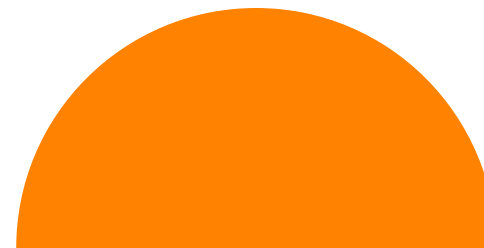


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About TechSoup



Felipe Reyes

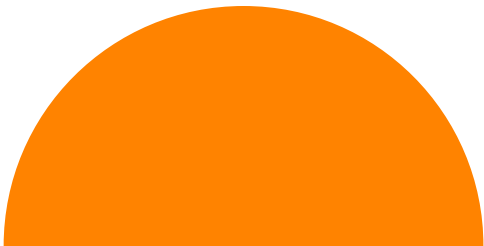
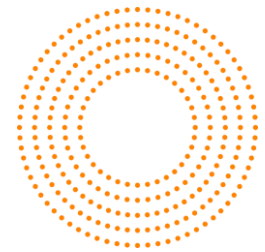
- Director, Customer Development
- freyes@techsoup.org
- 312-925-3069 (ok to text)
- Remote from Chicago, Illinois





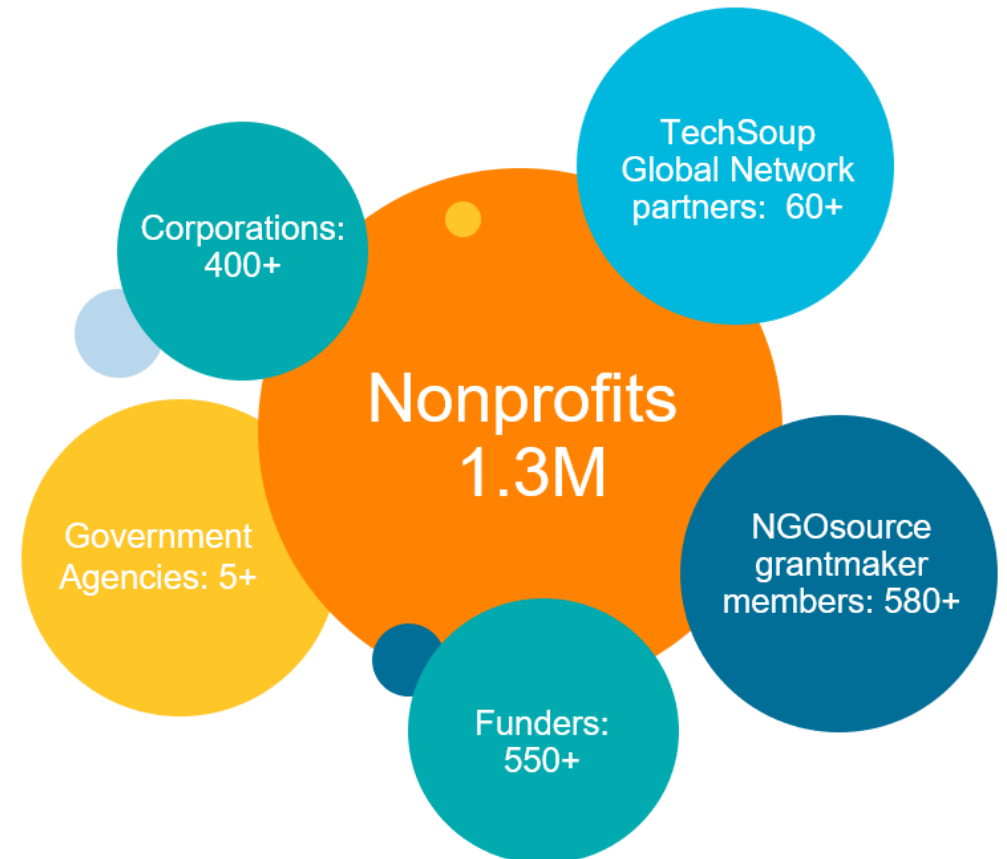
Polling question

Who has heard of TechSoup?



TechSoup is a Nonprofit Social Enterprise That Connects NGOs with Mission-Critical Resources Worldwide

- Provider of technology products, services, and education for qualified organizations
- Curator of the largest international database of validated NGOs
- Facilitator of international grantmaking
- Amplifier for Corporate Social Responsibility (CSR) worldwide
- Incubator for community-driven technology for good



**To build a dynamic bridge that leverages technology
to enable connections and innovative solutions
for a more equitable planet.**



Our Impact: Together, We Build a Stronger, More Resilient Civil Society



1.3
Million

Nonprofits
Served

\$16+
Billion

Market value of
In-Kind Tech and
Funding Facilitated

236

Countries and
Territories Reached

39

Languages
Supported

62

Partners in the
TechSoup
Global Network

Metrics updated March 2022

TechSoup Is a Critical Resource for a Wide Variety of Stakeholders



"NetSquared offers me a face-to-face space where I can connect with like-minded peers, help build my skills and creates a community... I feel less alone and more connected because of NetSquared events."

-Chad Leaman, Director of Innovation Neil Squire Society



"... Both practical and transformative, TechSoup's NGOsource addresses an acute need in philanthropy."

-Pamela Foster, COO, Co-Impact, formerly with Rockefeller Foundation



"The TechSoup network is incredible because there's so much dispersed knowledge about nonprofits in every country all over the world, and for us to be able to become experts in that way is impossible."

-Kerry Rodgers, Airbnb



"As a nonprofit we would have been left in the dust... without TechSoup and the generosity of our donors. This really works and serves! Another great American philanthropic idea!!"

-Jeremiah Enna, The Culture House

Getting Started with TechSoup

Step 1



Sign Up for Free!

Get started by signing up on TechSoup. This allows you access to a variety of resources like blogs, forums, articles, training resources, and so much more. And it's free to join!

[Sign up now](#)

Step 2



Add Your Organization

Add your organization to your account. TechSoup will validate your nonprofit status. You will receive a welcome email once your status has been validated.

[Watch Why Join TechSoup](#)

Step 3

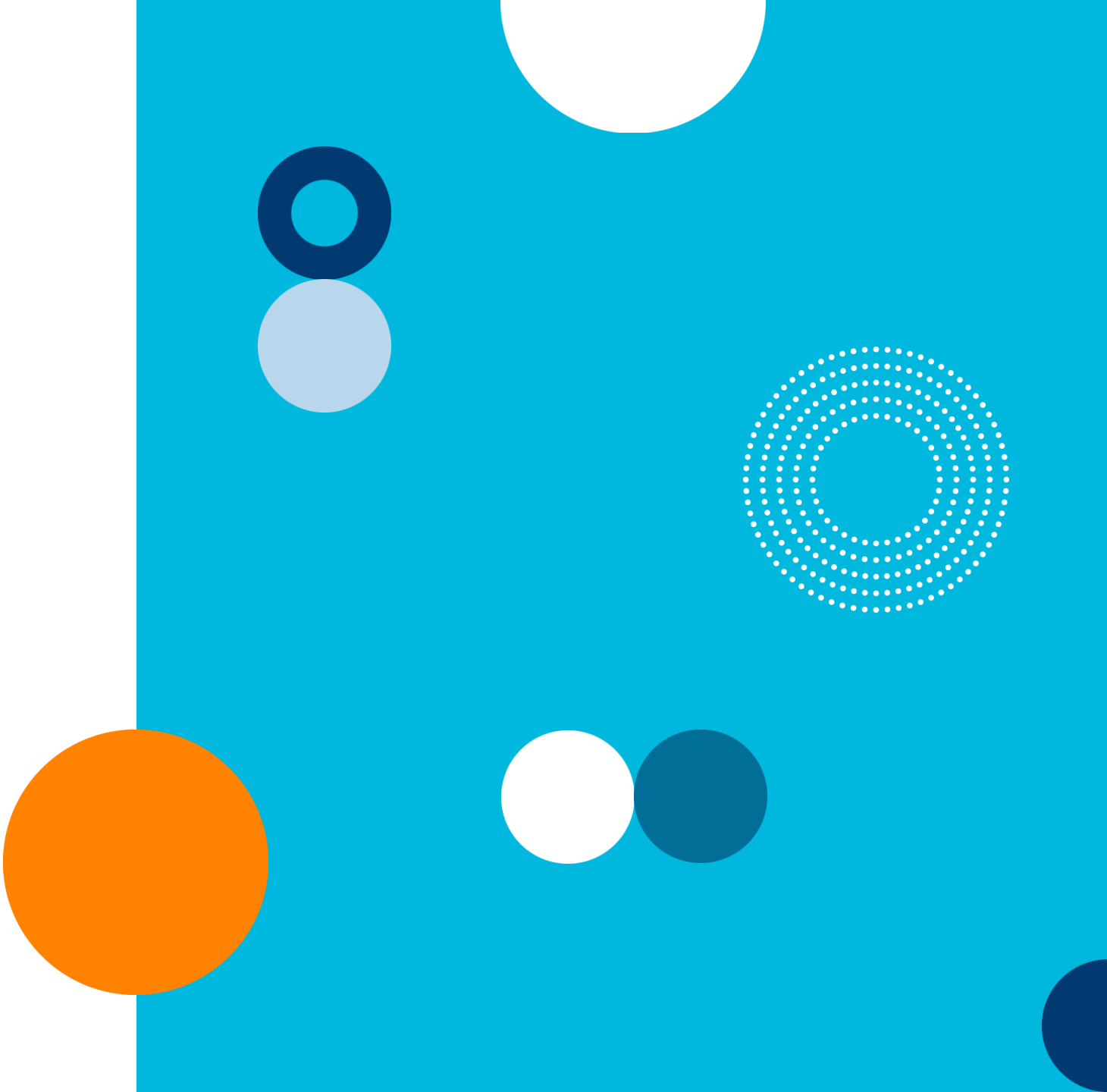


Get Exclusive Offers

Now you're ready to request tech donations and discounts from our Nonprofit Tech Marketplace.

[Browse our catalog](#)

Funders, Donors, and Partners



Select Funders, Strategic Partners, and Corporate Clients





The TechSoup Ecosystem

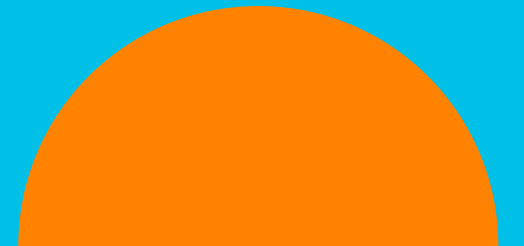
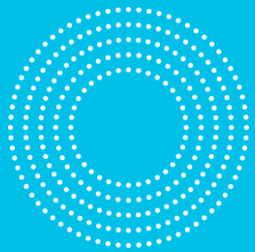
Technology Planning • Access to Technology • Installation and Management of Tech

Staff and Volunteer Training • Connection to Resources



Digital Assessment Tool (DAT)

Leveraging the DAT for Digital Transformation



What is Digital Transformation?

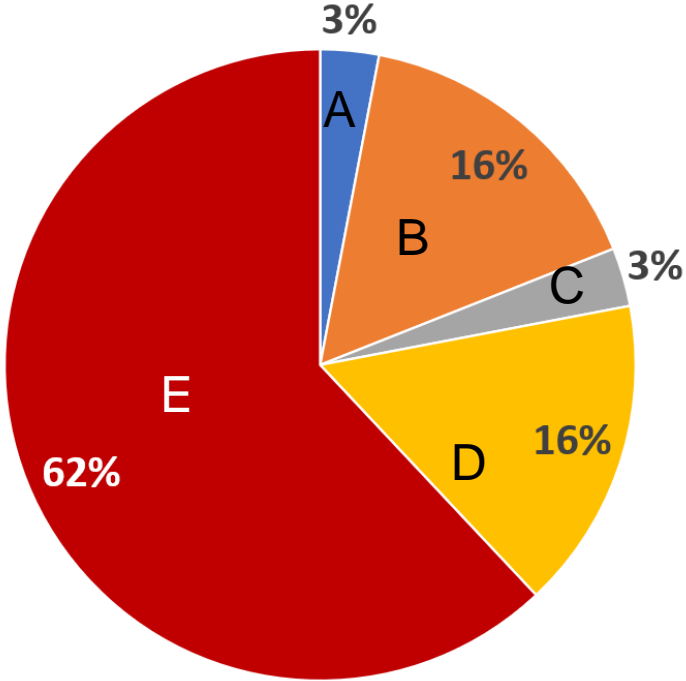
- Increase nonprofit digital capacity and capabilities so that they can meet their mission goals and increase their impact.

Do More (Mission & Impact) **with Less** (staff, money, time ...)

January 2023 Survey of Nonprofit Organizations

Does your organization have a Digital Transformation Plan?

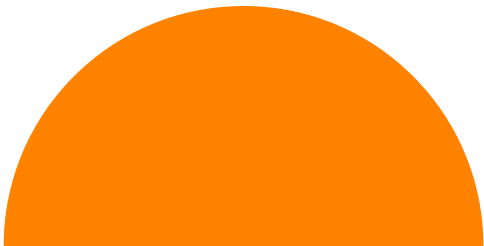
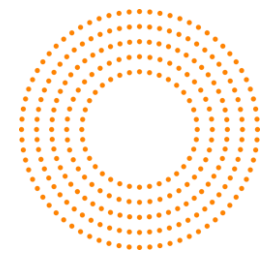
#	Responses	%
A	Yes. We have a well-defined and well-communicated plan.	3%
B	Yes. But it isn't very well-defined or well-communicated.	16%
C	Yes. But not sure what it is.	3%
D	Not sure if we have a plan.	16%
E	We don't have a plan.	62%



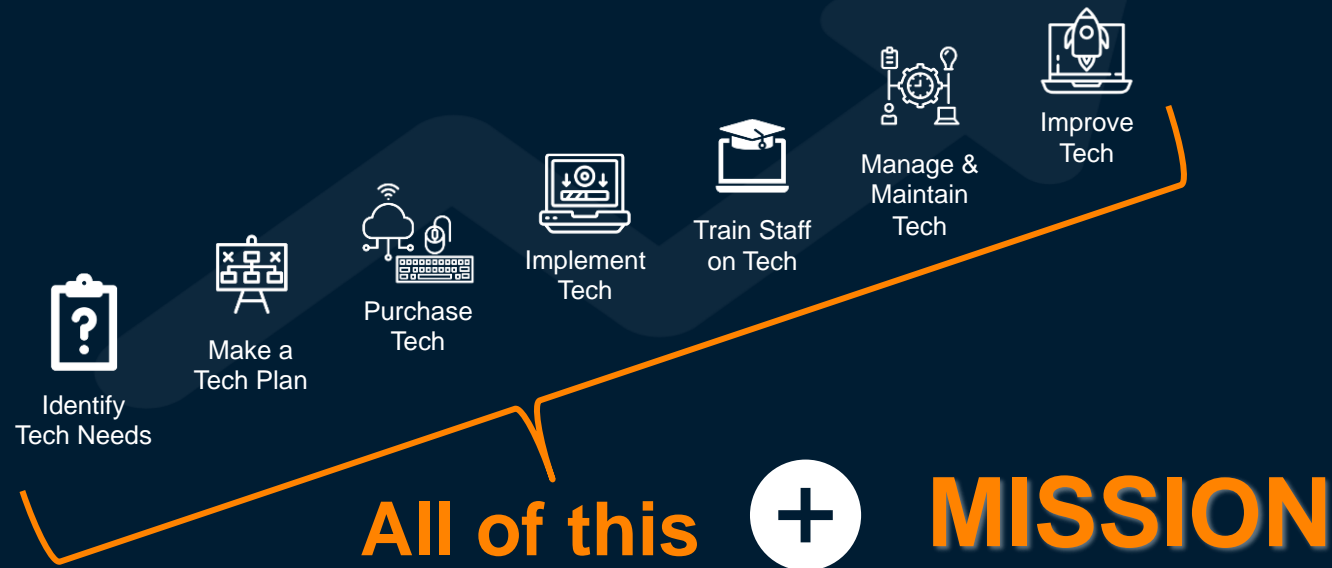


Polling question

Does your organization have a Digital Transformation Plan?



Digital Transformation is Complex and Hard.



1. The Nonprofit Digital Transformation Journey is complicated and requires a lot of time and attention to get it right.

2. Without a proper strategy, your team is expected to juggle their current mission delivery with the additional implementation of the digital plan – making buy-in and follow-through difficult.

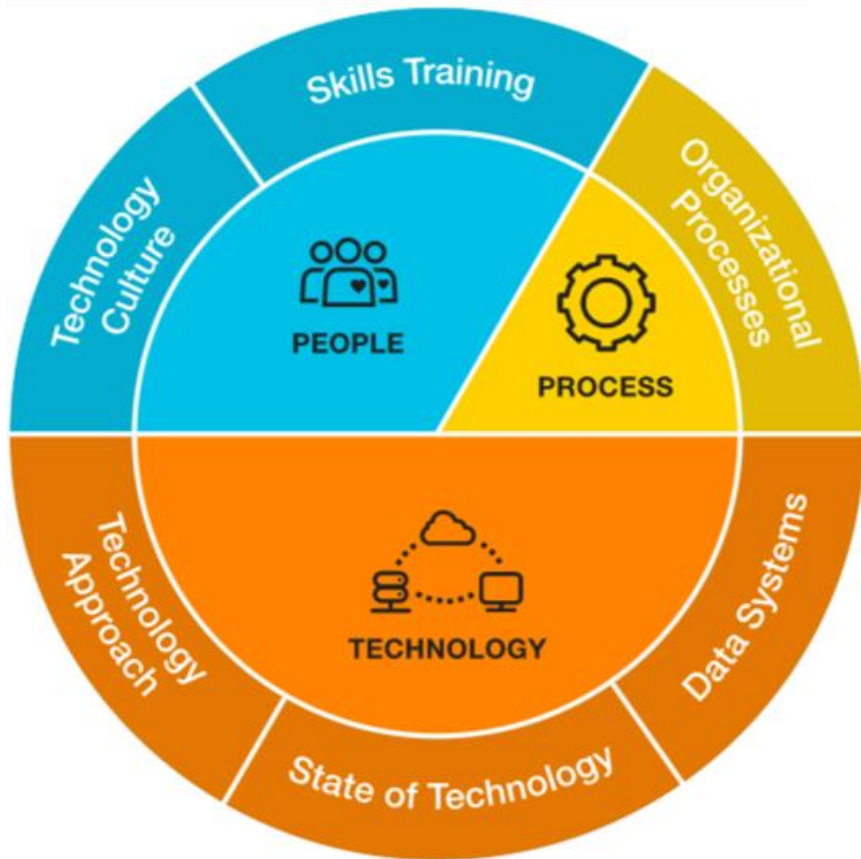
3. Your Organization's Digital Plan cannot succeed without alignment with your Mission and priorities, and a proper buy-in with your team is critical to transforming Skills, Culture, Process and the way technology is used in the organization.

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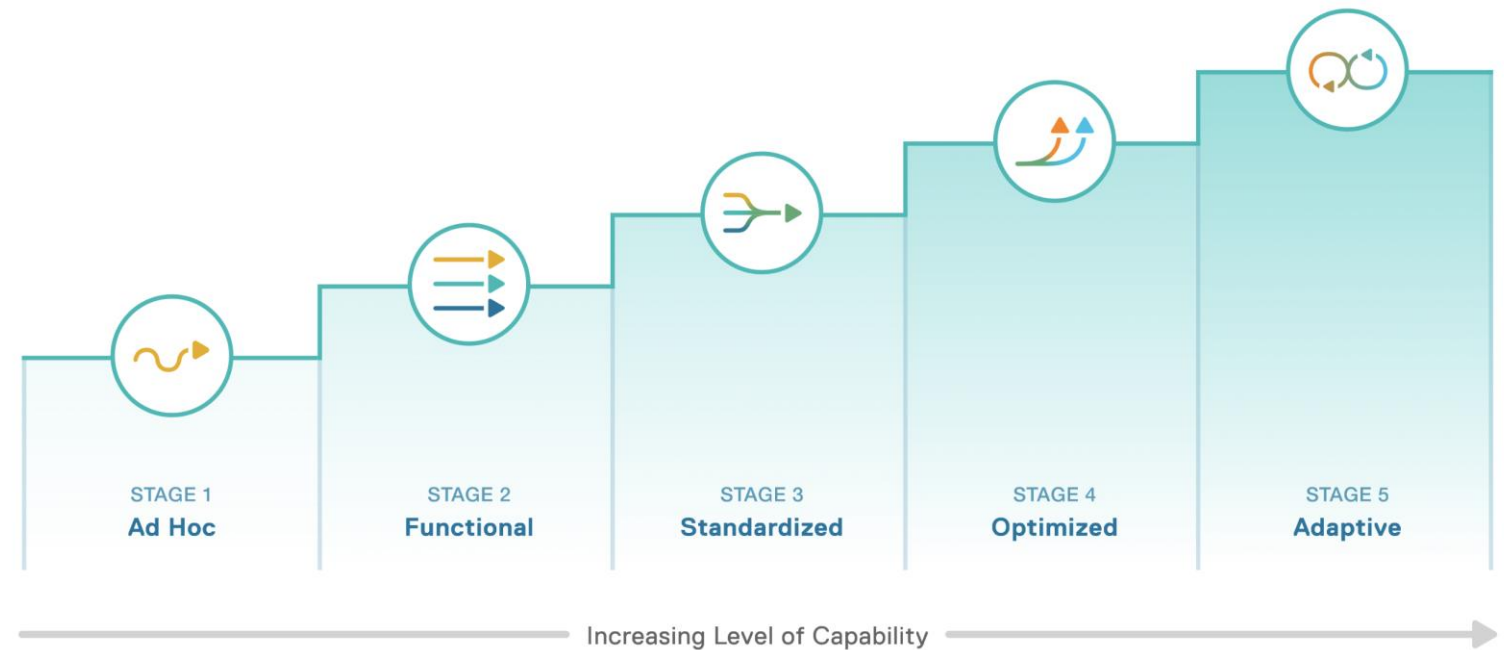
Using the TechSoup
Digital Assessment Tool
for Your Nonprofit Planning



The Digital Capability Model measures an org's digital capability by assessing how **People** and **Process** are integrated into the **Technology** implementation in the organization.



Organizations are rated by their digital capability in each focus area.





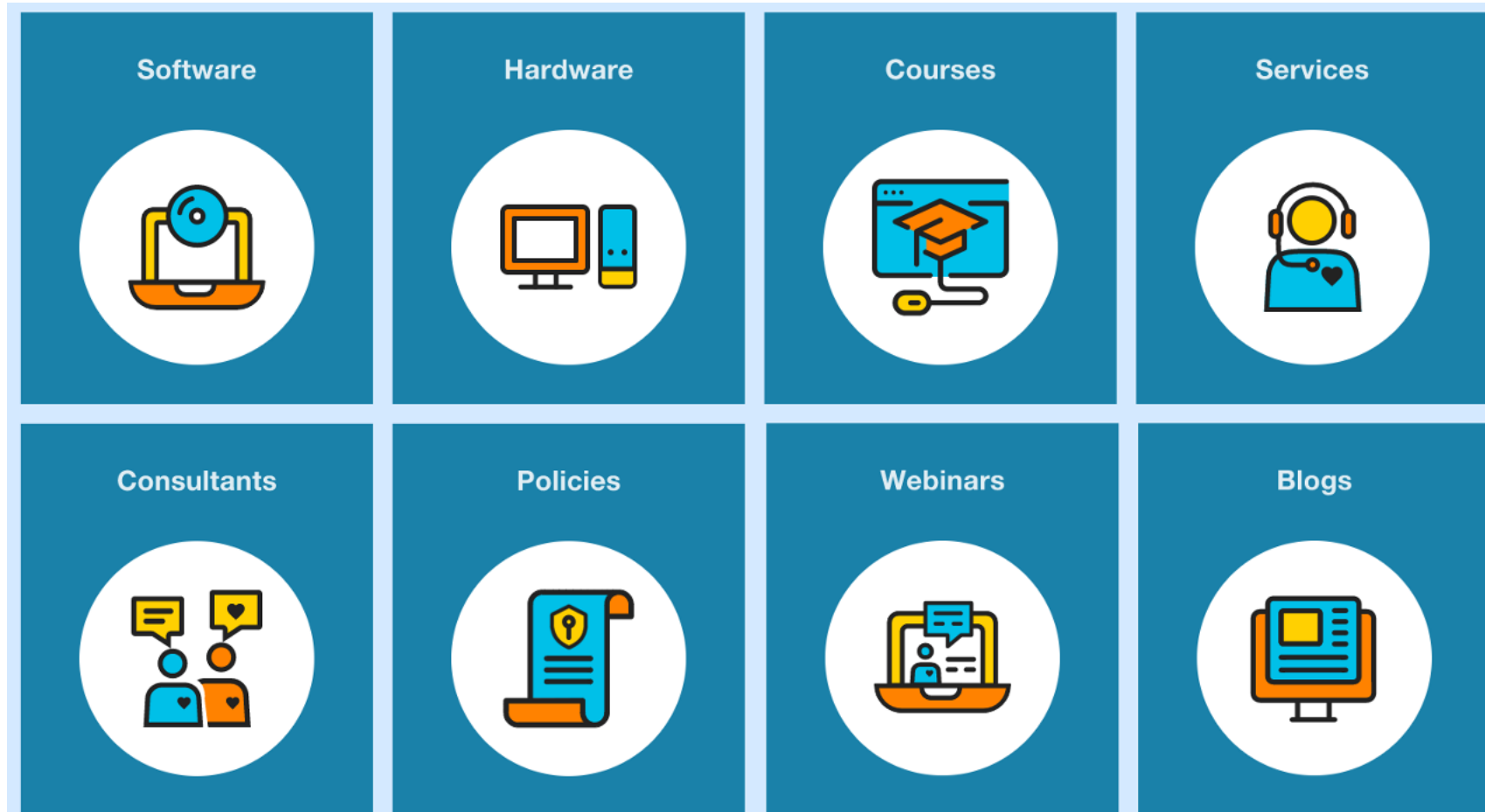
BYOT – Bring your own Technology

Polling Q. What personal tech are you bringing to your nonprofit

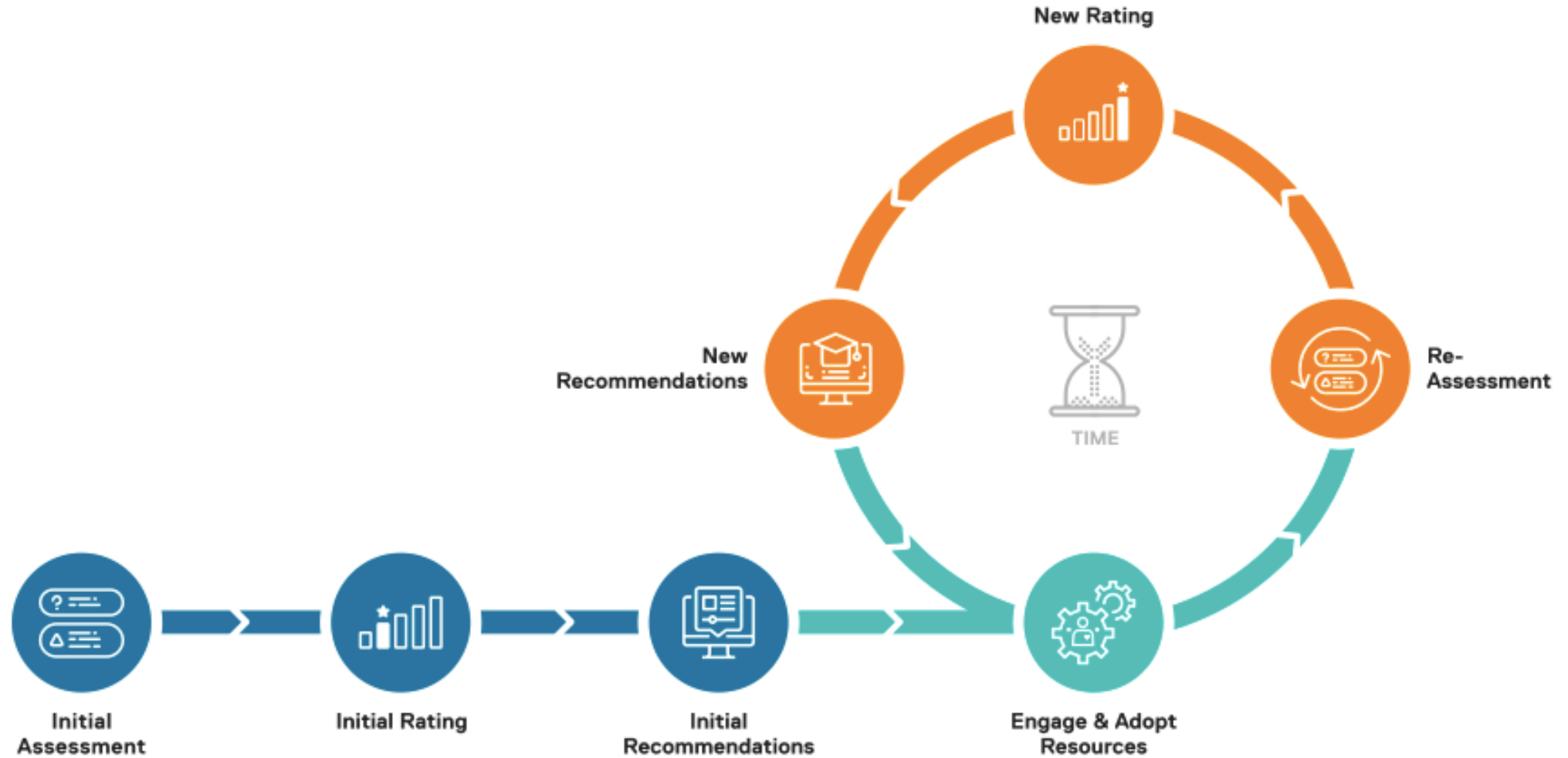
Tech = software, hardware, devices, tech subscriptions



The Digital Assessment Tool (DAT) aims to facilitate intentional conversations and provide resources to understand how to plan your organization's digital transformation.



Digital Assessment Journey



Getting Started

<https://assessment.techsoup.org/>



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Digital Assessment Tool

[About the DAT](#) [Features](#) [How It Works](#) [Contact](#) [Resources](#) [Glossary](#)

LOGIN

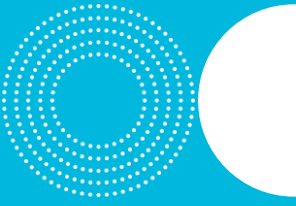
SIGN UP

Discover your nonprofit's path to digital transformation — for free

For your organization to achieve its impact goals, it's critical to use the right technology solutions. TechSoup is here to help. Use our Digital Assessment Tool (DAT) to identify your needs and find the best resources to meet them.



Feedback



DAT Modules



Digital Assessment Tool Focus Areas

- Introductory Assessment
- Operations and Collaboration
- Fundraising and Development
- Digital Security
- Communications and Marketing
- Program Delivery and Management
- Hardware and Infrastructure

Digital Assessment Tool Focus Areas

- **Introductory Assessment:**
 - **20 Questions**
 - **Sets the baseline**
 - **Can only be taken once**

1. How does your organization plan and coordinate service delivery?

Please select the option that best fits your organization.

Our organization does not do direct service delivery.

We use very little technology to plan and coordinate services, and where we do use it, tools vary according to individual staff preference. Technical support, processes, and training for technology to facilitate or track service delivery are inadequate or nonexistent.

MORE DETAILS ▼

We use basic digital tools to plan and coordinate services, but they don't fully meet our needs, or we aren't using them as well as we could. Processes, tech support, and training are basic, and this type of technology doesn't seem to be a priority.

MORE DETAILS ▼

We have a standard set of shared tools like email lists, spreadsheets, and documents. These generally meet our needs, but they may lack some features, or we are not using their advanced features. Processes, support, and training are adequate.

MORE DETAILS ▼

We use one platform to manage all aspects of planning service delivery, as well as a dedicated platform to coordinate communications, but it is not always easy to share data between these platforms. Staff members are well trained, processes and support are strong, and this technology aligns with our overall strategy.

MORE DETAILS ▼

We use a comprehensive platform to manage all aspects of planning and coordinating service delivery. It has integrated communications and meets current needs as well as anticipated future needs. Staff members are experts in the system, it is treated as a strategic asset, and our nimble approach enables us to make the most of new features and be responsive to changes in program needs or available tools.

MORE DETAILS ▼

2. How does your organization facilitate project management for programs?

Please select the option that best fits your organization.

Our organization does not facilitate project management for programs.

We manage projects manually, though we might use some basic digital tools such as email and spreadsheets. Technical support, processes, and training on using technology to support project management are inadequate or nonexistent.

MORE DETAILS ▼

We manage projects using basic digital tools, but there is no standard tool set. The tools don't fully meet our needs, or we aren't using them as well as we could. Processes, tech support, and training are basic and this type of technology doesn't seem to be a priority.

MORE DETAILS ▼

We use a standard project management tool set that generally meets our needs, but it may lack some features, or we are not using its advanced features. Processes, support, and training are adequate.

MORE DETAILS ▼

We use a comprehensive project management system that meets current needs and integrates with other key systems. Staff members are well trained, processes and support are strong, and this technology aligns with our overall strategy.

MORE DETAILS ▼

We use a comprehensive, highly sophisticated project management system that meets current needs as well as anticipated future needs. Staff members are experts in the system, and they receive strong support. It is treated as a strategic asset, and our nimble approach enables us to make the most of new features and be responsive to changes in needs or available tools.

MORE DETAILS ▼

3. How does your organization collect program-related data?

Please select the option that best fits your organization.

Our organization does not collect program-related data.

Program-related data is mostly collected using paper-based or some basic digital methods. Processes and training on collecting project-related data using digital tools are limited or nonexistent.

MORE DETAILS ▼

We use a mix of basic, free web-based tools (such as Google Forms or free SurveyMonkey accounts) to collect program-related data, but what tools are used depends on the staff person. Processes and training related to gathering feedback are not very well developed or standardized.

MORE DETAILS ▼

We generally use a standard set of online surveys or mobile data collection tools to collect program-related data, although sometimes staff members use different tools. Adequate processes and training are in place to support staff members to collect project-related data.

MORE DETAILS ▼

We collect program-related data using a set of common tools that are in line with our overall M&E data collection processes and standards. Processes and training related to collecting program-related data are fairly robust.

MORE DETAILS ▼

We collect program-related data using a mix of commonly used and newer, more innovative tools (such as sensors), and it is all managed and tracked through our comprehensive M&E platform. Processes and training related to gathering data are extremely robust, and staff members are given resources to further build their capacity.

MORE DETAILS ▼

4. How does your organization plan, coordinate, and measure fundraising campaigns?

Please select the option that best fits your organization.

Our organization does not run fundraising campaigns.

We generally use word processing software and spreadsheets to develop plans and keep track of progress. Technical support, processes, and training on using the technology for this purpose are inadequate or nonexistent.

MORE DETAILS ▼

We use a basic fundraising platform that is not linked to other relevant systems and either doesn't fully meet our needs or we aren't using it as well as we could. Processes, tech support, and training are basic, and this type of technology doesn't seem to be a priority.

MORE DETAILS ▼

We manage campaigns using a fundraising platform or CRM that generally meets our needs, but it may lack some features, or we are not using its advanced features. Processes, support, and training are adequate.

MORE DETAILS ▼

We use a fundraising platform or a module included in our CRM that meets current needs and integrates with other key systems. Staff members are well trained, processes and support are strong, and this technology aligns with our overall strategy.

MORE DETAILS ▼

We use a full-featured fundraising platform or a robust module in our CRM that meets current needs as well as anticipated future needs. There is seamless integration and strong support. Staff members are experts in the system, it is treated as a strategic asset, and our nimble approach enables us to make the most of new features and be responsive to changes in finance needs or available tools.

MORE DETAILS ▼

5. How does your organization manage its ongoing relationships with individual donors?

Please select the option that best fits your organization.

Our organization does not manage relationships with individual donors.

We don't have a consistent way to track donor info or contact donors. We store donor info in multiple spreadsheets or email lists. Technical support, processes, and training for this technology are inadequate or nonexistent.

MORE DETAILS ▼

We keep a master spreadsheet of donors or track donors using an email marketing platform (such as Mailchimp) or an accounting program (such as QuickBooks). Processes, tech support, and training are basic, and this type of technology doesn't seem to be a priority.

MORE DETAILS ▼

We manage donor relationships using basic features of a fundraising, donor management, or CRM platform. It generally meets our needs, but it may lack some features, or we are not using its advanced features. Processes, support, and training are adequate.

MORE DETAILS ▼

We manage donor relationships using a fundraising/donor management platform or module included in our CRM, which is integrated with other relevant systems and meets our present needs well. Staff members are well trained, processes and support are strong, and this technology aligns with our overall strategy.

MORE DETAILS ▼

We manage donor relationships using advanced capabilities of a full-featured fundraising/donor management platform or CRM, which has seamless integration and automation. Staff members are experts in the system, it is treated as a strategic asset, and our nimble approach enables us to make the most of new features and be responsive to changes in fundraising or available tools.

MORE DETAILS ▼

6. How does your organization establish and develop new donor relationships?

Please select the option that best fits your organization.

Our organization does not have relationships with individual donors.

Our use of technology for donor prospecting and cultivation is limited to spreadsheets or email lists and varies among staff members. Technical support, processes, and training for this technology are inadequate or nonexistent.

MORE DETAILS ▼

We keep prospective donor information in a spreadsheet that one staff member manages, though additional lists and tracking methods might also exist. Processes, tech support, and training are basic, and technology to support donor cultivation doesn't seem to be a priority.

MORE DETAILS ▼

We keep prospective donor information in our fundraising or CRM platform, which also helps us manage periodic outreach to cultivate the relationship. It generally meets our needs, but it may lack some features, or we are not using its advanced features. Processes, support, and training are adequate.

MORE DETAILS ▼

We manage prospective donors using a fundraising platform or module included in our CRM, which meets current needs and integrates with other key systems. Staff members are well trained, processes and support are strong, and this technology aligns with our overall strategy.

MORE DETAILS ▼

We manage prospective donors using a full-featured fundraising platform or a robust module in our CRM that meets current needs as well as anticipated future needs. There is seamless integration and strong support. Staff members are experts in the system, it is treated as a strategic asset, and our nimble approach enables us to make the most of new features and be responsive to changes in finance needs or available tools.

MORE DETAILS ▼

20. How does your organization teach your staff to recognize and counteract cybersecurity threats?

Please select the option that best fits your organization.

Our organization does not need digital security awareness training.

Staff members have a low level of cybersecurity awareness, and we don't provide any resources or training for this.

MORE DETAILS ▼

We provide some cybersecurity awareness or training resources, but there is no standard or routine processes or training.

MORE DETAILS ✕

- An internal person provides some training or cybersecurity tips to our staff occasionally.
- We provide some resources on an ad hoc basis, such as circulating an article or tip sheet, but we do not have formal processes.
- We allocate funds and time to cybersecurity training if an individual or department requests it.
- We don't know where most of our problem areas are.

We provide some basic cybersecurity training and resources to all staff members, and they know the basics.

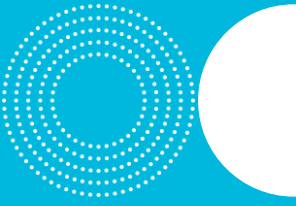
MORE DETAILS ▼

We have a comprehensive cybersecurity training program and staff members are good at identifying and responding to attacks.

MORE DETAILS ▼

We have a very robust cybersecurity training program and staff members are very good at

Each question expands to provide greater detail and clarity.



DAT Demo



Getting Started

- Getting Started with TechSoup PDF <https://hubs.ly/Q01PYF-0>
- Digital Assessment Tool DAT <https://assessment.techsoup.org/>
- Website Wellness Assessment <https://page.techsoup.org/how-healthy-is-your-website-get-the-website-wellness-report>
- Digital Marketing Assessment <https://page.techsoup.org/digital-marketing-grader>
- Google Ad Grant <https://www.techsoup.org/google-for-nonprofits>

- Questions about the DAT: assessment@techsoup.org
- All other TechSoup questions freyes@techsoup.org