

Optimisation - Tech

- ☐ Well-developed diversified technology platforms & tools are used to both elicit and solicit audience/prospects & develop reports, analytics etc, manage all donations & donors
- ☐ Some technology platforms (like a grant management tool- e.g. Salesforce, Fluxx etc.) are operational to manage grants and run basic financial and program implementation reports only
- ☐ Technology platforms are used for both donor and financial management but the platforms require more development and automation
- ☐ Most fundraising functions are managed in basic MS Word applications like- MS Excel, PowerPoint etc. and no specific fundraising management software is in use

☐☐ Well-developed diversified technology platforms & tools are used to both elicit and solicit audience/prospects & develop reports, analytics etc, manage all donations & donors

“ Highly developed: Advanced technology use in fundraising operations.

Reflection:

- No response required.
- Others -

Action:

- Have highly developed and future proof technology infrastructure and no actions are required.
- Others -

Notes for Development:

1. Advanced technology use in fundraising operations.
2. All fundraising functional needs are covered by various types of tech tools.
3. Strong cultural and conceptual awareness on the use of technology for greater and deeper social impact exist in the organisation

☐☐ Some technology platform (like a grant management tool- e.g. Salesforce, Fluxx etc.) are operational to manage grants and run basic financial and program implementation reports only

“Developing: High need areas are covered only.

Reflection:

- Are we aware of some of the most urgent needs in this area; what can and must be met?
- What has impede tech growth-state of our mind or resources?
- Others -

Action:

- Conduct a comprehensive technology infrastructure assessment and create budget for new needs.
- Cultural alignment has to be stronger for technology related adaptation.
- Others -

Notes for Development:

1. High need areas are covered only.
2. Conduct tech needs assessment for further developing systems and improving processes.
3. Consider reviewing existing tech systems and identify if it is apt for future fundraising operations.

☐☐ Technology platforms are used for both donor and financial management but the platforms require more development and automation

“Under developed: Limited technology use for a few back office activities only.

Reflection:

- Create an internal team to solve the problem; define scope clearly.
- Consult a specialist to quickly assess current state and develop a development plan.
- Others -

Action:

- Conduct a comprehensive technology infrastructure assessment and create budget for new needs.
- Cultural alignment has to be made stronger for technology related adaptation.
- Others -

Notes for Development:

1. Limited technology use for a few back office activities only.
2. Conduct tech needs assessment for further developing systems and improving processes.
3. Consider reviewing existing tech systems and identify if it is apt for future fundraising operations.

☐☐ Most fundraising functions are managed in basic MS Word applications like- MS Excel, PowerPoint etc. and no specific fundraising management software is in use

“ Poorly developed: Technology is yet to be introduced as an optimiser in fundraising function and the team operates with basic tools.

Reflection:

- What has impede tech growth- state of our mind or resources?

- Check-listing of existing tech infra. as against need- for various functions (HR, Finance, FR etc.).
- Consult a specialist to quickly assess current state and develop a development plan
- Others -

Action:

- Consult internal functions and determine new technology need.
- Based on identified need, scout for open tools that come at a very low or no cost.
- Others -

Notes for Development:

1. Technology is yet to be introduced as an optimiser in fundraising function and the team operates with basic tools.
2. Identify high needs asap and plan for tech system development.
3. Technology system development is highly necessary. However, if you do not have a fundraising portfolio at all (meaning you do not have more than 1 or 2 funders), it might make sense for you to go slow on tech development and develop a fair portfolio first.