically to connect with their audiences and fundraise.

This is covered by 17 of the 20 tools sampled, with 15 of those covering it in detail. It is covered well by *TechSoup*, *Nodo Ká*, *Infoxchange*, *Safaritec*, *Solidatech* and *Asata*. It is the second most popular area of assessment after internal systems (and alongside risks).

Communications, marketing and fundraising are broad areas of work, but coverage is relatively consistent. Questions asked are primarily about tools (such as using email) and assets (such as an organization website), although 4 ask about strategies for use of digital in this area.

Most ask about the existence and effectiveness of an organization's online presence, primarily covering their website and social media (10 ask about this). Some tools ask about this in a lot of detail; asking about their Search Engine Optimisation (SEO) techniques and use of Google Ads to direct more people to their website. Interestingly, NCVO is the only tool to include a focus on content in-depth.

There is less of a focus on fundraising across the tools. This is covered in terms of the ability to take online donation payments and to fundraise online (with a few asking about crowdfunding).

Reflections

- Given the increased need for nonprofits to fundraise online rather than in person throughout the pandemic, many are likely to seek out further support in this area. This warrants further consideration.

- There is a strong focus on organizational websites, but this may be less relevant to smaller and newer charities who may rely on other social networks to build their online presence and brand identity.

Indicators of digital transformation

The organization:

- Has a responsive, engaging website that tells our story, can be easily shared and attracts supporters and clients.

- Takes donations through their website and tracks current/prospective donors

- Actively monitors and works to improve website engagement and search rankings

- Appears on the first page of relevant search results and attracts good numbers of engaged visitors to our site.

- Uses Google Ad Grants to promote the work and services

- Regularly sends an electronic newsletter to subscribers

- Regularly posts engaging content on social media and our community responds

- Has a clear integrated brand and communications strategy

- Plans, coordinates, and measures the effectiveness of fundraising campaigns.

- Tracks engagement with marketing efforts and seeks feedback

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Data

The capacity to collect, manage, store and use data from service delivery to inform decision making, service design and strategy development.

16 of the tools cover data, yet despite the breadth of coverage, the treatment of data is fairly narrow.

For a lot of the tools, data is synonymous with internal systems and other key areas of digital transformation. These include internal systems, technology and tools used for marketing and communications (using a CRM, tracking fundraising), service delivery, programme management and measuring social impact. Furthermore, some tools cover data purely as a risk and focus on key regulation or general data protection and privacy issues.

When data is covered in any depth, questions tend to cover data tools, the quality of data collection, skills to analyze data and the use of data to inform strategic decisions. Good examples of this include *Data Orchard* and *NCVO*.

Reflections

- When assessments integrate questions about data capacity with other areas of digital transformation, they tend to ask about tools and processes, but not about data skills and strategy. A specific focus on data is valuable at this point in time.

- There is very limited coverage of the use of open data or open standards, which is widely cited as a key principle for digital development (see the *Digital Principles for Development* and the *NetHope* tool).

Indicators of digital transformation

The organization:

- Has good tools and systems for collecting, storing and managing data

- Collects the right data (relevant, meaningful, necessary) consistently and efficiently

- Has rich data that is complete, accurate and up-to-date

- Understands the limitations of the data collected

- Can report on data in meaningful and useful ways to stakeholders

- Analyzes data for diagnostic purposes to explore causes, patterns and correlations

- Undertakes predictive analysis about what will happen in future (e.g. forecasting, modeling trends, behavior patterns, machine learning)

- Uses statistical methods to predict the future performance of our products and services and make proactive decisions

- Uses live data, reports and analysis to shape decisions and improve processes

- Uses data to gain credibility and influence externally

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⚠ Risks

The processes, systems and infrastructure in place to responsibly manage data, privacy, security and risks, in line with regulatory requirements.

After internal systems, this is the second most assessed area of digital transformation. Furthermore, the two are often questioned hand in hand within these tools. It is particularly well covered by *TechSoup*, *Infoxchange*, *NTEN*, *SCVO* and *NCVO*.

Risks are largely assessed as an operational and technical concern, often in terms of cybersecurity and data protection. Those which are based in countries with strong regulatory frameworks and legislation tend to reference these and include more questions on the area in total. For example, the *General Data Protection Regulation* (GDPR or RGDP) for data privacy is widely asked about in European tools and the *Essential Eight* for cybersecurity in Australian tools. This may be a key motivator for organizations to seek a digital assessment tool, in order to build their practice in this area.

Questions typically ask about processes to identify and mitigate risks, staff training and compliance, policies, security measures and the ability to meet regulatory requirements.

Reflections

- Risks are well covered in the tools sampled, but often in a light touch way. It is worth exploring the *Ford Foundation Cybersecurity Assessment*, which covers a much broader view of risks and the role of leadership to build on this.

- Tools which focus on operational and technical risks could be off-putting to those trying to influence strategic change in their organization.

- With increasing remote service delivery, there could be more attention to the privacy and security of users within digital assessment tools.

Indicators of digital transformation

- The organization is experienced in identifying risks and mitigating them

- There are plans for responding to a cyberattack, security incident or data management breach, or the failure of business-critical systems

- The organization assesses networks, systems, applications and data for vulnerabilities that could be exploited in a cyberattack and addresses those

- Maintain software to provide security for its network, systems, applications and data

- There are password policies and firewall in place

- The organization complies with laws, core regulatory requirements, standards and policies on security and safety measures

- The organization is transparent about how data is used and has clear policies on this

- Data is held and managed securely and safely

- Leadership understand and take ownership of managing digital risks

- The privacy and security of users are considered in the design of new services

- Staff understand their responsibilities for keeping data and technology secure

- Staff are good at identifying and responding to attacks as well as anticipating threats

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Culture, people and skills

The ways in which an organisation supports digital skills development and ways of working amongst staff and volunteers.

This is covered by 15 of the 20 tools sampled and comprehensively by *Nodo Ká*, *Data Orchard*, *SKILL IT*, *NCVO*, *Digital Leadership*, *University of Aarhus* and *Uniformation*.

Most tools ask about staff skills. Questions focus on their ability to use internal systems and technology effectively (see *NTEN*, *TechSoup*, *SCVO*) or their confidence to adopt new digital tools and ways of working. Some tools also ask about auditing staff skills and providing training, as well as their ability to attract, develop and retain digitally capable staff.

Culture is less well defined, but tools describe best practice (in their framework) in terms of staff being keen to innovate and proactively exploring ways to address problems, improve services or productivity through digital. They also ask about sharing learning and expertise internally (see *NCVO*, *Digital Leadership*, *University of Aarhus*).

Reflections

- Specialist skills, roles and functions do not feature in many tools (this may be due to the complexity for organizations of different sizes and scope).

- Two tools (*NTEN* and *Solidatech*) ask about contingency plans for key digital staff leaving which will be pertinent for smaller organizations and those with limited digital skills in-house.

- Organizational culture questions warrant development to reflect a growing interest in agile development and nonprofits adopting 'user centered' design principles.

Indicators of digital transformation

- All staff, volunteers and trustees have confidence and motivation to learn digital skills

- Digital skills are audited, gaps identified and plans in place to tackle them

- There are digital skills in staff development plans and job descriptions

- The organization can attract, develop and retain digitally capable staff

- The organization has the right digital expertise in place

- There is a confidence to bring together right skills for projects (technical skills, subject expertise, user insight and design) with the right support

- Staff proactively explore ways to improve services or productivity via digital solutions

- The organization's culture supports behaviors that enable effective use of digital, such as testing and learning, openness to new ideas and collaboration.

- Users' needs and behaviors are understood across the organization and form part of decision-making at all levels

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Leadership and strategy

The ability of the Board, CEO and senior leadership to set a clear vision for digital within the organisational strategy and oversee this.

Leadership and strategy was covered by 13 of the tools sampled. Tools from *University of Aarhus*, *NCVO* and *NTEN* are particularly comprehensive. It is more likely to be covered in those tools which offer in-depth assessments and those with an integrated focus on the role of digital throughout the organisation.

Most tools ask about strategy. A few ask specifically about the strategy to invest and develop internal systems and technology (see *TechSoup*, *Infoxchange*, *NTEN*, *University of Aarhus*). Most ask broader questions on a strategic approach to digital transformation and the role of digital in the organisation's overall strategy and vision. Coverage of leadership is patchy across the tools (although this is often tied into questions about strategy) and tends to ask about their support for digital transformation, their strategic oversight of digital and their vision for digital within the organisational strategy.

Reflections for those developing digital assessment tools

- It is surprising that this area of digital transformation is often overlooked by some tools and only covered briefly in others. This warrants further attention.

- The coverage of leadership warrants further attention alongside strategy, given that the two will go hand in hand.

Indicators of digital transformation

- There is a clear vision, purpose and plan for digital transformation across the organization.

- The organization strategy is ambitious about how digital will help achieve the mission and vision.

- There is an IT strategy, aligned with the organizational strategy.

- The digital strategy has been informed by staff and is well understood.

- Leaders understand how technology and their user needs are changing, factoring in the risks and opportunities into their plans.

- Leaders have the skills to develop and deliver their organizations' digital strategy.

- Leaders play a critical role in spearheading digital change.

- Leaders are continually developing the knowledge and skills to lead digital change.

- Digital expertise exists at a senior level and informs strategy development.

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Services and social impact

How organisations design and provide effective digital services and use digital tools to understand their value and impact.

There is some regional variation in how this area is described. Some tools refer to social projects and programs, as opposed to services. Tools targets at businesses will refer to customers and users, whilst those aimed at nonprofits may ask about beneficiaries and clients.

14 tools cover this area, although 7 cover this incredibly briefly. Those covering this area well include *Infoxchange*, *Data Orchard*, *SKILL IT* and *TechSoup*.

This area is primarily covered in terms of how the organisations use platforms to manage service delivery and report on impact. Questions ask about tools for case management, data collection, booking appointments or events and project management. Some tools also ask about delivering services remotely and developing digital first services (Infoxchange and Digital Leadership).

A few tools, namely those which are UK based, also ask about digital services informed by user research and service design approaches (see *NCVO*, *Digital Leadership*). Three tools (*Arrk*, *NCVO* and *Asata*) also ask briefly about responding to customer satisfaction, reviews and feedback.

Reflections

It is surprising that service innovation is rarely questioned and user centered design (also referred to as human centered design and service design) is a clear gap in the assessment tools. These practices prioritize co-creation of digital services with users, encourages service innovation and helps develop a digital culture.

Indicators of digital transformation

- Digital tools are integral to service delivery, project management and data collection
- Programs and services are designed with a digital first experience
- Insights from data are used to make changes to or target products or services, improving the impact they have
- The organization collects monitoring and impact data whilst a service is being used
- Multiple evaluations, including external evaluations, are used to understand if a digital service is having its intended impact and how to improve it
- The organization experiments with digital channels to engage participants in services
- Services are designed based on user research and user testing
- Users are involved in the design and development of technology projects
- User research is regularly undertaken to understand user needs and behaviors
- Organizations develop new digital services when user needs are not currently met by existing options

Finances and sustainability

Finances and sustainability: The ability to understand digital costs and the approach to invest in digital strategically, resourcing for growth and evolution.

This is covered by 12 of the 20 tools sampled, but is not covered in any great depth by any of the tools. It has varied and patchy coverage. In other words, there is no clear definition or consistent interpretation of what nonprofits should be considering when it comes to their finances or sustainability. It is rarely framed as an area for attention in digital transformation tools. However, there is some consistency in the types of questions asked.

Overall this is covered either two ways. Most of the 12 tools cover budgeting for technology, including investing in new technologies or innovation. *NetHope* for example asks about dedicating appropriate resources to digital trials, digital strategy, digital governance and digital project delivery. *Digital Leadership* and NCVO both ask about budgeting for improving and evolving technology. None of the tools ask about budgeting for core digital roles or expertise in house, or for the costs of training and development to upskill staff.

A smaller proportion ask about the use of online accounting systems in financial management. *TechSoup* in particular asks about financial planning, accounting, bookkeeping, payroll and time tracking systems. This is not covered by any UK tools.

Reflections

- Digital assessment tools could do more to encourage organizations to consider their resourcing of IT (now and in the future) and their use of cloud based accounting in financial management.

- This research has not uncovered any guidance on budgeting for the costs of digital transformation (beyond digital projects) or what nonprofits of different sizes should expect to invest in IT and technology.

- None of the tools focus explicitly on business model development, to ensure the organization or a specific digital product or service is sustainable. Tools could ask more about sustainability plans, budgeting for digital projects before undertaking them and whether they are exploring new business models.

- Nonprofit digital assessment tools could benefit from looking at how corporate tools ask about competitors, partnerships and supply chains.

Indicators of digital transformation

- A sophisticated cloud based accounting and financial management systems to produce timely financial reports and forecasts

- Able to understand and budget for the ongoing costs of supporting, maintaining and improving technology

- Has a technology strategy and resources this effectively

- Plans for and resources efforts to respond to new technologies and innovation

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Partnerships and openness

Organizations enhance their strengths by partnering with others, sharing learning, working in the open, using and publishing open data.

This is not covered widely, but is just touched on by 9 of the tools and to some extent overlaps with culture, services and innovation. What makes this a distinct area of focus is the additional attention to external relationships with the sector, rather than focusing solely on the organization itself and internally. This is a stronger component of UK based tools (although others do cover this). *NTEN* offers a good example.

It is covered in different ways by each tool, but there does not appear to be a pattern in where or how this is covered. Some tools focus on data, whilst others focus on relationships with key partners and stakeholders.

Reflections

- Partnerships and openness warrants further attention. It will be of interest to those advancing with digital transformation, because it underpins innovation. It will also be relevant to those with limited digital capacity, who could benefit from others' expertise.

- Most other areas of digital transformation encourage nonprofits to look inwardly at what they do and how they work. A focus on partnerships and openness will help encourage a focus on where they sit in the ecosystem.

Indicators of digital transformation

The organization

- Has a well defined understanding of their gaps in knowledge, reach or capability

- Actively seeks to engage partners to strengthen a product or service

- Looks to avoid duplication and builds on existing knowledge when developing digital products and services

- Uses publicly available open data sets and learning to inform their work

- Align with and makes use of nonprofit sector standards and benchmarks

- Shares learning, code and practice so that others can build on their work

- Shares data with nonprofits and governments who serve the same people

- Leaders openly share best practice and other information about the organizations' technology experience with other nonprofits

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Innovation

Organizations develop a culture of responsible and future focused innovation, following digital trends to explore opportunities and risks to solve problems.

Innovation is only covered by 9 of the tools sampled and it is covered most by *SKILL IT*, *Uniformation* and *University of Aarhus*. It is surprisingly, much less popular and covered much less extensively than other areas of digital transformation in this group of assessment tools.

Innovation is largely asked about in three main ways: exploring new technologies, service innovation and piloting new approaches as well as fostering a culture of innovation amongst staff. Some also ask about investing in and budgeting for innovation, but these have been included under finance and sustainability in this project. Interestingly, *NCVO* and *SKILL IT* also ask about responsible and ethical innovation, whilst *Solidatech* asks about the ethics of choosing platforms.

Reflections for those developing digital assessment tools

Responsible and ethical innovation will be of particular interest to nonprofits and warrants further consideration, as does the choice of free and open source platforms and technologies. This is an emerging area for development across the tools.

Indicators of digital transformation

- New services make effective use of new technologies, responding to a user need or addressing a specific problem

- The organization prioritizes user research and service design (in-house or bought in)

- The organization invests significantly in people and processes to be at the forefront of effective technology

- The organization regularly explores emerging technology, trends and issues that may impact on their work or could develop their business models and operations

- There is a culture that values experimentation and the importance of developing new ideas, solving problems or finding better ways to do things in order to solve problems

- Staff evaluate and reflect with peers about their use of digital technologies, in order to innovate and improve their practice.

- There is a member of staff reporting on risks and opportunities in digital to leadership

- The organization spends time looking to understand digital trends that could impact on them or their beneficiaries, now and in the future

- When choosing or developing technology the organization reviews the implications for users, possible risks and what might happen

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Accessibility and inclusion

Organizations offer accessible services which are inclusive of marginalized, underrepresented and digitally excluded communities.

This area is rarely covered in this sample of digital assessment tools with 6 including questions about the extent to which digital services, systems, solutions or technology are inclusive and accessible. *NTEN*, *SKILL IT*, *NetHope* and *NCVO* offer good examples.

The tools which do cover this ask about whether the organization is able to meet accessibility requirements (primarily in terms of their website). *Safaritec* also asks about the accessibility of online events and meetings. Interestingly, *SKILL IT* and *NetHope* ask about digital inclusion and support alongside digital service offers. *NCVO* also asks about inclusiveness more broadly. However, none of the tools focus on addressing diversity or being inclusive of diverse users and user needs.

Reflections

- It is vital that more tools emphasize the importance of developing and testing websites and web tools for accessibility.

- COVID-19 has shone a light on the need to tackle digital exclusion in many countries. Creating services which are accessible to those with varied digital skills will be important to nonprofits.

- COVID-19 has also highlighted the depth of racism and discrimination in society, as well as in the nonprofit sector. Digital services need to be inclusive by design, in order to avoid perpetuating further marginalization and exclusion of under-represented groups. Encouraging organizations to reflect on how inclusive they and their services are is a key area for development.

Indicators of digital transformation

- Content and websites are built and tested for accessibility, meeting key guidelines and requirements

- Digital tools work with assistive tech

- Online meetings and virtual events are accessible and designed to be inclusive

- Content is created and written in a clear and accessible way

- Content is reviewed for the ways in which it represents the communities it serves

- The needs of users who are digitally excluded are properly considered (including those in vulnerable circumstances) and offline channels are considered where appropriate

- Organizations design services for inclusivity at every stage

- Organizations understand user needs and the barriers users might face in using a tool or service

- Services are made as accessible and inclusive as possible

- Organizations have systems in place to responsibly consider digital inclusion, diversity, transparency and the potential changes emerging tech may influence

- Users are involved in planning and decision-making processes for technology projects

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1.6 Conclusion: Gaps and opportunities

This research has uncovered advanced digital assessment tools available in the UK and the USA, as well as in Australia, Denmark, Spain, France, Latin America and Ireland. It is positive to see digital assessment tools designed by and for the nonprofit sector, as well as by agencies dedicated to nonprofit digital transformation. There are also encouraging signs of emerging support for digital capacity building designed for and by nonprofits across the world, which are increasingly based on well researched and tested frameworks.

However, the landscape is rapidly changing. During the course of this short research period, some tools became inactive, others were relaunched and new tools were being developed. With this shifting context in mind, it is worth highlighting where there is currently common ground, gaps and opportunities across the landscape of digital assessment tools.

Common ground

This project has highlighted how digital assessment tools work to provide a support tool for nonprofits when they are grappling with digital transformation plans. A tool alone can only play a small role in this process, but can connect into valuable support.

Given the breadth of digital assessment tools there is clearly no one size fits all and it is unlikely that there is a 'best' way to assess or support digital transformation. Each tool has its own use case, context and intended audience (although this is not always clear).

However, there is consistency (rather than uniformity) across the tools in focusing on 7 areas of digital transformation (there are of course alternative ways to cut and combine these): Internal systems; Communications and fundraising; Data; Risks; Culture, People and skills; Leadership and strategy; and Finance and sustainability.

Gaps

- **User insights:** Most tools do not specify a target audience, only some publish data about usage and there is limited research on the experiences of nonprofits.

- **Marketing:** The tools are difficult to find online and are unlikely to have extensive reach and use. Further investment in marketing (and associated support) would be beneficial to nonprofits (who may lack awareness or confidence to seek them out).

- **Broader coverage of digital transformation**. There is limited coverage of services and social impact, innovation, partnerships and openness, accessibility and inclusion.

- **Coverage of culture** needs development in terms of becoming a 'user centered' or 'beneficiary centric' organization, connected to good *digital design principles*.

- **Business model development**. Tools currently have limited questions about sustainability plans, budgeting for digital projects and new business models.

- **Responsible and ethical innovation** is under explored and will be of interest to nonprofits, particularly given potential impacts on marginalized groups.

- **Accessibility and inclusion**. Tools need better consideration of digital exclusion and ensuring accessibility, diversity and inclusion.

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Opportunities

- **Investment:** Many of the tools have glitches and are in need of updates. Others would benefit from a significant overhaul. There are also opportunities for new targeted tools. These require investment (time and money) for research, design, development and marketing.

- **Publishing, sharing and combining data:** Given the wealth of surveys, tools and data collection about digital maturity, there would be value in exploring shared datasets. This could save duplication of nonprofits' time and energy as well as giving a better picture of progress at a sector level. Ideally, tool developers should look to feed in to a common database that is in the open and leads to new ways to identify and offer the support nonprofits need. However, many tools are owned by small organizations, with limited efforts to share data thus far. As a starting point, tool developers should look to collect and share consistent data about their users.

- **Tools dedicated to small organizations:** Whilst many tools are accessible to small organizations and intended to be inclusive of all nonprofits, none are designed specifically for them. It is likely that their digital transformation looks very different as highlighted by the *Charity Digital Code*, which differentiates by size. Tools should be adjusted for smaller organizations, which may need a slower or longer journey, depending on skills, resources and funds.

- **Tools dedicated to digital first and newer organizations:** This is highlighted by the *Euclid project*, which suggests these organizations will have very different trajectories, skills and support needs. New organizations have the rare chance to begin with optimal digital solutions and this is an opportunity to secure organization efficiency, sustainability and effectiveness.

- **User research:** To better understand how nonprofits are using specific tools and their experience as part of a digital transformation process. This might include a survey to find out what they would suggest as improvements, combining feedback captured from tools themselves or interviews to understand the context. This could also test implications of a strong focus on risk, comprehensive assessments and simple assessments.

- **Shared learning:** There is limited coordination of those involved in delivering digital assessment tools. Opportunities to share practice, data, insights and plans would help develop shared knowledge and improvements to tools and support.

In light of the widely reported need for digital transformation amongst nonprofits reported following the advent of COVID-19, there is a clear need for better resourced, designed and marketed support to build digital capacity support. A stronger field of mature digital assessment tools, connected into this, could play a key role here.

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Section 2
Digital Assessment Tool Profiles

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TechSoup Digital Assessment Tool

The TechSoup *Digital Assessment Tool* (DAT) launched in 2021 as a free global resource for non profits on the path to digital transformation. It was created in collaboration with leading technology experts and civil society partners from around the world.

TechSoup is a US based global network of non-governmental organizations that supports nonprofits, charities, and libraries by providing access to donations and discounts on software, hardware, and services from major brands.

What it assesses

The DAT is based on TechSoup's Digital Transformation Framework (*detailed in this blog post*). It guides users through questions in 6 key functional areas of nonprofit operations: Programs; Fundraising; Communications; Operations; Security; and Infrastructure. These assessments collectively cover 27 subcategories and 85 topics.

Organizations are given a score based on five stages of digital capability: Ad Hoc; Functional; Standardized; Optimized; and Adaptive. The 'Adaptive' stage is the highest level, which is met when 'organizations consistently evaluate technology for strategic advantage and invest significantly in people and processes to be at the forefront of effective technology'.

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Rating and Recommendations for
Introductory Assessment

Assessment Taken by

NR **Nissa Ramsay**
Completed Sep 30, 2021

1 AD HOC | 2 FUNCTIONAL | 3 STANDARDIZED | 4 OPTIMIZED | 5 ADAPTIVE

Functional organizations make some investment in people, processes, and technology solutions in order to meet immediate day-to-day needs.

Recommendations for This Category | 34 Total Recommendations

Donor Management | 17 Recommendations
Fundraising and Development

Resource Details	Est. Time	Cost
Choose the Right donor management Software Through TechSoup Article If you're looking for donor management software, this table lists the major features of all the products we offer.	0.02 Hours	Free
Types of Databases for Managing Constituents Article Though there's no single system or even single type of system to support every nonprofit, there's a plethora of different types of constituent management systems, each with its own specific set of strengths and weaknesses that will overlap in various ways with the things you're looking to support.	0.22 Hours	Free
Why Your Nonprofit Needs to Consider Project Management Article Adopting a project management system should be a top priority this year. No matter what size your nonprofit may be, the benefits of a dialed-in approach to project management far outweigh the effort it takes to get a system up and running.	0.15 Hours	Free

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2.1 United States

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How the tool works

There is a simple registration form to complete before you can access the tool for free. Once registered you answer basic questions about your organization (number of staff etc) and are able to access a tool dashboard. Once logged in, you can work on, save and return to assessments. The tool consists of two types of assessment:

A A 20 minute introductory assessment, covering the first three questions of each area of the full assessment.

B The organisation can then complete a full assessment, with a total of 85 questions (65 in addition to the introductory assessment).

Upon completion, the DAT provides an overall score and recommended solutions specifically tailored to the needs of the organisation. This support includes signposting to supporting blogs in the website for advice. The dashboard enables you to designate specific goals your organisation can complete and a space to allocate tasks, such as reading key blog posts, to the user and other team members (these are also sent via email). The tool is designed to encourage you to track progress and to reassess your organisation over time.

Summary

This is a comprehensive, well researched and intuitive assessment for nonprofits. The breadth of coverage means it is particularly well suited to medium and larger organizations and will be of interest to those wanting an in-depth assessment of their infrastructure, systems, technology and solutions implemented across their operations.

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USA   **English**   **Nonprofit**

NetHope Digital Nonprofit Ability (DNA) Assessment

The *Digital Nonprofit Ability (DNA) Assessment* by NetHope is designed to be accessible to all nonprofits wanting to develop their digital capability. It is an automated, online social sector benchmarking tool that allows organizations to make decisions about how to begin their digital transformation journey. The tool was formerly exclusively available to NetHope members but is now openly available and free for all to use.

The *NetHope Solutions Center* is a US based space, where NGOs and like-minded organizations can find ICT and cloud solutions to a full range of business problems and program challenges.

What it assesses

The survey measures and provides insights on relative strengths and weaknesses across six areas The survey measures and provides insights on relative strengths and weaknesses across six areas of nonprofit digital transformation. These include Readiness (overall mindset); People; Process; Technology; Data; and Investment. Overall, the tool gives a stage of digital transformation for the nonprofit, which are: Tech enabled; Automated; Connected; and Digital. They explain *"Digital nonprofits start with People changing the way they work through redesigned Processes made possible by Technology." The Digital Nonprofit Ability™ Assessment white paper* gives a comprehensive overview of the DNA and the results of the first round of assessments, providing some benchmarks for comparison.

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NETHOPE SOLUTIONS CENTER

How the tool works

The DNA assessment comprises 90 questions and takes approximately 30 minutes to complete. There is no signup required, but there are compulsory questions about the organization and contact details in order to proceed. The tool consists of a Typeform survey embedded in the website. The questions are compulsory (you cannot skip any) and each must be answered four times, from the point of view of yourself, other staff, mid-managers, and executives. Each has a drop down list using the same criteria: not at all, occasional, clear, replicated, and better. The last two questions for free response ask what you might have done for your results to have increased or decreased since last assessment. Once completed a summary report is emailed through with a series of scores captured against each of the survey areas. The tool does not provide additional guidance, resources or recommendations.

Summary

This tool is accessible to those with limited technical knowledge and is suitable for those at all stages of digital transformation. It is most relevant to larger nonprofits, given compulsory questions about the charity brand and headquarters, as well as the need to answer questions from different points of view (smaller organizations may not have this hierarchy). The tool covers a wide breadth of digital capabilities, including questions around collaboration, open source and digital inclusion (which are not widely covered by other tools). It will appeal to those wanting to take a holistic view of digital across their organization although it does not cover communications, marketing and fundraising. There are no tailored recommendations or suggested next steps, although their *white paper* does include helpful general benchmarks and visualizations.

Digital Nonprofit Ability™ of NetHope Members
Aggregated Results

■ Sector DNA Benchmark ● Responding NetHope Member Organizations
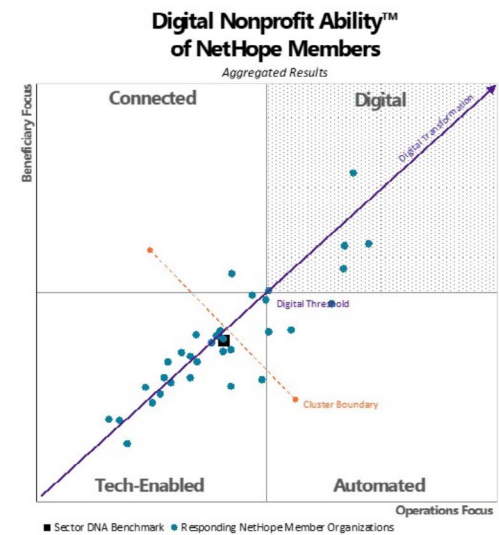
The Digital Nonprofit Ability

Key Findings

- Most NetHope members are
  - **Tech-Enabled** nonprofits
  - Ready to begin digital transformation
  - Tightly aligned up to the Cluster Boundary with notable scattering beyond

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`USA` `English` `Nonprofit`

Tech Impact Technology Assessment

The *Tech Impact Technology Assessment* developed by Tech Impact, is a free tool for nonprofits to assess the state of technology in their organization.

Tech Impact is a US based nonprofit whose mission is to empower communities and nonprofits to use technology to better serve our world.

What it assesses

The assessment asks users to answer questions about how well technology is functioning and helping to achieve their organization goals across five dimensions:

- Infrastructure
- Data Management
- Online marketing and outreach
- Program and service delivery
- Governance

The framework focuses on three stages of development: Low; Medium and High. For those at the highest level, the tool described how *'technology is an asset for your organization. You are leading your peers in understanding trends and strategically aligning technology with your mission and goals.'*

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How the tool works

The tool asks you to register and then complete 20 questions (taking approximately 10 minutes) about the state of technology in the organization. These are broken up into five dimensions, each with 3-4 questions. Upon submission, you receive an email message with your results with a score (of low, medium or high) against each dimension. The results will also give you a short summary that explains which areas to prioritize for learning and investment. It also includes links to articles, workbooks, on-demand courses, and other resources to support next steps. These are not directly tailored to the responses but help to develop skills across each dimension.

Summary

This tool is very simple to use and complete, touching on key areas of digital transformation in a light touch and digestible way. It will be particularly appealing to small organizations and those at an early stage of digital transformation. There are useful guides and follow up resources (although these are not directly tailored to responses). However, it will be less relevant to those looking to assess their leadership, strategy or digital skills and culture as part of their digital transformation.

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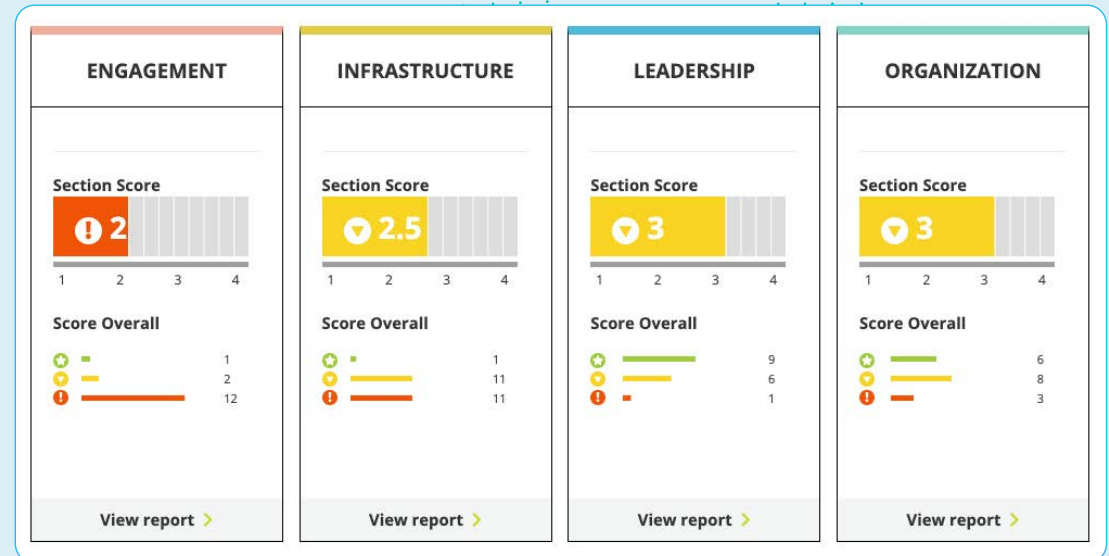
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NTEN Tech Accelerate

Tech Accelerate by NTEN is a US focused tool, offering nonprofits a free benchmarking assessment of their technology use and policies.

NTEN is a US based organization that supports nonprofits fulfilling their missions through the skillful and racially equitable use of technology. They support nonprofit organizations by convening the nonprofit community, offering professional credentials and training, and facilitating community skill and resource sharing. They also publish a range of resources and research reports, including the *NTEN 2020 Tech Accelerate Report* based on the insights from their tool. Organizations from 135 countries from all over the world use Tech Accelerate and participate in NTEN courses.

What the tool assesses

Tech Accelerate is a free comprehensive assessment tool that looks at both the practices and culture of technology in a nonprofit, as well as use and investment. With over 70 questions in four categories (Engagement, Infrastructure, Leadership, and Organization), Tech Accelerate assesses a nonprofit's technology adoption level and highlights areas in need of the most investment.

ENGAGEMENT	INFRASTRUCTURE	LEADERSHIP	ORGANIZATION
Section Score	**Section Score**	**Section Score**	**Section Score**
! 2	▼ 2.5	▼ 3	▼ 3
1 2 3 4	1 2 3 4	1 2 3 4	1 2 3 4
Score Overall	**Score Overall**	**Score Overall**	**Score Overall**
✪ — 1	✪ — 1	✪ — 9	✪ — 6
✪ — 2	✪ — 11	✪ — 6	✪ — 8
! — 12	! — 11	! — 1	! — 3
View report ›	View report ›	View report ›	View report ›

THINK SOCIAL TECH | techsoup GLOBAL NETWORK

nten

How the tool works

The tool requires you to set up an individual account and connect this to an organizational profile. The organizational profile allows anyone connected to the profile to also find, view, and contribute to the organization's assessment, regardless of who created it. You can also directly invite colleagues to contribute any time, by directing them to the website or sending them an invite email. Once registered, anyone can start an assessment.

This assessment comprises four key categories, with 70 questions across them. Each question is answered by moving a slider along a scale from 'not at all' to 'comprehensively'. The tool saves your responses so that you can seek input from other people or return to the tool and complete later. Once you submit the completed assessment, you receive a customized report that identifies the areas most in need of investment or improvement. Tech Accelerate allows for approximately 20% of the questions to be skipped and a report to be generated (these are noted in the report for transparency).

The report also includes ranking to compare with similar organizations, as well as resources to help develop technology capabilities. All reports submitted are saved and viewable in the 'Report History' section and accessible to those connected to the organization's profile. The organization profile data enables real time benchmarks that you can assess from a report.

Summary

The tool will be of interest to nonprofits in various countries across the world. It is comprehensive and covers technology use and culture across a range of areas. Once registered, the tool is user friendly and easy to navigate. It has helpful options to save the report, incorporate multiple users and allows you to track progress overtime, as well as contributing to sector benchmarks.

THINK SOCIAL TECH   techsoup GLOBAL NETWORK

USA   English   Nonprofit

501 Commons organisational Assessment

The *501 Commons organisational Assessment* is a free tool for US nonprofits to assess the health of their organization and identify next steps to develop.
501 Commons is a US based organization that serves nonprofits as experts, innovators, and partners. Their passion is to amplify the strengths of nonprofits -so all people and communities flourish.

What it assesses

The 501 Commons organizational Assessment is dedicated to a holistic model for a healthy nonprofit (and technology is a component of this) which includes:

- Strong governance and oversight

- Good management and a healthy organizational culture

- The resources to carry out your mission and accountable management of funding

- Communications and relationships with people who give you money, use what you create, help you meet your mission, and carry your message

- Efficient and effective programs, services, and administrative systems

Governance & Boards
The engagement and accountability of the board of directors is essential to a high-impact nonprofit.

More About Boards

Fundraising & Financial Management
A nonprofit's mission can be accomplished only if it has the resources it needs.

Take the First Step

Communications & Relationships
Relationships with donors, volunteers, staff, clients, and the community sustain your organization.

Learn More

Planning, Technology, & Administration
Having a clear and well-resourced administrative mission will super-charge your organizational mission.

Start Today

Management & Culture
The management skills and internal culture of the organization are more influential than a big bank account.

Make Change Happen

THINK SOCIAL TECH | techsoup GLOBAL NETWORK

2.1   United States

How the tool works

The Self-Assessment tool is designed to tell you how your organization is performing based on 58 standards. The tool has a series of short multiple choice questions under 8 areas to answer. The tool has two options for completion:

Option 1

Online Self-Assessment, results report, and recommendations. Gather a team of people who know the most about the organization. Three to five people would be good. Download a copy of the standards for everyone. Each person reviews the standards, focusing on the areas that relate to their work. The team then reviews and then one person enters the scores into the online free Self-Assessment.

Option 2

501 Commons consultants provide 25-35 hours of consulting to help a team identify priority areas for improvement and provide customized recommendations. Thanks to support from the Satterberg Foundation, the cost is currently $1,200.

Summary

This tool is designed and most relevant to those wanting a wider organizational assessment. However, technology is positioned as instrumental to a healthy nonprofit, there is a fairly brief and limited assessment of capabilities. Questions focus on risks, internal systems and data management, as well as financial resources, and social impact reporting. There is no focus on skills, culture, leadership and strategy. Functionality wise, the tool has a poor user interface and is difficult to engage with.

The Five Elements of a Healthy Nonprofit

Self-Assessment Completed on

October 1, 2021 by Think Social Tech

Average Score for Each Element and Subsection

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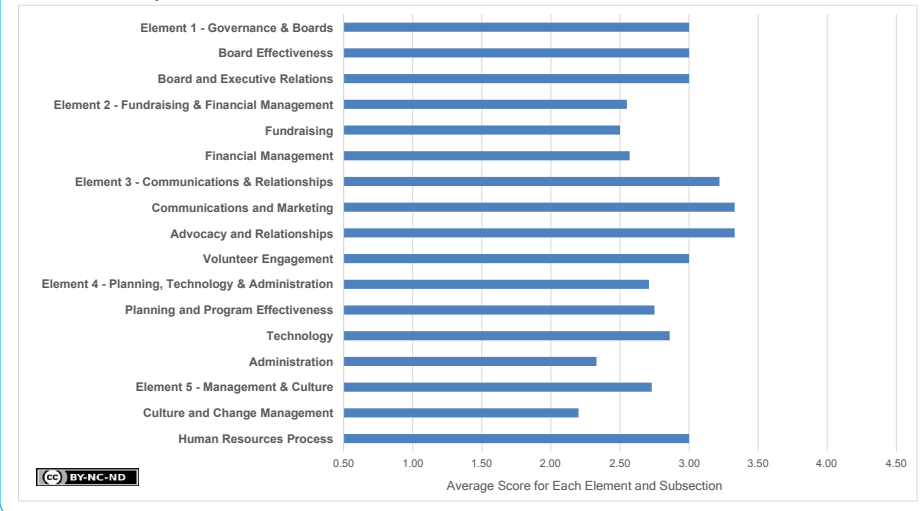
2.1 United States

ALGORHYTHM

USA   English   Intermediaries

Algorhythm iCAT

The *iCAT* Impact Capacity and Assessment Tool (iCAT) is a free organizational assessment, planning and evaluation tool designed for intermediaries that strengthen nonprofits. It evaluates the strengths and weaknesses of individual organizations, generating a list of top organizational strengths and challenges.

Algorhtym is a US based organization that builds evaluation tools for nonprofits that support continuous improvement, community sharing and multi-level development.

The Impact Capacity Assessment Tool (iCAT) information sheet

The iCAT is an organizational assessment, planning and evaluation tool to help strengthen nonprofits.

**iCAT provides the following information:**

Capacity and Subcapacity Scores - The Capacity and Subcapacity Scores show the results on a scale of 1-100. An average nonprofit score is around 70.

iCAT survey responses are averaged, with each response receiving equal weight. In order to produce each subcapacity score, items within each subcapacity are weighted based on the body of capacity building research used to build the iCAT.

The subcapacities are then weighted to produce an Overall Capacity Building Score. This also provides the top strengths and weaknesses of the nonprofit within each capacity.

Organizational Capacity Stage - This covers your nonprofit's progress towards becoming an effective organization that has a sustainable and positive societal impact.

Each stage is made up of three components: Program, Growth, and Collective. Each of these components reflects performance across different subcapacities within an organization. iCAT measures performance within each of these components to determine their stage.
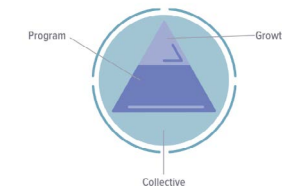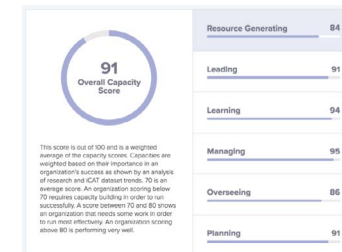
the**data**bank

2.1 United States

ALGORHYTHM

What it assesses

The tool assesses six key organizational capacities, each of which has sub-capacities:

- Learning is the capacity to collect, process and use information about its programs, operations and external environment for the purpose of furthering a mission.

- Leading is the capacity to articulate a clear vision for the organization and incentivise everyone to achieve it.

- Resource Generating is the capacity to raise the funds and other resources that it needs to operate, as well as the ability to incentivise others to support the organization in doing so.

- Planning measures ability to effectively make decisions and plan for the future.

- Managing is the ability to utilize human and financial resources in an efficient and effective manner.

- Overseeing is an organization's ability to hold itself accountable financially and for the achievement of its impact.

How the tool works

At each nonprofit organization, between three to twenty-five people participate in the online iCAT survey—some staff members and some board members, with no more than a third of the participants coming from the board. The assessment tool takes 20-30 minutes per participant to complete a series of questions on a scale of "Low" to "High" (with the ability to skip a question or answer "I Don't Know").

The iCAT report assists the intermediary organization and the nonprofits concerned in identifying strengths and areas needing improvement. It includes a score for each capacity on a 100-point scale, giving a series of detailed and prioritized recommendations, and a capacity building plan. It does this by comparing one organization with established research on others.

Summary

The authors were unable to access this tool directly and have based this overview on a *webinar about the tool*, as well as the tool website. The tool is currently aimed at intermediary organizations and is particularly relevant to consultants and funders.

THINK SOCIAL TECH | techsoup GLOBAL NETWORK

UK   English   Nonprofit

NCVO - Digital Maturity Assessment

NCVO's *Digital Maturity matrix* is a free diagnostic tool to help charities to explore how well they are taking advantage of all things digital. The tool was first developed in 2016 and was re-launched in 2020 based on in-depth user testing and review. NCVO has shared learning from 200 organizations in this *blog post*.

NCVO champions the UK voluntary sector and volunteering and is a membership body representing over 16,000 voluntary organizations, charities, community groups and social enterprises across England. They support members by developing practical resources designed to support the day-to-day running of their organizations, saving them time to focus on their beneficiaries.

What it assesses

This tool focuses on 8 areas; Leadership and Strategy; Technology; Service Design; Content; Communications; Data and Insight; Security and Data Protection.

There are 63 questions and each asks for a rating on a scale of 1 to 4 as to where you are now and where you want to be in future. It offers a visualization of the maturity score, present and ambitions, as well as the ability to save and return to this. It is designed to act as a reference to charities who want to develop their digital capacity.

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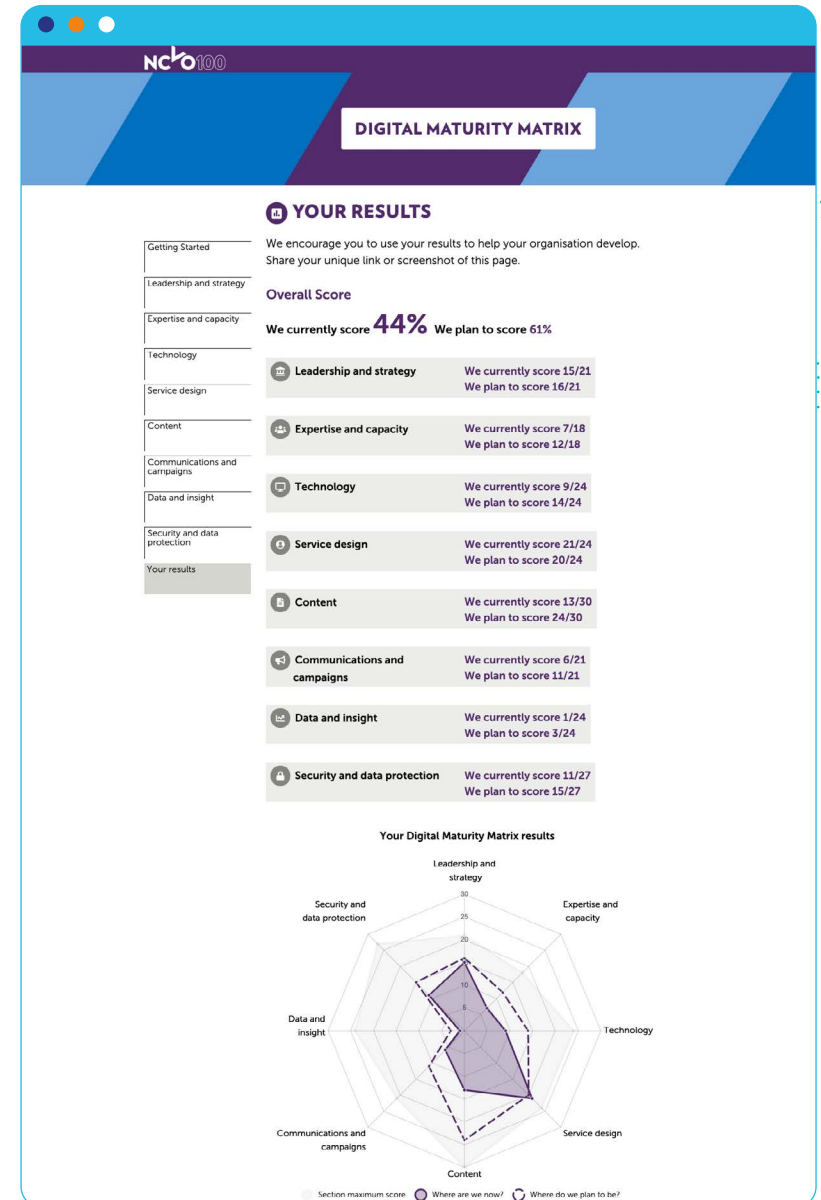
2.2 Europe

How the tool works

The tool contains eight groups of statements about best practice in different areas of digital. For each statement, you'll score your organization for how it's doing now and for how you're planning for it to be doing after your chosen time period (e.g. one year). You can choose from 'not started', 'some activity', 'some success' or 'highly effective' when describing current practice or ambitions. These categories represent numbers, which then show scores per section and overall. You can add notes to explain your answers if you need to.

You can sign up with an email in order to receive a unique link to review and amend responses later. Once the tool is completed you receive an overall percentage score and a breakdown of your scores against each area with a radar diagram showing these. The tool offers signposting which is useful but there is no real guidance to help you determine next steps. You are able to return to the tool and review progress in future.

Summary

This tool is user-friendly and easy to complete. It is unique in offering a comparison of where you are now and where you want to be, letting the organization decide which areas are priorities for change. The visualization is helpful and shows relative progress. The tool is holistic and covers key areas of digital transformation. It is also the only tool to focus in-depth on content. It focuses on organizational approaches and strategy, rather than specific tools or digital practice. The breadth of questions make it particularly helpful for mid-large organizations as well as those starting to make progress with digital transformation.

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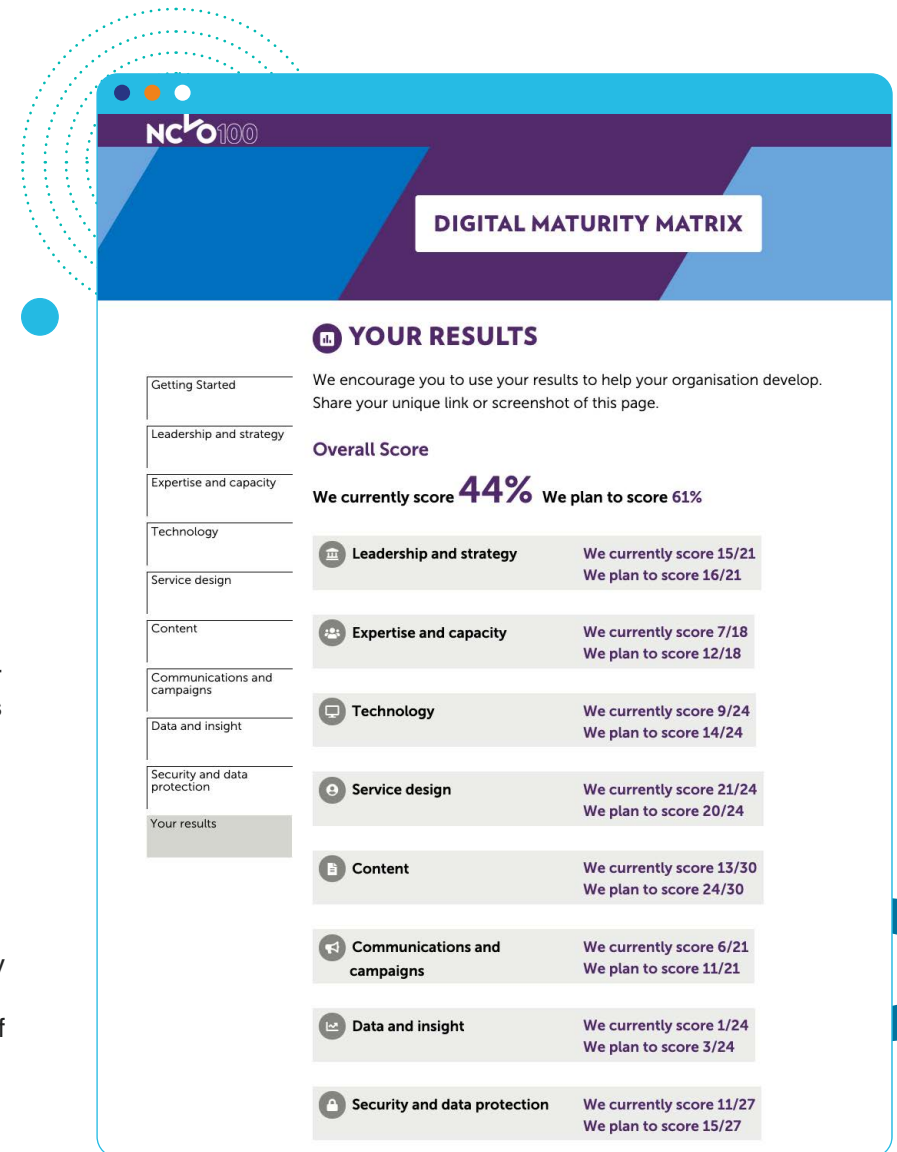
SCVO

Scotland   English   Nonprofit

SCVO Digital Checkup

SCVO's *Digital Check-up* enables nonprofit organizations to assess their current digital maturity and how this compares to other organizations. It is reviewed and updated annually in response to data analysis, feedback, sector developments and user testing. Over 400 organizations have used the tool since it launched in 2018.
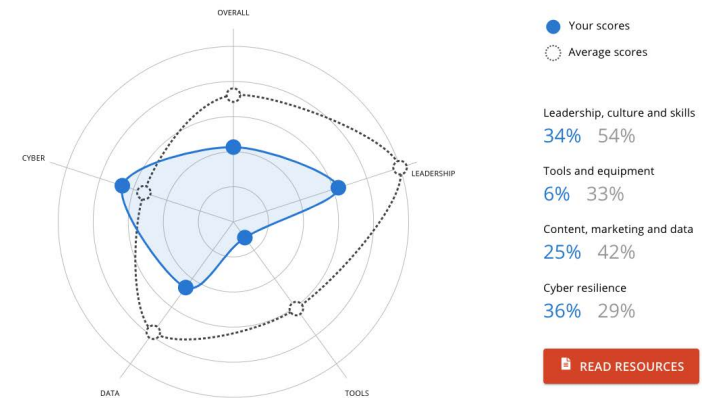
The Scottish Council for Voluntary Organizations (SCVO) is the national membership organization for the voluntary sector. Their mission is to support, promote and develop a confident, sustainable voluntary sector in Scotland. Members can access follow up support and advice from SCVO. The Digital Checkup is free and openly available.

What it assesses

The tool contains 18 questions and focuses on 5 areas: Leadership, Culture and skills; Tools and equipment; Content, Marketing and data, and Cyber resilience and online threats. The tool provides you with an overall score and a benchmark of your organization's scores versus the average scores of other organizations who have completed it (not a named level or stage of digital maturity).

Checkup results for Think Social Tech

Your overall score
23%

Average score
39% (compared with 58 organisations across the UK in the same income bracket)

● Your scores
○ Average scores

Leadership, culture and skills
34%   54%

Tools and equipment
6%   33%

Content, marketing and data
25%   42%

Cyber resilience
36%   29%

📄 READ RESOURCES

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2.2 Europe

SCVO

How the tool works

This tool is easy to access and does not require organizations to register. You are asked to provide a few basic questions about the focus of the organization in the last section (for the benchmarking).
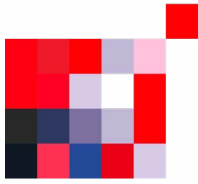
It comprises of 18 questions and offers a simple diagnostic survey. Each question is a multiple choice which you are required to complete before you move on to the next section. Upon completion, the tool provides an overall score, as well as an average benchmark score for other organizations across similar income brackets. These are visualized on a radar diagram. The tool offers extensive links to further information, according to the area specified as most interesting to you. It is also intended to be a starting point for a more detailed conversation with SCVO about your digital needs, which is free to member organizations.

Summary

This is a user-friendly and simple tool. The questions are accessible but require some knowledge of digital tools, terminology and policies in the organization. It focuses both on organizational approaches and strategy, as well as specific tools and digital practices. It has a strong focus on cybersecurity and data management.

FOCUS ON
Leadership, culture and skills
You scored 34% - the average is 54% for 58 other organisations across the UK in the same income bracket

Essential digital skills toolkit
SCVO
The Essential Digital Skills checklist allows you to measure your essential digital life skills and also includes an option to measure essential digital workplace skills alongside these.
READ MORE

Creating a Digitally Confident Third Sector in Scotland: Call to action 2 – What Next? (2018)
SCVO One Digital
This follow-up report reviews progress, providing practical examples of how organisations are adapting and evolving in our digital world.
READ MORE

Leadership in a digital age
Ellie Hale
Ellie Hale, digital fellowship and communities lead at CAST, talks about digital leadership.
READ MORE

Creating a Digitally Confident Third Sector in Scotland: Call to action 1 (2016)
SCVO One Digital
Scottish charity leaders call to action on what is needed to create a digitally confident third sector in Scotland.
READ MORE

What a digital organisation looks like
Janet Hughes, Doteveryone
Digital isn't a list of things to do. It's about how you think, how you behave, what you value, and what drives decisions in your organisation.
READ MORE

Do I need a digital trustee?
Janet Thorne
Recruiting a digital trustee can be a good way to bring expertise on to your board. But what kind of person do you need and what role would they play?
READ MORE

Charity Digital Toolkit: Digital leadership
Louise Macdonald & Simon Hopkins
Louise Macdonald OBE, CEO of Young Scot, and Simon Hopkins, CEO of Turn2Us share they've learned about digital leadership, from why charities need to do it, how they've developed their skills in this area and the risks as well as opportunities they've encountered along the way.
READ MORE

Overcoming resistance to organisational change
HyperIsland
A blog post on how understanding resistance can help you transform it into fuel for change.
READ MORE

Lloyds Business and Charity Digital Skills Index
Lloyds Bank
The largest measure of digital capability and skills for SMEs and charities in the UK
READ MORE

Good Things Foundation
Design and delivery of social inclusion and digital inclusion programmes through networks, training and resources.
READ MORE

The New Reality Report – Leadership
Julie Dodd
The New Reality's contributors make a clarion call for pioneering leadership to seize the opportunity to use digital transformation to drive a new era of social impact and to recognise that `business as usual' poses as much risk as creating space for experimentation and action.
READ MORE

3 steps to growing a digital culture in charities
NSPCC
Blog from the NSPCC Digital Team on 3 steps they're using to grow a Digital Culture.
READ MORE

The 7 digital skills every charity leader needs
Zoe Amar
Since leadership is key to charities moving ahead with digital, what skills should leaders develop? Here are Zoe Amar's top 7
READ MORE

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2.2 Europe

`UK` `English` `Nonprofit`

Digital Leadership Assessment

The *Digital Maturity Assessment* is a free diagnostic test for UK nonprofits to evaluate their organization across 15 digital competencies, gaining a digital maturity score and further advice to build on this. The tool was revised and updated in 2020.

Digital Leadership Ltd is a UK based consultancy, established by Brani Milosevic, helping nonprofits harness the power of digital so they can be more efficient and effective. The tool is based on experience of working with numerous charities to assess and develop digital maturity.
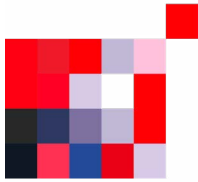
What is assesses

This tool focuses on 15 competencies outlined in their *Digital Maturity Framework*. These are: Culture; Leadership; Budget; Innovation; Capacity; Recruitment; Learning; Project Management; Technology; Data; Reporting; Insight; Communications; Service Delivery; and Internal Systems. The *framework* also describes five levels of maturity for each of these competencies.

These are divided into four key question areas relating to: Attitudes and foundations; People, skills and processes; Systems and information; Outputs and experiences.

Digital maturity: your results

Think Social Tech digital maturity

Overall, your digital maturity, on a 1-5 scale, is at **level 3**.

We've emailed your results to the address you gave us (please check your spam folder if you can't see it).

Growing

The attitude of Think Social Tech to digital can be characterised as "growing".

Think Social Tech is actively using digital to be more efficient and effective. It's not yet baked in to everything, but there's an organisation-wide understanding that digital is crucial to operations, culture and the experience people have when they interact with you.

Digital staff at Think Social Tech are supported and encouraged. Resources for digital don't always match up with ambitions. This means digital people, systems and processes are sometimes under strain.

It's an exciting time – there are opportunities to take advantage of. Streamlining and enhancing what you're doing will improve efficiency, effectiveness and happiness.

53%

Your digital maturity

This is your overall Digital Maturity score expressed as a Digital Maturity score of everyone who's taken the assessment is 54%.

Level 1 0-29% | Level 2 30-49% | Level 3 50-69% | Level 4 70-89% | Level 5 90-100%

Your digital maturity by area

These scores break your overall score down into broad areas of digital maturity.

Attitudes and foundations **60%**

People, skills and processes **50%**

Systems and information **50%**

Outputs and experiences **53%**

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2.2   Europe

How the tool works

The site advises that the tool works best when it's completed by Digital Leads and their colleagues to capture different perspectives in the organization. You are required to complete some basic information including contact details, the type and size of organization you are before you are able to access the tool. These details help provide benchmark data.

There are 15 questions, one for each of the 15 competencies. Each presents 5 statements to select from, connected to different indicators of digital maturity which underpin the tool. They are evaluated on a scale of 1 to 5 to produce a digital maturity score.

On completion you receive an immediate summary of your results giving overall scores and details about the stage of maturity, as well as scores for each competency in a visualization. You can sign up to receive additional tips via email, which contains recommended next steps. You will also be sent an email with a link to the results.

Summary

This is by far one of the most comprehensive digital maturity frameworks with clear indicators of progress at each stage, showing what is expected for a digitally mature organization. It is also simple to complete and user friendly. The questions lend themselves to be used by nonprofits with existing digital capacity and are particularly relevant to medium and large organizations. It does not cover risks (such as cybersecurity and data protection policies) which other tools do.

Think Social Tech digital competencies

The key aspects of the organisation's digital maturity.

Attitudes and foundations

Culture
Level 3: The organisation understands the value of digital and wants to learn more.

Leadership
Level 3: The digital lead is encouraged to be strategic, when time allows.

Budget
Level 3: The budget allows for the testing of new ideas in priority areas.

Innovation
Level 3: There is innovative re-imagining of some aspects of products or services.

People, skills and processes

Capacity
Level 3: There's a central team of digital specialists, with some digital delivery in other teams.

Recruitment
Level 3: Broad digital skills are required for jobs all around the organisation.

Learning
Level 2: There's a small budget for basic digital skills in digital expert roles.

Project management
Level 2: Some common project management principles are used.

Systems and information

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2.2   Europe

`UK` `English` `Business`

Arrk

The *Arrk tool* by Arrk Group is designed to help companies and for profit organizations to understand how digitally mature their company currently is with a business digital health check. It was created in 2017.

Arrk Group is a UK-based full-stack, global technology services consultancy. Their services range from consultancy to ownership of complex digital platforms and infrastructures across a broad spectrum of industry sectors, from start-ups to multinational enterprises.

What it assesses

The tool focuses on the 5 areas of digital maturity: Leadership and Strategy; Execution and Delivery; Customer Experience; Organization and Culture; Technology and Platform.

The Arrk tool scores place the organization in one of their five defined stages of digital transformation. These are named after animals which include: Digital Dinosaur; Digital Tortoise; Digital Panda; Digital Tiger; and Digital Eagle.

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How the tool works

This diagnostic tool does not require you to register to use the tool and takes you through 13 questions across the 5 areas to assess. It takes under 10 minutes to complete. Upon completion you receive an immediate report with a summary of your results giving a digital stage of maturity your organization has achieved and a picture of the animal it relates to, as well as some general recommendations to move forward. This will be emailed to you if you register.

Summary

This tool is not designed for nonprofit organizations but will be relevant to those interested in developing their digital culture, leadership and systems. It does not cover digital skills in-house, communications, marketing and developing an online presence, which other tools of this nature do. Tools specifically designed for nonprofits may also have a stronger focus on data collection from services. The tool outputs are designed to lead-in to consultancy services but they do provide high level engaging and memorable feedback.

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UK   English   Nonprofit

Data Orchard Data Maturity Framework

The Data Orchard *Data Maturity Framework* and *Self-Assessment Tool* are designed to help not-for-profit organizations to self assess where they are on a data maturity journey, benchmark against others in the sector, and identify areas for improvement. The tool is based on *research and development* with over 200 UK-based charities and social enterprises. The tool launched online in 2019 and was redesigned in 2021. *Data Orchard* is a UK Community Interest Company and Social Enterprise helping nonprofit and public sector organizations use data for better decisions and greater impact.

What it assesses

The framework adopts a broad definition of data, covering all the types of information an organization collects, stores, analyzes, and uses. The framework identifies five stages of maturity (Unaware, Emerging, Learning, Developing and Mastering) and seven key themes (Uses, Analysis, Data, Tools, Leadership, Culture and Skills). Full details of these are given in their *Data Maturity Framework*. Data Orchard's *tools, framework and research reports* are free to download and use under a Creative Commons Licence.

THINK SOCIAL TECH | techsoup GLOBAL NETWORK
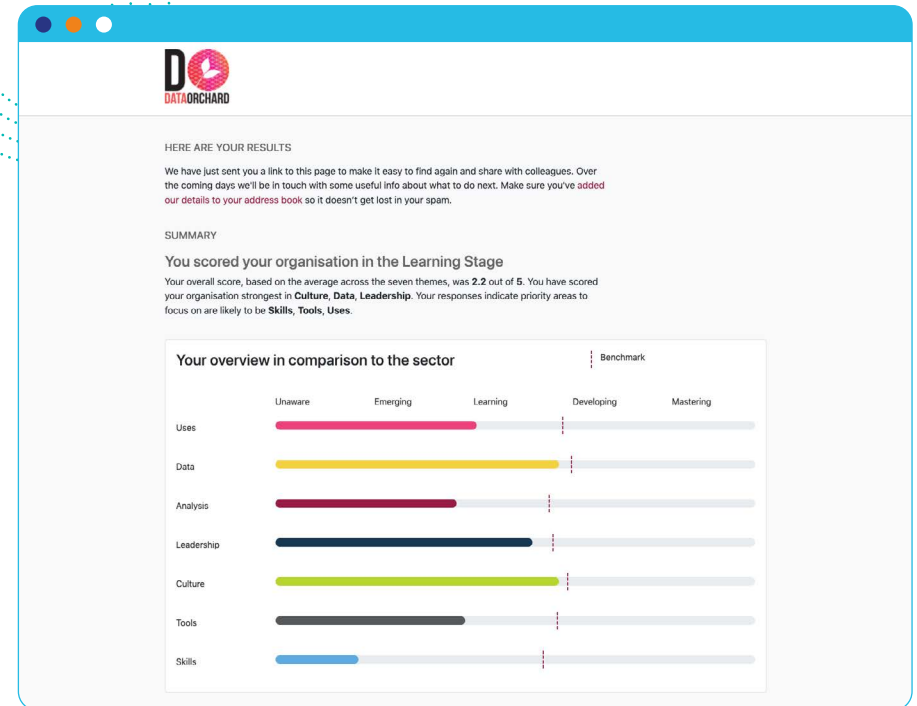
How the tool works

The free tool includes two options for completion. A short 5 minute taster version gives a rough indication of data maturity. The full 20 minute version indicates strengths and weaknesses across seven themes, enables comparison with a benchmark and identifies next stages to work towards. You first have to register by providing basic contact details and simple details about your organization. A series of questions ask the user to rate various data capabilities on an 'extent' or 'agreement' range (with the option for 'Don't know' and 'not applicable').
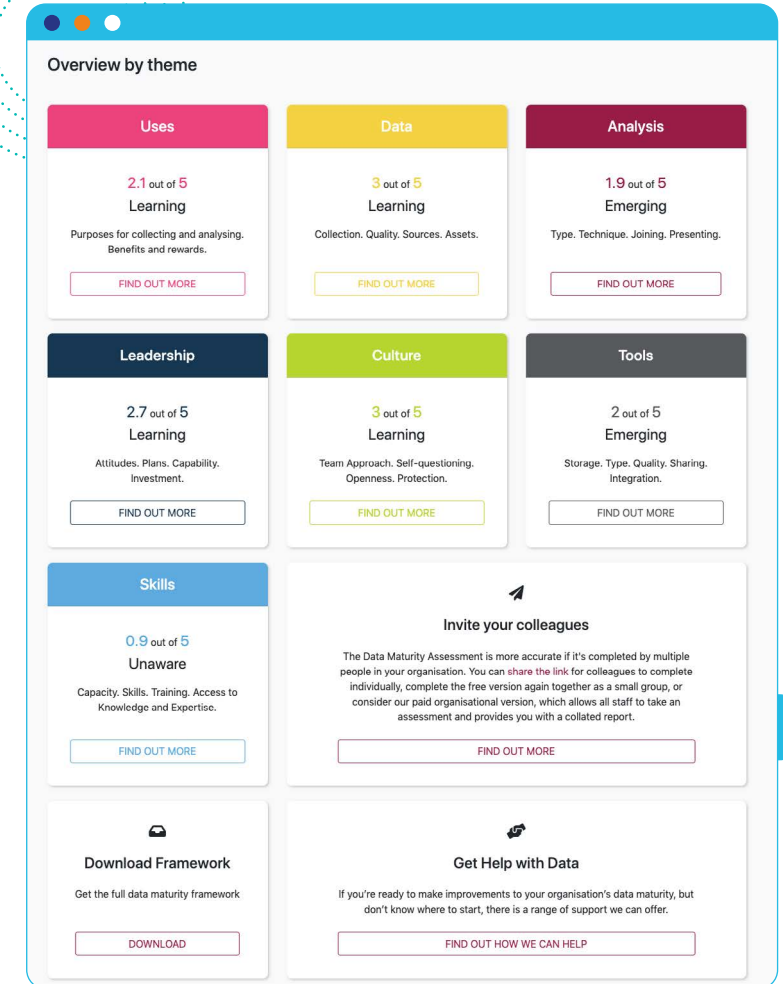
Once completed you receive a summary report (also emailed to you) with your overall level of data maturity, as well as a breakdown across the seven themes. This includes a visual representation of strengths and weaknesses, as well as an outline of the current level and the next level you are aiming for. It also shows how this compares against the sector average.

The tool is really aimed at engaging multiple people in an organization. For larger organizations there are paid options, costing from £499 (for an organization with an annual turnover of less than £100k) to £4999 (for an organization with an annual turnover of more than £10 million). These enable organizations to customize their assessment with their own logo and additional questions, invite unlimited numbers of staff to participate, and give access to a dashboard report with combined organization results. Agencies and intermediaries can also use this tool with multiple organizations, individually or as cohorts.

Summary

Whilst this framework is not about digital transformation, the two areas often go hand in hand and this tool offers a holistic view of data capabilities across an organization. The framework is evidence-based, user friendly and offers a range of options for completion, making it worth exploring for those interested in data. It is ideal for small organizations, as well as larger ones.

THINK SOCIAL TECH | techsoup GLOBAL NETWORK

2.2 Europe

SKILL IT
digital pathways for youth work

Ireland   English   Nonprofit

SKILL IT - Digital Readiness Assessment

The *SKILL IT* free self assessment tool is designed to assess the digital readiness of youth organizations, non-formal educational organizations and NGOs.

The *Skill IT for Youth project* is a European initiative aiming to increase the quality of youth work, combining higher levels of excellence and attractiveness in services, obtained through the digitalisation of youth work, with increased opportunities for young people.

What the tool assesses

The survey is split into two parts, covering most aspects of how an organization is run:

- **Part 1:** Leadership and management of the organization covers: Strategy; Governance and Operations; Infrastructure; Human Resources (HR); and Communication and Collaboration

- **Part 2:** Practice and provision of services to young people covers: Planning; Practice and Service Delivery; Progression and Youth Outcomes; Monitoring and Assessment; and Policies and Procedures

The standards in the tool are taken from the Irish *National Quality Standards Framework* (NQSF) for youth work and the *European Framework for Digitally-Competent Educational organisations* (DigCompOrg). Each area is given a score according to 5 stages of digital maturity: Absent; Initial; Effective; Highly Effective and Mature.
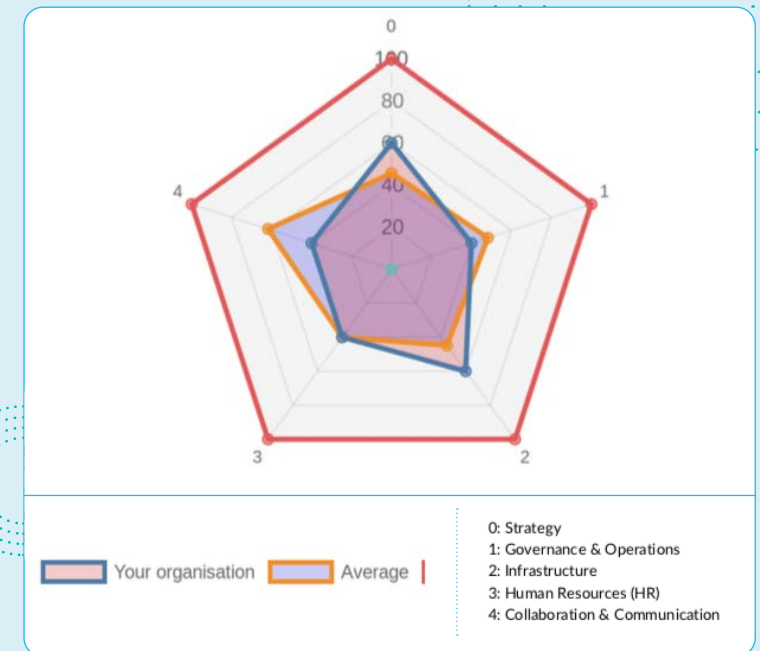
Your organisation   Average

0: Strategy
1: Governance & Operations
2: Infrastructure
3: Human Resources (HR)
4: Collaboration & Communication

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SKILL IT
digital pathways for youth work

How the tool works

This tool is easy to access and does not require organizations to register. There are two parts to the survey, each with 5 areas to assess and a clear break between them. Each area has an introduction and presents 5 statements to select from, connected to different indicators of digital maturity which underpin the tool. The user must pick one in order to proceed. Upon completion of part 1 and again in part 2, the user is emailed a report (and can download this). The report gives the scores for each area of the assessment with detailed feedback, as well as a short recommendation and suggested progression over the next 2 - 3 years. This is intended to lead the organization to create a *'Digital Learning Plan'* and offers additional guidelines and templates to move forwards.

Summary

This tool is designed for youth work organizations but is particularly relevant to all organizations putting young people at the heart of what they do. The tool is accessible, user friendly and simple to complete (although it can take time to review and choose between all the statements). It is noteworthy in its holistic approach and has a strong focus on user centered service design with young people. It is also one of the few tools to highlight the need to explore digital inclusion, training and support for both staff and young people involved in services.

SKILL IT
PDF REPORT SELF ASSESSMENT
Leadership & Management of Organisations

Category:	Strategy
Score:	3 out of 5
Level:	Effective

SHORT TERM RECOMMENDATION

Board and senior management team have successfully embedded digital technology within the organisational strategy, a dedicated digital implementation person/team is assigned to lead on the delivery to the plan with clearly defined roles and measureable objectives. The leadership team should actively promote and support all stakeholders to help the digital implementation person/team to grow the digital capacity of the organisation.

SUGGESTED PROGRESSION OVER THE NEXT 2-3 YEARS

Board and senior management team should develop a continuous improvement process of planning, doing, reviewing and acting on findings. This would include impact measurement of activities to date, examination of relevant developments and research in the educational technology field and how this can be integrated into the next phase of the plan to ensure the best quality service is provided to young people.

Board and senior management team should continue to strategically plan the next cycle of technology integration across the organisation to ensure the sustainability and build on the momentum of the cultural change within the organisation. Also contribute expertise at sectoral level to affect systemic change both nationally and internationally.

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SCHOOL OF BUSINESS AND SOCIAL SCIENCES
AARHUS UNIVERSITY

AARHUS
BSS

`Denmark` `English` `Business`

University of Aarhus Digital Maturity Assessment Tool (DMAT)

The *Digital Maturity Assessment Tool* (DMAT) allows private and public organizations across different industries, sizes and geography to map their digital maturity and the digital development areas they need to consider. It is free to use and accessible to all organizations, under the copyright of Annabeth Aagaard. It was redesigned in December 2021. The tool is based on extensive research and developed at the *Interdisciplinary Centre for Digital Business Development, University of Aarhus*. They promote interdisciplinary international research on applying cutting-edge digital technologies in connection with business development in an agile and sustainable way.

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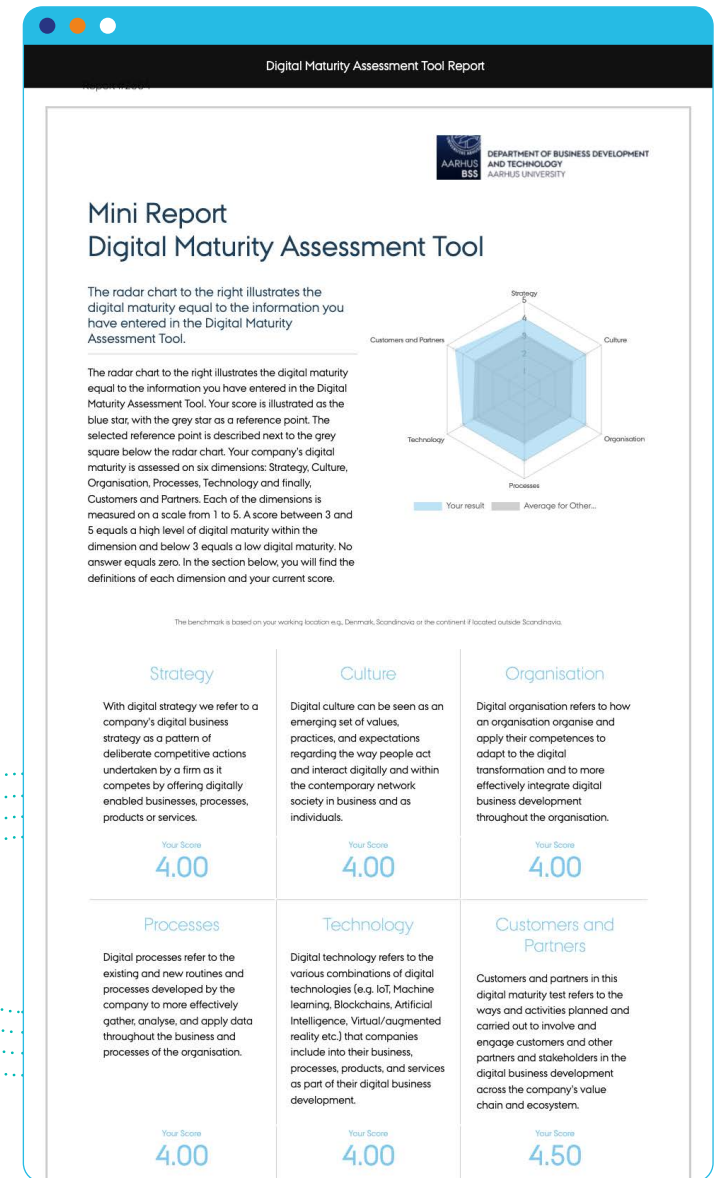
SCHOOL OF BUSINESS AND SOCIAL SCIENCES
AARHUS UNIVERSITY

What it assesses

The DMAT tool assesses organisations against six dimensions of digital maturity:

- **Strategy:** A pattern of deliberative competitive actions undertaken by a firm as it competes by offering digitally enabled processes, products or services.

- **Culture:** An emerging set of values, practices and expectations regarding the way people act and interact digitally in society, business and as individuals.

- **Organization:** How organizations adapt to digital transformation and effectively integrate digital business development throughout the organization

- **Processes:** To more effectively gather, analyze and apply data throughout the business and processes of the organization.

- **Technology:** The various combinations of technologies (e.g. Machine Learning, IoT) included as part of digital business development.

- **Customers and partners:** The ways customers and other stakeholders are involved and engaged in digital business development.

How the tool works

The DMAT tool is an online survey with 35 questions to rate on a scale from 'strongly agree' to 'strongly disagree'. The assessment takes 15 minutes to complete. Upon completion a report opens in the browser window. This provides a radar diagram to visualize your organization's digital maturity across the six dimensions. It also provides your results benchmarked against the sector average and provides insights about how to progress with digital transformation.

Summary

Although this tool is designed for companies and profit making organizations, it still feels very relevant to nonprofit organizations and covers many similar areas of digital maturity to other tools. The questions are accessible and easy to answer, making it applicable to organizations of any size. It has a strong focus on leadership, strategy, culture, skills and data. It will be less relevant to those wanting to assess their internal systems, risks, cybersecurity, marketing and communications.

Impact of Results

This section describes the known characteristics and impacts of having either a high or low maturity level on each variable. The characteristics will be less pronounced the closer the score is to the mean of 3. The results of the test are based on your answers for the questions posed in the digital maturity test, and the report generated from these answers is captured in a generic feedback on the six dimensions of digital maturity as stated below.

Your digital maturity test scores high/medium on digital strategy

A high/medium score on digital strategy indicates that your company has worked on formulating a strategy for your digitalisation and use of digital technologies. You should apply your digital strategy as a guide for the activities you set in motion and make sure that the digital strategy is implemented and integrated throughout your internal as well as external organisation to be able capture the full business and development potential. Make sure that you also support a strong digital culture and organisation to have the proper platform and resources for the digital endeavours you have planned in your digital strategy.

Your digital maturity test scores high/medium on digital culture

A high/medium score on digital culture emphasises that your company has worked on growing an organisational culture prone to digitalisation and the use of digital technologies throughout the company's processes and routines. To get the optimal business effects of a high digital culture, you should build on a digital strategy and emphasise developing your digital processes and routines as well as your digital organisation to make sure that you have the proper resources, structures and processes to materialise the digital development and business potentials of your organisation.

Your digital maturity test scores high/medium on digital organisation

A high/medium score on digital organisation reveals that your company has worked on building an organisation with the necessary digital competences and structures to be able to harvest the digital development your organisation may pursue. To ensure the full business potential of your company's digital development, make sure to build a strong digital culture and digital processes and implement a clear digital strategy to support the results of your digital organisation.

Your digital maturity test scores high/medium on digital processes

A high/medium score on digital processes indicates that your company has worked on developing the digital processes and routines throughout your organisation. Making use of digital technologies in your processes requires a strategic objective and a digital culture and digital organisation to back it up for further developments. Thus, a digital strategy helping to prioritise how to further develop your internal and external processes digitally is key. Also, a strong digital culture combined with close digital collaboration with your customers and partners can help leverage the business potentials of your digital development.

Your digital maturity test scores high/medium on digital technology

A high/medium score on digital technologies suggests that your company has worked with digital technologies in a number of contexts. Digital business development requires an optimal prioritisation and use of selected digital technologies to be applied in your business processes and routines. It is therefore vital that your organisation has a clear digital strategy to guide the investments, prioritisation and integration of selected digital technologies in developing your digital business and that you use the digital technologies to build effective digital processes and strong and digital collaborations and processes with your customers and partners to harvest the full business potentials of your use of digital technologies.

Your digital maturity test scores high/medium on customers and partners

A high/medium score on customers and partners indicates that your company has worked on engaging your customers and other partners and stakeholders in your digitalisation. Although it is suggested to carry out digital transformation in the internal organisation first, the full business and development potentials of digital business development can only be reached through inclusion and interconnectivity of your value chain and your customers Digital Maturity Assessment Tool copyright Associate professor, PhD Annabeth Aagaard, Aarhus University and partners. This also requires a clear digital strategy, good digital processes and digital organisation to provide the right prioritisation of joint initiatives, effective joint/interconnected digital processes for the collaboration to work effectively and a strong digital organisation to provide the necessary competences for the further and joint digital development.

Concluding Remarks

Digital technologies are transforming business strategies, business processes, firm capabilities, products and services and key interfirm relationships in extended business networks (Bharadwaj et al., 2013). Through the use of digital technologies, viewed as combinations of information, computing, communication and connectivity technologies, new and existing businesses can transform and identify, create and capture value in totally new ways.

THINK SOCIAL TECH | **techsoup** GLOBAL NETWORK

SOCIALware

Belgium   French, Dutsch   Nonprofit

SOCIALware

The *SOCIALware* tool is a free survey designed to help nonprofit Associations to understand whether they have the key digital basics in place. It is available in French and Dutch. SOCIALware is a nonprofit organization operating in *Belgium*, *Luxembourg* and the *Netherlands* which aims to equip associations with the technology they need to achieve their mission. They are part of the TechSoup Global network. The tool can help organizations to identify whether any of the free (or low cost) software or support that SOCIALware offers might be relevant to them.

What it assesses

This tool focuses on three areas: Online presence, internal tools and communications, security. The tool assumes if your response is 'yes' to a question outlined that your digital capacity against this question is in good shape.

- Online presence: brand identity, website, social media, mailing lists
- Internal tools for communication, project management, CRM
- Security (GDPR, antivirus software, password protection)

How the tool works

The tool is a typeform survey which requires you to register with your email address. There are 17 simple yes/no questions under three areas to answer which take 5 minutes to complete. Upon completion of the survey, no analysis is given and there is a notice that the report will be emailed to you (the authors did not receive this). The tool automatically sends an email with signposts to the SOCIALware website and links to free software, blogs and advice they provide.

Summary

This tool is brief and the questions are simple and easy to complete. The questions are quite specific, narrow and quite practical. The tool specifically covers communications, risks and internal systems. This tool is designed for smaller charities. No follow up report was received by the authors and the tool may not be working correctly at the time of writing.

THINK SOCIAL TECH | techsoup GLOBAL NETWORK

`Spain` `Spanish` `Social economy`

Asata Digital Maturity Test

Asata's Digital Maturity Test is a free tool aimed at Social Economy companies and third sector organizations in Spain.

Asata advises and supports Social Economy companies. This tool is part of a broader project, the "Improvement of digital competitiveness" subsidized by the European Social Fund through the managing body CEPES.

What it assesses

This online self-diagnosis tool is part of ASATA's Digital Transformation project and will allow you to know your level of digital maturity in four areas:

- **Digital culture:** is there a digital conscience in your company? Are digital strategies implemented with a long-term vision?

- **Customer experience:** Do you really know the needs and opportunities in your market? And the preferences of your customers? Have you defined strategies to improve their experience?

- **Technology and equipment:** Do you use technology in the best way to take advantage of your business? Do your computers have the necessary updates for optimal performance?

- **Communication and positioning:** Do you know the communication that is established in your organization? Are you communicating the information to your employees correctly? Are you reaching your customers in the best possible way?

2.2   Europe

ASATA ECONOMÍA SOCIAL ASTURIAS

How the tool works

There is a simple signup process for the tool (name, email, phone). The tool consists of
 25 simple questions, asking what tools the organization has, as well as some processes and
systems in place. At the end of the test you submit the survey and you are presented with an
overall stage of digital maturity (low, medium and high). You can then request for the information
to be sent to you. A personal email is sent after the test, which invites you to a face-to-face
visit for digital diagnosis, issuing a report resulting from the advice. This is followed by further
support sessions and a final report on the improvement at the end.

Summary

This tool is most relevant to social economy organizations in Spain, with a particular interest in
developing their digital culture, technology, communications and security. It is accessible to those
at the very early stages of digital transformation and to small organizations. It is easy to complete
with limited technical knowledge and is user friendly. There are no visualizations or detailed
strengths and weaknesses outlined at first, but the tool links into a carefully designed package of
free support.

THINK SOCIAL TECH | **techsoup** GLOBAL NETWORK

2.2   Europe

France   French   Social economy

Uniformation digital self-diagnosis questionnaire

The *Uniformation digital self-diagnosis questionnaire* is a free tool designed to support Associations, cooperatives, mutual societies, or foundations in France to understand their digital maturity and identify areas for improvement. You need to be a member and based in France to access the tool results.

Uniformation is a membership organization in France for organizations with less than 50 employees. They are developing local services and support to improve employee information and access to vocational training, particularly with regard to economic and technical changes in the various sectors of the industry.

This tool is funded under the Skills Investment Plan and benefits from the expertise of the *ministry in charge of labor*, within the framework of the *EDEC for the social and solidarity economy sector*.

THINK SOCIAL TECH   techsoup GLOBAL NETWORK

2.2   Europe

uniformation

What the tool assesses

The tool explores 3 themes for the organization: Digital culture; projects and relationships with partners; and internal organization working conditions. Questions cover the following topics:

- Internet presence
- Digital equipment
- Protection of equipment and data
- Support for employees
- Internal organisation and working conditions
- Relations with partners
- Development of projects

How it works

The tool asks 30 compulsory questions (plus 5 additional questions if you answer 'yes' to some of these), each with 4 simple responses to select from. At the end of the online questionnaire, the user has to register information about their organization and sign in. A summary page displays a score out of 10 (based on an overall average of the scores) with the indication of where digital improvement is needed.

Summary

This tool is most relevant to members of Uniformation in France. It best suits those interested in their internal culture and systems. The researcher was not able to access the tool results, because they are reserved for members of Uniformation. Information about the test was discovered on the France NUM portal for Digital Transformation, in an article about *digital self diagnostic tools*. For those interested in the tool, the questions were accessible to those with limited technical knowledge. The tool may have some glitches. During the testing process, the questions were not loading fully and registering as incomplete, making it hard to complete and submit.

THINK SOCIAL TECH | **techsoup** GLOBAL NETWORK

2.2 Europe

France | French | Nonprofit

Solidatech

Solidatech offers a free *digital self-diagnostic tool* in French dedicated to associations and designed to assess progress on digital issues and identify areas for improvement. A report about the tool can be found *here* (in French).

Solidatech in France is a digital solidarity program dedicated to associations, endowment funds, foundations recognized as being of public benefit, and French public libraries. Their mission is to help nonprofit organizations to strengthen their impact through the use of digital technology. They are a TechSoup Global partner.

What it assesses

This tool is designed to help organisations better understand their digital capabilities and focuses on *7 pillars of digital maturity* (translated from the *Solidatech 2020 report*).

- Animate your network: Work collaboratively and communicate internally.

- Gain visibility on the web: Grow your online presence and brand to raise awareness of your association and causes.

- Work collaboratively: Provide staff with access to shared documents, space and work tools wherever they are, giving them the ability to work as a team.

- Finance your project: Take opportunities to optimize fundraising, mobilize new funders or develop new sources of income.

- Manage your human and financial resources: Use tools to support, manage or train teams, employees or volunteers, or to make financial projections.

- Secure your association and follow the regulations: Protecting the organization against the misuse of personal data and cyberattack.

- Drive your digital strategy: Anticipating, monitoring and establishing new tools and ways of working in the organization.

THINK SOCIAL TECH | techsoup GLOBAL NETWORK

2.2   Europe

Solidatech

How the tool works

This tool is easy to access and does not require organizations to register. It includes 63 questions (between 7 and 12 for each pillar of digital maturity) asking whether the tool, technology or capability exists (for instance 'No I don't think we need it', 'no', 'yes, it's in progress', 'yes' and 'I don't know'). Once completed, the tool provides a radar diagram visualizing digital maturity strengths and weaknesses for the Association. It shows where there are areas to improve. A set of recommended resources are given and tailored to the results, including tools, tutorials and articles from their *Resource Center*. This can be downloaded as a PDF report.

Summary

The tool is designed for French Associations. It mainly covers the practical use of tools within an organization to improve communications, marketing, fundraising, operations, internal collaboration and ways of working. It is accessible and intuitive to use and links to a range of tailored recommendations and resources. As such, it is particularly well suited to small Associations and those who are at an early stage with exploring the use of digital in their organizations.

NOTRE PROGRAMME

Solidatech a pour objectif de renforcer l'impact des organisations à but non lucratif par le numérique, en France à travers la plateforme solidatech.fr.

Depuis 2008, ce programme de solidarité numérique est porté par les **Ateliers du Bocage** (ADB), entreprise d'insertion du mouvement **Emmaüs** en partenariat avec le réseau international **TechSoup** qui a créé le concept, aujourd'hui déployé dans plus de 180 pays.

NOS 3 MODES D'ACTION

1 Favoriser l'accès aux outils numériques des associations.

2 Accompagner les associations dans le développement de leurs usages numériques.

3 Mettre le numérique au service du bien commun.

SOLIDATECH, CE SONT :

33 000 organisations inscrites gratuitement

430 000 outils numériques distribués

140 millions d'euros d'économies pour les associations

Chiffres à fin décembre 2019

QUI SONT LES BÉNÉFICIAIRES ?

Associations loi 1901   Fonds de dotation   Fondations reconnues d'utilité publique   Bibliothèques publiques

THINK SOCIAL TECH | techsoup GLOBAL NETWORK

nodoká
by MAKAIA

www.nodoka.co

Latin America and the Caribbean   Spanish   Nonprofit

Nodo Ká Digital Transformation Model

Nodo Ká's *Digital Transformation Model* is a free assessment to help social purpose organizations in Latin America and the Caribbean to understand and assess their current digital state, leadership capacity and level of digital integration as an organization. It is available in Spanish and English.

Nodo Ká is based in Colombia and exists to provide a platform for the exchange of resources, knowledge and information to the social sector in Latin America and the Caribbean. It was developed by *Makaia* which aims to improve the lives of people and communities, as well as the capacity of social organizations through the use and appropriation of technology, content and digital applications. Makaia manages this platform and is part of the TechSoup global network, working towards bringing the best technology to the social sector.

What it assesses

The Digital Transformation Model comprises 30 questions across five areas:

● Vision and Strategy

● Organizational Culture

● Operations

● Marketing and Communications

● Infrastructure

Overall, the tool provides an assessment of the organization's digital development, described as: nascent; conservative; trend follower; and digital state.

nodoká — Digital Transformation Model

WELCOME TO DIGITAL TRANSFORMATION!

Digital transformation is the integration of digital technology in all the areas of an organization, fundamentally changing the way to generate value and impact to the beneficiaries. It fosters a deep integration of strategy, people and processes, based on the effective use of technology.

Investing in digital transformation models, allow organizations to have a strategy based on improving the value proposition and the impact of the beneficiaries, make decisions through the analysis of data and systematized information, be more open to change and continuous learning, be agile in their processes, fluid, adaptive, scalable and sustainable.

The following evaluation model, gives organizations a path to know and evaluate the actual state, giving recommendations on their way to be prepared for the next level of their digital transformation. It defines the state of the organization in relation to their leadership capacity and the level of digital integration, placing them in four levels: nascent, trend follower, conservative and digital. This analysis is carried out through a survey of 30 questions where five areas of the organization are analyzed: (1) mission and strategy, (2) organizational culture, (3) operations, (4) communications and marketing and (5) infrastructure, evaluating for each area at what level of development it is: incipient, basic, explorer or innovator.

Below is a brief example of how you can visualize the results of this model.

If you are already registered in Nodo Ká, we invite you to login with your username and password. If you are not yet a user, we invite you to register to continue.

thinksocialtech@gmail.com

LOGIN

Forgot Password

ARE YOU REGISTER?

REGISTER

DIGITAL TRANSFORMATION LEVEL

Level of digital transformation | Trend follower | Digital
● 02/04/2019
Nascent | Conservative
Leadership capacity

MAKAIA

INNOVATION FOR CHANGE

If you have any questions about the use of this platform, please write to contáctenos.

RESULTS BY AREA

VISION AND STRATEGY   ORGANIZATIONAL CULTURE   OPERATION

MARKETING AND COMMUNICATION   INFRAESTRUCTURE

THINK SOCIAL TECH | techsoup GLOBAL NETWORK

2.3   Central and South America

www.nodoka.co

How the tool works

Organizations are required to register and provide evidence of their existence in order to use the tool. Once registered you can access and complete 30 questions. Each question presents a set of statements to select from, relating to a level of digital capability (described as incipient, basic, explorer and innovative). Once you have successfully completed the survey, the tool produces a report and gives an overall stage of digital maturity. It gives guidance to improve digital capabilities and provides recommendations as to how the organization can move forwards with digital transformation. The tool also gives access to an interactive benchmarking dashboard. This allows you to see collective results from the tool, which can be filtered by country, state, city, theme and organization type.

Summary

The survey questions are relatively simple to answer with limited technical knowledge. This light touch approach will appeal to small organizations and those who are at an early stage with digital capabilities. It will be particularly useful for organizations with Spanish speaking staff and it has been designed for social purpose organizations based in Latin America and the Caribbean. It is also available in English and will have much wider applicability.

Below, you can see general results of all the organizations that have completed the evaluation. Using the filters presented on the left, you will be able to have the information of the general panorama and of each one of the five areas evaluated, according to the level of digital transformation. Global information can be downloaded for more detailed studies. If you are an organization, you can see your position on the big picture chart, with a different color.

INFORMATION FILTERS

Select country

Select state

Select city

Select theme

Select type of organization

Social Organization / CSO / NGO

Download pdf   Download in CSV

JS chart by amCharts

Seguidora de tendencias   Digital

Nivel de Integración Digital

Naciente   Conservadora

Capacidad de liderazgo

VISION AND STRATEGY

JS chart by amCharts

Innovador 13.26%
Explorador 27.38%
Incipiente 20.75%
Básico 38.62%

ORGANIZATIONAL CULTURE

JS chart by amCharts

Innovador 4.61%
Explorador 17.87%
Incipiente 44.09%
Básico 33.43%

OPERATION

JS chart by amCharts

Innovador 9.51%
Explorador 23.63%
Incipiente 28.53%

MARKETING AND COMMUNICATIONS

JS chart by amCharts

Innovador 16.14%
Explorador 32.28%
Incipiente 14.70%

THINK SOCIAL TECH | techsoup GLOBAL NETWORK

⟿ safaritec

Latin America and the Caribbean ⎹ Spanish ⎹ Nonprofit

Safaritec

The *Safaritec* tool is a free game that supports social initiatives to take the next step in digital marketing, databases and remote working. Safaritec has recently been significantly reviewed and updated, with more questions and resources. The materials are refreshed year to year.

It was developed by *Wingu* is a nonprofit civic tech organization working in Latin America, with offices in Argentina, Columbia and Mexico. Their mission is to enhance the impact of social projects and initiatives by promoting their digital transformation and implementation of innovative technological developments. The tool is based on the Q&A customizable platform RUPU, also developed by Wingu. It can be personalized and applied to any type of Q&A organizations may need.

What it assesses

This tool focuses on 3 areas of digital transformation:

- **Digital Marketing:** Content Marketing, SEO, SEM, Google Ad Grants, Email Marketing, Social Networks and Web analytics.

- **Data:** Managing contacts and donors, collecting impact metrics and indicators, fundraising strategies and finding funding sources.

- **Remote work:** Emails, meeting online, sharing calendars and documents.

THINK SOCIAL TECH ⎹ techsoup GLOBAL NETWORK

safaritec
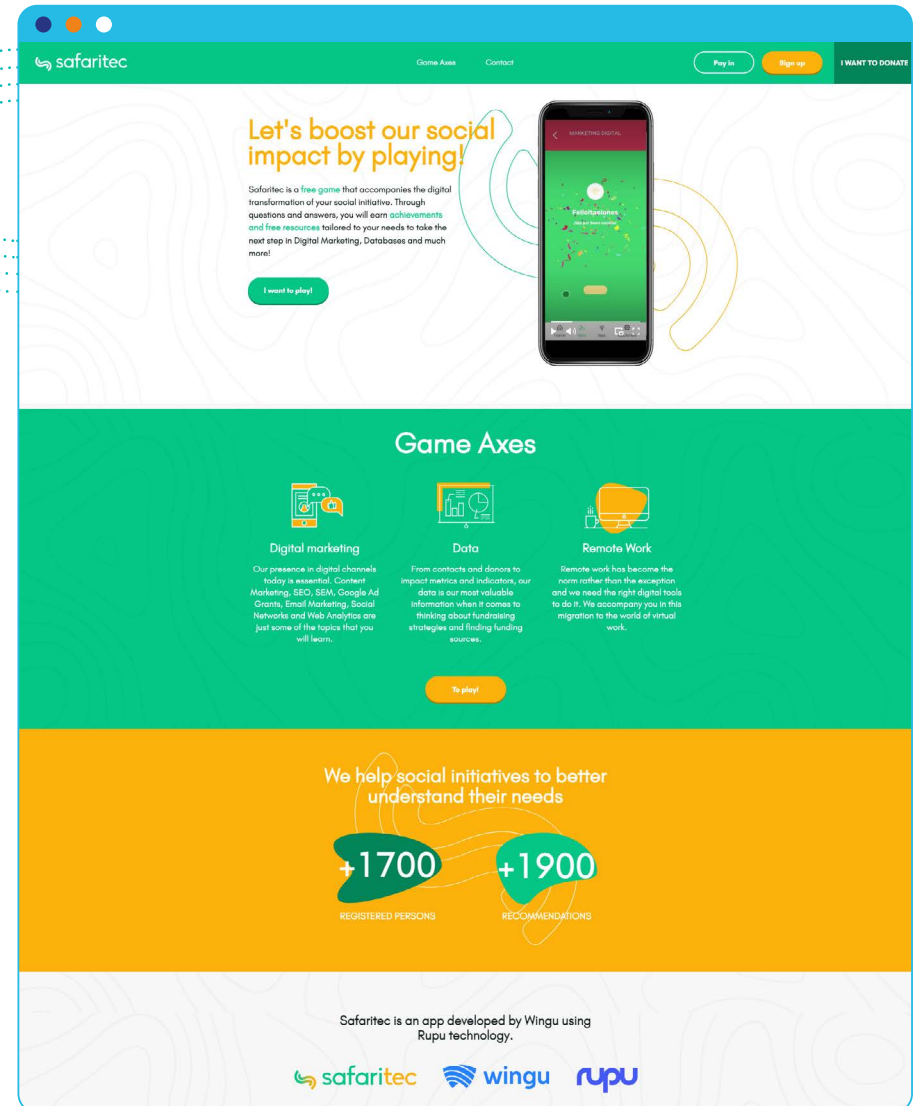
How the tool works

There is a *short explainer video* on the tool home page. The tool is set up as a Q&A multiple choice game with three different branches to follow. For each question there are multiple paths to follow, according to the responses given, allowing for personalized learning. Whilst answering the questions, the user earns achievements and complementary resources tailored to their needs. The results are automatically saved on the platform, offering an easy to access list of recommended resources to return to. The test can be retaken or resumed at different moments, helping to track and see progress.

Summary

Safaritec is ideal for those in Spanish speaking countries and organizations. It is particularly well suited to informal and small nonprofit organizations, as well as those at an early stage of digital transformation. It is the only tool created as a game and is particularly user friendly. It is distinct because of its focus on supporting progress through tailored resources to support progress. Rather than providing scoring, progress is tracked incrementally and practically through the learning materials.

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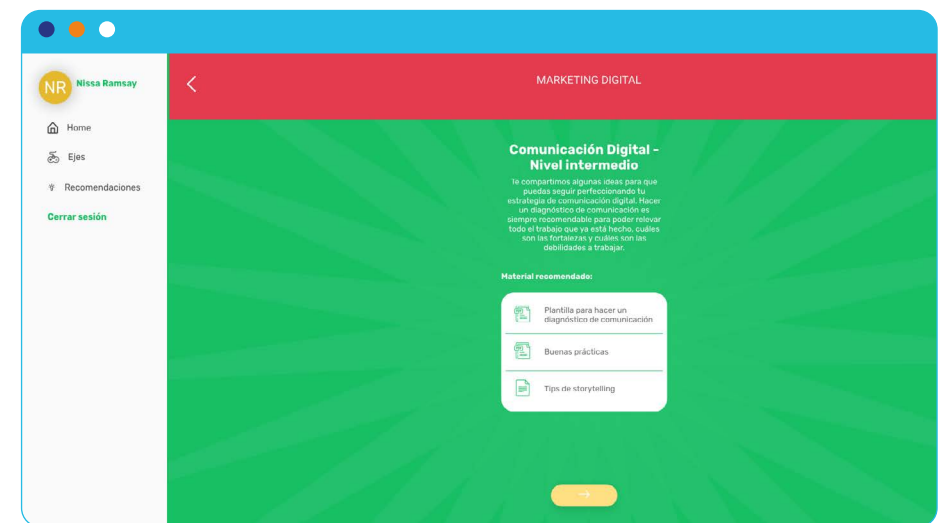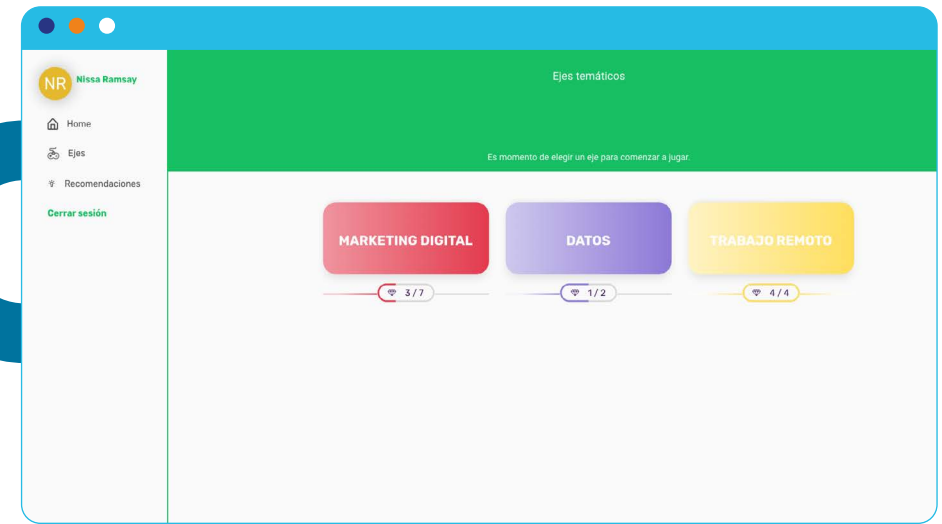
Australia   English   Nonprofit

Infoxchange Digital Transformation Hub

The *Digital capability quiz* is a free tool, designed to help Australian nonprofit organizations to identify and assess their digital capability.

It was designed in 2021 as part of the *Digital Transformation Hub*, setup by *Infoxchange*, an Australian nonprofit social enterprise that has delivered technology for social justice for over 25 years. Their mission is to strengthen communities using technology to create positive social change. The Digital Transformation Hub is supported by the *Social Sector Transformation Fund* and provides a wider package of digital and information technology advisory services to eligible charities.

What it assesses

The Digital Transformation Hub presents three stages of progress in digital maturity for organizations: Basic, Intermediate, and Advanced. The tool comprises of 28 questions which cover five areas of operation:

- Tech foundations (facilitating staff collaboration, productivity and infrastructure);

- Information systems (operating systems and services used e.g. for client management & HR)

- Digital marketing (website, social media and fundraising)

- IT management (IT strategy planning risk management and governance)

- Cyber security (information and data security)

Digital capability quiz

Digital Marketing

Please select all statements that are true for your organisation.

15. Website
- We have a website but it needs an update and may not be mobile friendly
- We have a responsive, engaging website that tells our story, can be easily shared and attracts supporters and clients
- We use Google Ad Grant to promote our work and services
- We actively monitor and work to improve website engagement and search rankings
- We appear on the first page of relevant search results and attract good numbers of engaged visitors to our site.

16. Email marketing
- We have an electronic newsletter we send to subscribers on a semi-regular basis
- We've identified the purpose of our email marketing, we track our outcomes and we use an EDM tool (e.g. MailChimp, Campaign Monitor, a CRM or similar)
- Our email marketing and content strategy aligns with our website and social media marketing strategies
- We track user engagement with our content to prioritise content development and engage more effectively with our supporters

17. Social media
- We use one or two social media platforms but struggle to post engaging content regularly
- We have a social media strategy that articulates why we use social media, which platforms we use and our targets
- We regularly post engaging content which is shared and liked by a good number of people
- We engage with large, active online communities through social media who passionately and measurably help us achieve our mission.

18. Fundraising
- We take donations through our website and track current/prospective donors through a spreadsheet
- We monitor relevant channels for appropriate grants and are relatively successful when we apply
- We have processes in place to foster potential donors and leverage multiple social and email platforms to strengthen our donor pipeline
- We use a sophisticated system (CRM or similar) to track contact and engagement across multiple platforms (social, events, email, donations, etc) and we have explored mobile fundraising and crowdfunding options
- We have a large group of donors who support us regularly and we understand them well.

Back   Next

THINK SOCIAL TECH | techsoup GLOBAL NETWORK
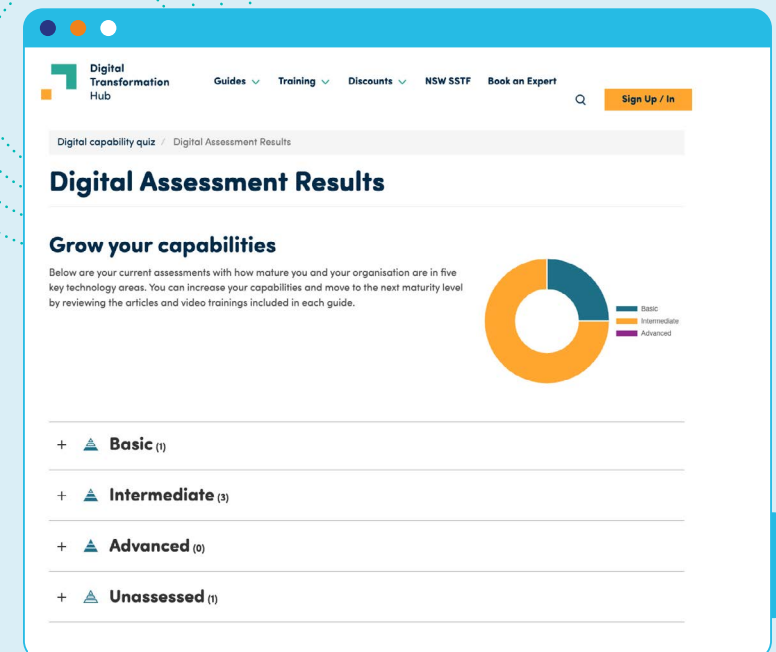
Digital Transformation Hub

How the tool works

The tool takes approximately 15 minutes to complete. No signup is required (although there is an option to do so) and the tool is easy to access. The 28 questions are multiple choice and some definitions are given. There are a variety of question styles, with some asking whether the organization has particular infrastructure or types of technology in place, whereas others are multiple choice. Some show a clear sense of progression from basic to advanced practice, whilst others contain a mixture of positive and negative statements. This can be confusing at points to understand how to best answer the questions but the responses are easy to understand. There are clear concise follow up guides for each area at all stages (including advanced, intermediate and basic).

Once the tool is complete, it gives you a score and stage of digital maturity. The site also offers links to further support, guides and information. The recommendations are based on overall levels of digital skills (rather than specifically tailored responses scored against the areas of digital covered). The tool records what you answered last time and it recommends that you retake the assessment every 6 months.

Summary

This tool is user-friendly and easy to complete with a helpful visualization at the end of the questionnaire. The questions in this tool look to be particularly helpful to smaller organizations working in face to face settings. It is a short survey with a focused set of questions that are weighted towards risks, internal systems and communications.

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