

DIGITAL TRANSFORMATION

# NGO **Digital** Maturity Assessment

A Comprehensive Framework for Assessing Digital Capability in Not-for-Profit Organisations in Aotearoa New Zealand and Australia

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| [AmplifyData.org.nz](https://AmplifyData.org.nz)

Digital Strategy

Data & Analytics

Technology

Service Delivery

Self-Assessment

Roadmap Planning

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# Introduction to Digital Maturity

Understanding what digital maturity means for not-for-profit organisations

## What is Digital Maturity?

Digital maturity describes an organisation's ability to leverage technology effectively to achieve its mission. For not-for-profits, this means using digital tools and data to deliver better outcomes for beneficiaries, engage supporters, and operate more efficiently.

### The Digital Imperative for NGOs

- Beneficiaries expect digital service options
- Funders increasingly require data-driven reporting
- Donors engage primarily through digital channels
- Remote and hybrid work requires digital capability
- Compliance and governance demand better data management
- Sector collaboration increasingly relies on digital platforms

## Who This Assessment Is For

### CEOs & Executive Directors

Strategic oversight of digital investment and understanding organisational digital capability.

### Board Members

Governance of digital strategy and risk, ensuring digital aligns with mission.

### Operations Managers

Identifying technology gaps and planning system improvements.

### Programme Managers

Understanding how digital tools can enhance service delivery and outcomes measurement.




# Digital Maturity Model

Level framework across six dimensions of digital capability

## Five Maturity Levels

Level 1	<b>Initial/Ad Hoc</b> — No formal digital strategy. Technology use is reactive and inconsistent. Limited data collection.
Level 2	<b>Developing</b> — Basic digital tools in place. Some awareness of digital potential. Inconsistent data practices.
Level 3	<b>Defined</b> — Digital strategy exists. Core systems implemented. Regular data collection and basic reporting.
Level 4	<b>Managed</b> — Integrated digital approach. Data-driven decisions. Effective digital service delivery.
Level 5	<b>Optimising</b> — Digital innovation culture. Advanced analytics. Continuous improvement driven by data insights.

## Six Dimensions of Digital Maturity

 <b>1. Digital Strategy &amp; Leadership</b> Vision, governance, budget allocation, and board engagement with digital.	 <b>2. Data &amp; Analytics</b> Data collection, quality, analysis capability, and data-driven decision-making.	 <b>3. Technology Infrastructure</b> Systems, integration, security, and cloud adoption.
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#### **4. Digital Service Delivery**

Online services, beneficiary experience, and digital channel management.



#### **5. Digital Fundraising**

Online giving, digital marketing, donor engagement, and supporter journeys.



#### **6. Digital Culture & Capability**

Staff skills, training, change management, and innovation mindset.

# Dimension 1: Digital Strategy & Leadership

Defining your organisation's digital vision, governance, and investment

## Maturity Level Descriptions

LEVEL	STRATEGY	LEADERSHIP	INVESTMENT
<b>1 - Initial</b>	No digital strategy	No digital leadership role	Ad hoc spending on technology
<b>2 - Developing</b>	IT plan exists but not linked to strategy	IT managed by admin/office role	Reactive budget for technology
<b>3 - Defined</b>	Digital strategy aligned with org strategy	Designated digital lead	Annual digital budget allocated
<b>4 - Managed</b>	Digital embedded in all strategic planning	Board digital champion + staff lead	Strategic multi-year digital investment
<b>5 - Optimising</b>	Digital-first culture, continuous innovation	Board digital competency, CEO champions	Innovation budget, ROI tracking

## Assessment Questions

- Does your organisation have a documented digital strategy?
- Is digital strategy linked to your overall organisational strategy?
- Is there a designated person responsible for digital/technology?
- Does the board discuss digital matters at least annually?
- Is there a specific budget allocation for digital/technology?
- Are digital risks included in your risk register?
- Do you benchmark your digital capability against similar organisations?

# Dimension 2: Data & Analytics

Improving your organisation's ability to collect, manage, and use data effectively

## Maturity Level Descriptions

LEVEL	DATA COLLECTION	DATA QUALITY	ANALYTICS
<b>1 - Initial</b>	Paper-based or scattered spreadsheets	No data standards	No analysis capability
<b>2 - Developing</b>	Basic digital collection, some systems	Some data cleaning	Basic reporting (counts, totals)
<b>3 - Defined</b>	Standardised data collection processes	Data quality procedures	Regular reporting dashboards
<b>4 - Managed</b>	Integrated data from multiple sources	Automated quality checks	Trend analysis, outcome tracking
<b>5 - Optimising</b>	Real-time data collection and integration	Continuous quality improvement	Predictive analytics, AI-assisted insights

## Key Indicators to Assess

### Data Collection

- How is beneficiary data collected?
- Are collection processes standardised?
- Is data collected digitally at point of service?
- Do you collect outcome data systematically?

### Data Storage & Management

- Where is your data stored?
- Is there a single source of truth?
- Are systems integrated or siloed?
- Do you have data governance policies?

### Reporting & Analysis

- Can you generate reports easily?
- Do you have dashboards for key metrics?
- Can you track trends over time?
- Do you use data for decision-making?

### Data Skills

- Can staff create their own reports?
- Is there data literacy training?
- Do you have data analysis capability?
- Can you prepare funder reports efficiently?

# Dimension 3: Technology Infrastructure

Building your systems, security, and technical foundations

## Core Technology Assessment

SYSTEM	LEVEL 1-2	LEVEL 3	LEVEL 4-5
<b>CRM/Database</b>	Spreadsheets, paper records	Basic CRM (e.g., free Salesforce)	Configured CRM with automations
<b>Email/Communication</b>	Free email (Gmail/Outlook.com)	Business email, basic newsletter	Integrated comms platform, segmented
<b>Finance</b>	Spreadsheets, manual bookkeeping	Xero/MYOB basic	Integrated finance with reporting
<b>Collaboration</b>	USB drives, email attachments	Cloud storage (Google/Microsoft)	Full M365/Google Workspace, project tools
<b>Website</b>	No website or static page	Basic CMS website	Dynamic site with forms, payments, analytics
<b>Security</b>	No formal security measures	Passwords, basic antivirus	MFA, encryption, security policies

## Cloud Readiness Assessment

### Benefits of Cloud for NGOs

- **Cost-effective:** Many providers offer free or discounted tiers for nonprofits (Microsoft 365, Google Workspace, Salesforce)
- **Scalable:** Grow without hardware investment
- **Accessible:** Work from anywhere, enabling remote/hybrid models
- **Secure:** Enterprise-grade security included
- **Maintained:** Automatic updates and patching

# Dimension 4: Digital Service Delivery

Exploring how digital channels enhance your programmes and services

## Digital Service Maturity

LEVEL	SERVICE ACCESS	BENEFICIARY EXPERIENCE	IMPACT MEASUREMENT
1 - Initial	In-person only	No digital touchpoints	No systematic measurement
2 - Developing	Phone + email	Basic website information	Paper-based surveys
3 - Defined	Online forms, self-service	Some digital services	Digital feedback collection
4 - Managed	Multi-channel access	Integrated digital experience	Automated outcome tracking
5 - Optimising	Personalised digital journeys	Seamless omnichannel	Real-time impact dashboards

## Digital Service Opportunities

### Quick Wins

- Online referral/intake forms
- Digital feedback surveys
- Appointment booking online
- FAQ/self-help resources

### Medium-Term

- Client portal for information
- Digital programme delivery
- Automated communications
- Mobile-friendly services

### Longer-Term

- Personalised service journeys
- AI-assisted assessments
- Predictive needs identification
- Integrated partner platforms





# Dimension 5: Digital Fundraising & Engagement

Improving your digital capability for donor engagement and revenue generation

## Digital Fundraising Maturity

LEVEL	ONLINE GIVING	DIGITAL MARKETING	DONOR ENGAGEMENT
1 - Initial	No online giving	No digital presence	Manual thank-you letters
2 - Developing	Basic donate button	Social media presence	Email receipts
3 - Defined	Multiple giving options	Regular email newsletters	Automated acknowledgements
4 - Managed	Integrated giving platform	Targeted campaigns	Personalised journeys
5 - Optimising	Peer-to-peer, recurring	Multi-channel, data-driven	Predictive giving models

## Key Metrics to Track

 ONLINE GIVING RATE	 DIGITAL ACQUISITION COST	 EMAIL OPEN RATE	 DONOR RETENTION RATE
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# Dimension 6: Digital Culture & Capability

Building an organisation that embraces digital ways of working

## Digital Culture Assessment

### Digital Skills

- Staff digital literacy levels
- Specialist digital roles
- Ongoing training programmes
- Digital confidence across teams

### Change Readiness

- Attitude to new technology
- Change management processes
- Staff engagement with digital
- Innovation encouragement

### Digital Leadership

- CEO digital engagement
- Board digital literacy
- Digital champions in teams
- Innovation time allowed

### Collaboration

- Digital collaboration tools used
- Remote/hybrid work capability
- Cross-team digital projects
- External digital partnerships

## Building Digital Capability

1

### Assess Current Skills

Survey staff digital skills across basic, intermediate, and advanced levels. Identify gaps and training priorities.

2

### Develop Training Plan

Create role-specific training pathways. Utilise free resources from tech providers (Microsoft, Google, Salesforce).

3

### Recruit Digital Champions

Identify enthusiastic staff in each team to support peers and drive adoption of new tools and processes.

4

### Foster Innovation Culture

Create safe space for experimentation. Celebrate digital wins. Share learnings across the organisation.

# Self-Assessment Tool

Assess your organisation across all six dimensions to identify your digital maturity profile

## Scoring Guide

### How to Score

For each dimension, rate your organisation from 1 (Initial) to 5 (Optimising) based on the maturity level descriptions. Be honest and evidence-based. Consider getting multiple perspectives from different roles.

## Self-Assessment Scorecard

DIMENSION	SCORE (1-5)	EVIDENCE / NOTES	PRIORITY (H/M/L)
1. Digital Strategy & Leadership			
2. Data & Analytics			
3. Technology Infrastructure			
4. Digital Service Delivery			
5. Digital Fundraising & Engagement			
6. Digital Culture & Capability			
Overall Average			

## Interpreting Your Score

1.0 – 1.9	<b>Digital Beginner:</b> Significant investment needed in basic digital foundations. Start with strategy and core systems.
2.0 – 2.9	<b>Digital Explorer:</b> Some building blocks in place. Focus on integration, data quality, and staff capability.
3.0 – 3.4	<b>Digital Practitioner:</b> Good foundations. Focus on optimisation, integration, and advanced analytics.

3.5 – 4.4

**Digital Leader:** Strong digital capability. Focus on innovation, prediction, and sector leadership.

4.5 – 5.0

**Digital Innovator:** Exceptional capability. Share knowledge with the sector and pursue continuous innovation.

# Gap Analysis Framework

Identifying and prioritising areas for digital improvement

## Gap Analysis Template

DIMENSION	CURRENT LEVEL	TARGET LEVEL	GAP	PRIORITY ACTIONS
Digital Strategy & Leadership				
Data & Analytics				
Technology Infrastructure				
Digital Service Delivery				
Digital Fundraising & Engagement				
Digital Culture & Capability				

## Prioritisation Matrix

### Prioritise Based On

- **Mission impact:** Which improvements will most directly benefit your beneficiaries?
- **Funding alignment:** What improvements are funders asking for or willing to support?
- **Quick wins:** What changes can be implemented quickly with existing resources?
- **Foundation building:** What improvements enable other improvements (e.g., CRM before analytics)?
- **Risk reduction:** What digital gaps pose the greatest risk to the organisation?

# Digital Roadmap Planning

Creating a phased plan for your digital transformation journey

## Three-Year Roadmap Framework

Year 1	<b>Foundations:</b> Digital strategy, core systems (CRM, cloud), basic security, staff training plan, data cleanup
Year 2	<b>Integration:</b> System integration, digital service channels, data reporting, advanced training, digital fundraising
Year 3	<b>Optimisation:</b> Advanced analytics, personalisation, innovation projects, sector collaboration, continuous improvement

## Budgeting for Digital

### NGO Digital Investment Benchmarks

- **Minimum:** 3-5% of total budget on technology and digital
- **Recommended:** 5-8% of total budget
- **Transformational:** 8-12% during major digital projects
- **Don't forget:** Budget for ongoing costs (subscriptions, training, support) not just initial setup

# Implementation Guide

Practical guidance for executing your digital maturity improvement plan

## Implementation Success Factors

### Leadership Buy-In

CEO and board must champion digital transformation. Present business case showing mission impact and cost savings.

### Start Small, Scale Up

Begin with pilot projects that demonstrate value. Build confidence before larger investments.

### Invest in People

Technology is only as good as the people using it. Prioritise training and change management alongside systems.

### Measure and Adapt

Set clear success metrics for each initiative. Review regularly and adjust approach based on results.

## Common Pitfalls to Avoid

### Watch Out For

- **Technology-first thinking:** Start with the problem, not the tool
- **Underestimating change management:** People resist change; plan for it
- **Ignoring data migration:** Moving data from old to new systems takes significant effort
- **No ongoing budget:** Subscriptions, training, and support are recurring costs
- **Going it alone:** Leverage sector peers, tech nonprofits, and vendor support
- **Perfectionism:** Done is better than perfect; iterate and improve

# Sources & Further Reading

Resources, tools, and programmes to support your digital journey

## Free & Discounted Technology for NGOs

### Microsoft for Nonprofits

Free Microsoft 365 Business Premium (up to 300 users), Azure credits, Dynamics 365 discounts.

### Google for Nonprofits

Free Google Workspace, \$10k/month Google Ads grants, YouTube Nonprofit Programme.

### Salesforce Nonprofit

10 free Salesforce licences, Nonprofit Success Pack, training through Trailhead.

### Canva for Nonprofits

Free Canva Pro for design and marketing materials.

### Slack for Nonprofits

85% discount on Slack Pro and Business+ plans.

### TechSoup

Marketplace for discounted technology products and services for nonprofits.

## Support Organisations

### New Zealand

- Digital.govt.nz — Digital government resources
- InternetNZ — Digital inclusion programmes
- CERT NZ — Cyber security for small organisations
- Hui E! Community Aotearoa

### Australia

- Infoxchange — Technology for social justice
- Connecting Up — Technology for nonprofits
- Australian Cyber Security Centre
- Digital Transformation Agency

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This assessment framework is provided as general guidance. Organisations should adapt the framework to their specific context and seek specialist advice for complex digital projects.