Report for
Nature Forward
Assessment completion date
Dec 20, 2022
Assessment completion date
About reports

OVERALL SCORE
Operating

Struggling
Functioning
Operating
Leading

SECTION
Engagement

YOUR SECTION SCORE
Operating
The practices and systems used in direct support of communications, fundraising and program delivery with constituents.

SECTION
Infrastructure

YOUR SECTION SCORE
Operating
The management and security of data and systems used by and supporting staff and constituents.
SECTION Leadership

YOUR SECTION SCORE
Operating
The way that technology is part of and supports strategic decision-making, organizational culture, and mission effectiveness

SECTION Organization

YOUR SECTION SCORE
Operating
The policies and practices that support equitable and effective technology access, training, and use by all staff.

Significant risk range
The areas where your results indicate necessary investment, action, or training because of the potential for risk to your data and systems or for your staff and constituents.

QUESTION
Disaggregate data by key demographics
Do you have a policy and practice for disaggregating data by key demographics including race and ethnicity, gender identity, and disability?
Your organization’s answer is at significant risk
Categories
Data
Governance
Policy
**What does this mean?**

When analyzing data, aggregate data can sometimes mask discrepancies among key demographics. Having a policy and practice for the disaggregation of data can help reveal insights that may not have been evident in aggregated data and can help identify more equitable, targeted, and specific efforts to inform decision-making.

**Resources**

- Disaggregated data in the big data era (Government of Canada)
- We All Count Data Library (We All Count)
- Equity Guide for Nonprofit Technology (NTEN)
- The Essentials of Disaggregated Data for Advancing Racial Equity (Race Matters Institute)
- Race data disaggregation: What does it mean? Why does it matter? (Minnesota Compass)

**QUESTION**

**Technology training accessible to staff in multiple formats**

To what degree are your technology-related training materials accessible to all staff and offered in multiple formats for different learning styles?

Your organization’s answer is at

**significant risk**

**Training**

**What does this mean?**

Having training materials readily available to all staff helps ensure smooth onboarding for new staff as well as a more effective environment for existing staff. There are also a multitude of different learning styles, so offering technology training materials in multiple formats ensures that staff are able to access the material in a way that works best for them—as well as the situation. For example, when you need to remember how to run a report that you only do once a year, a format that allows you to skip to the specific guidance you need is ideal. However, when you’re learning about how to securely handle sensitive data in your role, it may be better to have the opportunity to ask questions and to confirm understanding. Training may include access to in-person sessions, webinars, and online tutorials. You can also provide
training materials, such as annotated pictures and step-by-step guides, for staff to reference as needed.

**Resources**

- Guidelines for Creating Accessible Content (edX)
- Learning and development in nonprofit data and tech (NTEN Course)
- How To Think Like An Instructional Designer for Your Nonprofit Trainings (Beth Kanter)
- How To Be A Wizard at Tech Training: NTC 2016 Session (Beth Kanter)
- The 8 Best Types of Training Methods for Your Employees (Indeed)
- Learning styles in the workplace: How to build inclusive training programs (efront Learning)

**QUESTION**

**Critical emails and files stored for future reference**

Do you store all critical email and files for future reference (e.g., legal issues or e-discovery)?

Your organization’s answer is at significant risk

**Categories**

Data
Governance
Operations

**What does this mean?**

If you are subject to e-discovery, you will want to be prepared to collect the demanded documents, emails, and data. Having documents organized in either standardized folders or a document management system will help with this. For email, using a litigation hold will give you the flexibility to search all of your emails at once, rather than one user at a time. Both Microsoft and Google have litigation hold options in their cloud offerings, and third-party products are available.

Note that you don’t have to keep all of your files and emails forever to comply with an e-discovery request, but you should have logical document retention policies and keep the information that is current, per those policies, well-organized, searchable, and retrievable.
QUESTION

Human resources data collected through self-serve systems

To what degree is information required by human resources from staff collected through self-serve systems (e.g., vacation time or performance reviews)?

Your organization’s answer is at significant risk

Categories

Operations

What does this mean?

Human Resources (HR) departments are responsible for tracking large amounts of data. Does your organization have online data entry, either directly connected to your HR and payroll systems or collected in spreadsheet formats that can easily be imported? Or is this data manually entered by HR staff? Using automated forms instead of paper and letting staff manage their data instead of asking HR to do it for them are ways that technology can make your work environment more efficient all around. Most modern HR systems include self-service modules, or forms can be created in tools like Google Forms.

Resources

What Is a Human Resources Information System? (Business News Daily)
What is an HRIS? A key tool for all your human resources needs (CIO)
How Can An HRIS Benefit Your Business? (People Managing People)
QUESTION

Staff financial data collected through self-serve systems

To what degree is information required by finance from staff collected through self-serve systems (e.g., expense submission, billable time reporting)?

Your organization’s answer is at significant risk

Categories

Operations

What does this mean?

Finance departments are often responsible for large amounts of data entry. In many nonprofits, this is even redundant data entry, as finance will track a lot of the same information that human resources does. Using automated forms instead of paper and letting staff manage their financial data instead of asking finance to do it for them are ways that technology can make your work environment more efficient all around. Most modern financial and HR systems include self-service modules, or forms can be created in tools like Google Forms.

Resources

What Is a Human Resources Information System? (Business News Daily)
What is an HRIS? A key tool for all your human resources needs (CIO)
How Can An HRIS Benefit Your Business? (People Managing People)

QUESTION

Policy on appropriate use of internet at work

Do you have a policy defining appropriate use of the internet at work?

Your organization’s answer is at significant risk

Categories

Policy

What does this mean?

In most organizations, it’s understood that an employee might check in with their family from work. Staff use computers to stay in touch with people, manage personal chores, and take other assorted actions that are probably appropriate in your
workplace. But many things can be done on the internet that shouldn’t happen on company equipment in the work environment. Obvious examples include sending mass emails on the company email system, viewing inappropriate websites, and gambling online. You should have a clear acceptable use policy that outlines what is allowed and what isn’t.

Resources

Tech Policies for Virtual Teams: A Leader’s Responsibility (Nonprofit Technology)
Acceptable Use Policy (Contract Counsel)
5 Don'ts To Include in Your Acceptable Use Policy (The Nonprofit Times)
Acceptable use policy (Wikipedia)
Writing a Nonprofit Acceptable Use Policy (AUP): A Quick How-To (Affinipay)

QUESTION

Policy on using personal devices for work
Do you have a policy for staff using their own devices for work?
Your organization’s answer is at

significant risk

Categories

Policy

What does this mean?

“Bring Your Own Device” (BYOD) is a popular model for allowing staff access to company resources such as email and documents via personal devices, such as smartphones, tablets, and laptops. But in a situation where the employee owns the device and keeps their personal software and data on it as well as the company data, employers have to be very clear about what appropriate use of that data is and how the company will protect it. Depending on the tools in place, that policy might reserve the right to erase all data on a device, should it be lost or stolen. In most cases, the company will also reimburse all or some of the data charges. Allowing staff to use personal devices without a policy in place could result in some difficult situations, including legal liability.

Resources

BYOD Policy Template (CommunityIT)
BYOD policy: An in-depth guide from an IT leader (Dialpad)
QUESTION

**Strategy for data collection**

Do you have a strategy for your data collection and priorities?

Your organization’s answer is at **significant risk**

**Categories**

<table>
<thead>
<tr>
<th>Data</th>
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<tr>
<td>Program</td>
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<td>Strategy</td>
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**What does this mean?**

More data is not necessarily better. It is more important that you are collecting the right data to inform your work. Having a strategy for data collection can help you ensure not only that you’re collecting the data necessary to operate effectively, but that you’re also collecting data that can help you make informed decisions that support your organizational strategies, along with how this data will guide such decisions. This might include the metrics used to determine whether or not to continue a program, but it can also include factors such as the frequency at which you look at particular measures, or how often you revisit the data collected and which items continue to be useful vs. which data you can stop collecting.

**Resources**

- [Crafting Your Data Strategy](#)
- [Data in Collective Impact: Focusing on What Matters (Stanford Social Innovation Review)](#)
- [A Guide to Data Management for Nonprofits: Tools, Resources, and Tips (Ohio University)](#)
- [Data Management (NTEN Course)](#)
- [Develop good data practices (NTEN Course)](#)

**QUESTION**

Cover access and equipment costs of remote work
Do you cover access and equipment costs associated with remote working, including home internet and mobile phone costs? Your organization’s answer is at significant risk

Categories
Budget
Operations

What does this mean?

When considering remote working, organizations need to ensure that staff have all the tools they need to effectively complete their job responsibilities. Just as organizations typically supply hardware such as a laptop, it is important to consider how the associated costs of connectivity are covered as well to ensure that all staff are set up for success.

Resources
Remote Workers and Telecommuting Practices for Nonprofits (National Council of Nonprofits)
The ultimate guide to remote work (Zapier)
Remote employee reimbursement rules by state (Peoplekeep)
Remote-Work Costs: Must Nonprofits Reimburse? (For Purpose Law Group)
The Ultimate Guide to Remote Work Stipends (Compt)

QUESTION
Technology integrated into strategic plan
Does your organization integrate technology into your strategic plan? Your organization’s answer is at significant risk

Categories
Governance
Leadership
Strategy
What does this mean?

Very little is accomplished in your nonprofit without the use of some form of technology. Strategic plans are most effective when technology is integrated into every appropriate part of the plan. If part of your three-year strategic plan is to improve employee morale, there is a role for technology to help you evaluate current morale levels. Do the ways your organization uses or doesn’t use technology contribute to poor morale? Technology could be used to improve morale and keep tabs on it through short automated surveys or other means.

If technology is not mentioned in your strategic plan or is relegated to one goal by itself, your organization will be well served to take the time to thoroughly integrate technology into the plans for achieving your strategic goals.

Resources

Top Five Benefits of Having a Technology Plan
IT Planning and Assessment (NTEN Course)
Nonprofit Strategic Planning: The Ultimate Guide + Examples (Bloomerang)
Nonprofit Technology Strategy: How It Should Relate to Organizational Strategic Planning (Build Consulting)

QUESTION

Staff surveyed on organization’s technology
Do you survey your staff to assess their satisfaction with your organization’s available technology?
Your organization’s answer is at significant risk

Categories
Operations
Staffing

What does this mean?

Technology can have a serious impact on job satisfaction and employee turnover. People who are used to working with standard business technologies are understandably frustrated and downhearted when asked to use outdated, inefficient or broken technologies. Asking staff about their satisfaction can produce good ideas about alternatives to explore, organizations that are doing things in creative new
ways, and suggestions for technology experiments. It can be dangerous for nonprofit leadership to assume that staff will happily take what they are given when it comes to technology. As more digital- and technology-native people enter nonprofits, their expectations for how technology is used organizationally will differ and deserve respect.

Assessment can be formal, conducted during performance reviews or by an online survey for organizations with a large staff, or they can be as casual as leadership making a point of asking each staff member about this over the course of a week or so. Sometimes it is helpful to have an outside consultant survey staff confidentially or anonymously to ensure they are as forthcoming as possible.

**Resources**

- [Wondering how your staff feels about the new office technology? (NTEN)](#)
- [New Research Shows Employee Satisfaction Boosted by Superior Work Technology (Salesforce)](#)
- [Staff Technology Survey (Roundtable Technology)](#)

**QUESTION**

**Leadership shares technology experience with other organizations**

To what degree does your organization’s leadership share best practices or other information about your technology experience with other organizations?

Your organization’s answer is at **significant risk**

**Categories**

| Leadership |

**What does this mean?**

The best information about technology comes from people who have real-life experience with that technology. They can tell you what it is like when the rubber hits the road. Salespeople and vendors are notoriously poor sources of accurate information about the drawbacks and limitations of their products. Some contractors favor specific tools not because they are right for your organization, but because that is the technology they are familiar with.

Just as you should seek out and share information from trusted colleagues, board members, and other nonprofit staff about their experience with technology tools and
services, it is valuable for you to share your experience. By sharing your technology experiences at meetings, trainings, conferences, and other gatherings, you are helping other organizations make better decisions and avoid costly mistakes. Next time they may be the ones helping you act more wisely and save money.

**Resources**

- NTEN Community Groups
- NTEN Tech Clubs
- Nonprofit Technology Conference

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**QUESTION**

**Review how peer organizations use technology**

To what degree do you review how other organizations or industries are using technology to address the challenges faced by your organization?

Your organization’s answer is at

**significant risk**

**Categories**

- Leadership
- Professional Development

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**Resources**
QUESTION

Website monitored for inappropriate activity
Are your websites closely monitored for inappropriate activity from external parties, such as hackers?
Your organization’s answer is at significant risk

Categories

Security
Websites

What does this mean?

Everyone is a target for hacking. Even if you don’t consider any of your data to be valuable or sensitive, your systems and resources are! A standard spamming and phishing technique is to use hacked computers to host malware. If you have standard network security tools in place, such as servers, routers, and firewalls, they typically have logs of all attempted access, and most likely some alerting features. And plenty of applications are available that monitor all of your system logs and can alert you when breaches are attempted or occur.

Resources

IT Security Fundamentals (NTEN Course)
Website security for nonprofit decision-makers (NTEN Course)
30 Best Network Monitoring Tools & Software For 2022 (Phree site)

QUESTION

Comprehensive password policy
How comprehensive is your password policy for staff computers and accounts?
Your organization’s answer is at significant risk

Categories

Policy
Security

What does this mean?

The latest thinking about password security is changing, but one thing is clear: Having no password policy is an invitation to be hacked. Staff must be careful to set sufficiently strong passwords, change them when they are no longer secure, and use them only once, not on multiple sites. Ideally, staff will use software to track their numerous passwords. Smart organizations are purchasing single sign-on software, which makes accessing all of the office’s cloud-based services automatic, with passwords securely stored. Alternatively, applications like 1Password, Dashlane, and LastPass can similarly manage passwords so that staff can maintain numerous, secure passwords without having to memorize all of them. You should also use multi-factor authentication, which verifies that the person typing in the password is your employee, not some random hacker.

Current thinking holds that 15- to 30-character passphrases, even if they are all dictionary words, are safer than shorter, one-word passwords with mixed case, numbers, and characters. Making passwords harder to remember and requiring that they are frequently changed does not make organizations more secure. A better practice is to pay attention to when breaches are announced and change your passwords promptly when and where that happens.

Resources

Everything You Need to Know About Using a Password Manager (Phree Site)
The basics of multi-factor authentication and single sign-on (NTEN)
Passkeys, Password Manager, and Two Factor Authentication: Tips for Keeping Your Nonprofit Secure (Media Cause)

QUESTION
Key business systems are integrated
To what degree are your key business systems integrated?
Your organization’s answer is at significant risk

Categories
Data
System Integration
What does this mean?

The average nonprofit has numerous databases that store information. You may have a fundraising system, used primarily by your development department, as well as an advocacy system in communications. Both will track constituents. If they are not integrated in some fashion, you can wind up with duplicate and conflicting information. Besides, tracking the same constituents in different systems is inefficient. Ideally, your databases will be integrated in ways that allow for all data to be entered only once, by the person most qualified to work with the data. You should have integration methods in place that appropriately copy or share the data with other systems.

Resources

Tip of the Day: Integrating Constituent data (Idealware)
7 Reasons Fundraising Software Should Integrate with Other Applications (Classy)
5 Ways to Improve Data Integration (Brightvine Consulting)
Collected Voices: Data-Informed Nonprofits (NTEN)
For stronger fundraising, invest in data stewardship | NTEN

QUESTION

Able to meet accommodation requests

How often are you able to make technical adjustments to meet accommodation requests by staff or constituents?

Your organization’s answer is at significant risk

Categories

Digital Inclusion
Equity

What does this mean?

When your organization receives a request for a certain change, accommodation, or accessibility support, it is important that you have a process for understanding the need, accessing budget related to accessibility and technology needs, and implementing the adjustments in a timely and appropriate manner. If those accommodations are not an option, there should be clear information about why and how that may change in the future. All current and future staff should be able to
access the supports they need in order to be successful at their job, and staff should not have to cover the costs for those accommodations themselves. Similarly, community members who make requests should be supported in engaging or participating with your organization successfully.

**Resources**
The ADA: Your Responsibilities as an Employer  
Digital literacy and accessibility (NTEN Course)  
Improving accessibility in nonprofit workplaces (NTEN Course)  
Why Digital Accessibility Matters for Nonprofits (TechSoup)  
Remote Technology in the Pandemic: Rebalancing Toward Equity and Access (Nonprofit Quarterly)

**QUESTION**
Constituents included in technology planning and decision-making
How often do you include constituents in planning and decision-making processes for technology projects?
Your organization’s answer is at significant risk

**Categories**

- Equity
- Governance

**What does this mean?**

If community members will interact with or be impacted by a technology decision the organization makes, they should be included in the process to ensure you can understand needs, desires, concerns, and even use cases that you would otherwise not know as a staff person. This does not mean that every constituent needs to be consulted about every technology decision. There are many ways to gather input from community members to support your technology project planning, decision making, and implementation including surveys, focus groups, and even longer term committees. Be sure to include constituents who have a diversity of experiences with the organization including those newer to the community and those who have a longer history, those who have not needed support and those with disabilities or other accommodation needs, and so on.
QUESTION

**Digital and technology-supported programs are accessible**

To what degree are your technology-supported or digitally-provided programs, services, and events accessible to those with disabilities including those with visual, sensory, and hearing disabilities?

Your organization’s answer is at

**significant risk**

**Categories**

- Digital Inclusion
- Equity
- Program

**What does this mean?**

Hosting programs or events online does not make them accessible. Community members with disabilities may rely on assistive technologies including those that help them interpret and interact online including screen readers, text-to-speech, screen magnifiers, and software that limit or remove sound, video, or changing colors. Many organizations use third-party systems for online events and services, so the organization may have little to no control over the available accessibility features. This is why it is important to consider accessibility from the start and ensure you are selecting and using systems where your community will interact with you that are accessible to everyone.

**Resources**

- [Introduction to Web Accessibility (Web Accessibility Initiative)](#)
- [US General Services Administration Government-wide IT Accessibility Program](#)
- [WebAIM: Web Accessibility In Mind](#)
- [Digital literacy and accessibility (NTEN Course)](#)
- [Improving accessibility in nonprofit workplaces (NTEN Course)](#)
- [An Accessibility & Inclusion Checklist for Virtual Events (Forum One)](#)
QUESTION

**Website is accessible**

To what degree is your website accessible for those with disabilities including those with visual, sensory, and hearing disabilities?

Your organization’s answer is at significant risk

**Categories**

Digital Inclusion
Equity
Websites

**What does this mean?**

Your website needs to be properly coded and designed so that everyone who visits your website is able to easily and reliably read your content, sign up, or donate. Many websites include basic navigational, design, or content mistakes that make it difficult or even impossible for those with visual, sensory, or hearing disabilities to engage, and a challenge for those using assistive technologies like screen readers to understand or find information. For many organizations, it is possible to make significant improvements in accessibility of their website by making adjustments that need little to no coding, including using standard styling, clear navigation, and adding alt text to images. Depending on your location, there may be laws or regulations that require adherence to accessibility standards, like Section 508 in the US.

**Resources**

- Introduction to Web Accessibility (Web Accessibility Initiative)
- US General Services Administration Government-wide IT Accessibility Program
- WebAIM: Web Accessibility In Mind
- Web Accessibility: 5 Smart Designs to Engage Everyone (Association TV)
- 5 Tips for Making Your Website Accessible (TechSoup)
- Making the Web Accessible: Color Choices (Media Cause)

QUESTION

**Business continuity for marketing and communications technology**
To what degree are you prepared to continue to operate if a staff member responsible for marketing or communications technology leaves the organization (e.g., processes documented, backup staff trained)?

Your organization’s answer is at significant risk

Categories

Operations
Staffing

What does this mean?

Turnover happens at every nonprofit. Organizations that prepare for it save time, resources, and aggravation. Be prepared for turnover by having a plan that lists all of the actions needed when turnover happens. For example, you’ll need to change account access permissions, ensure you have all data and files created by the employee, and collect any devices owned by the organization. A thorough checklist prepares you to deal effectively with turnover and not miss any critical steps.

Resources

Nonprofit Technology Planning for Disasters (And Turnover) (John Kenyon
Prepare for Employee Turnover with a Foolproof Exit Checklist (Directive blog)
Cost of Employee Turnover Calculator (Nonprofit Leadership Alliance blog)
Nonprofit Technology Planning for Disasters (And Turnover) (John Kenyon

QUESTION

Access to historical constituent data

Do you have a complete, accurate history of information regarding donors, volunteers, partners, clients or program participants, and other constituents?

Your organization’s answer is at significant risk

Categories

Data

What does this mean?

After people, data is your nonprofit’s most important resource. Without current and historical data on your community members, your efforts to fundraise, advocate, and
deliver on your mission are severely hampered. Make every effort to ensure that you maintain current, accurate data and that historical data is treated with the respect and care it deserves. Data entry is not the least important activity in your organization. It is the most important activity.

Make sure you have the technology tools to store the kinds of information essential to making good decisions, cultivating donors, engaging volunteers, and everything else your nonprofit does. Ensure that staff is well trained on those tools and that you use thoughtful business processes around gathering, entering, storing, presenting, and reporting on data.

Resources

Ten Nonprofit Technology "Commandments" (John Kenyon blog)
Design your way to efficient data management | NTEN
Data management (NTEN Course)
Develop good data practices (NTEN Course)
A Lightweight (and Fun!) Approach to Data Governance (Association Analytics)

QUESTION

Program delivery data in a managed business system

Roughly what proportion of data related to program delivery is controlled in a managed business system (vs. stored in ad hoc spreadsheets, documents)?

Your organization’s answer is at

significant risk

Categories

Operations
Program

What does this mean?

While there are exceptions, generally the higher the proportion of your data you keep in a managed business system, the better off your data will be. Having data in multiple separate systems that don’t talk to each other creates a host of problems. Instead of updating a person’s address or phone number in one place, you must update it in every place that contains that information. Usually, that doesn’t happen across all data sources, so outdated, inaccurate information remains. This can cause problems with sending emails or direct mail to addresses that no longer exist, to
people who are deceased, or to people who no longer want to hear from you, which can result in legal action. The goal is not to have all your data in one piece of software; donation and financial software systems need to be kept separate to be correctly audited. The goal is to create processes, either automated or human, that allow your data to be reconciled across different systems.

**Resources**

*Using Technology to Communicate with Your Nonprofit’s Beneficiaries (TechSoup)*

*10 questions you need to ask when considering a new CRM (NTEN)*

*What is a Database and How Do I Get Started (Nonprofit New York)*

*10 Tips To Mastering Nonprofit Database Management (Springly)*

*Digital Transformation for Nonprofits: Secrets to success and next steps (Nonprofits Decoded)*

*Five Ways To Improve Data Integration (Brightvine Solutions)*

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**Tech Adoption Scale**

Your Tech Accelerate report includes Tech Adoption Scores based on 4 categories:

**Leading**

You recognize that technology is an investment in your mission.

**Operating**

You have stable infrastructure and a set of technology policies and practices.

**Functioning**

You have basic systems in place to meet immediate needs.

**Struggling**

Your time and budget generally go towards creating work-arounds. Organizations of all sizes and budgets are equally able to achieve any stage of the scale. Learn more about the four categories of the Tech Adoption Scale.

**Risk assessment**

Each question has a priority ranking based on risk for your organization to help you quickly identify which areas need the most attention and investment. Learn more about the risk assessment levels.
**low risk**
You can continue to improve but have minimized most risk.

**medium risk**
Be sure improvement here is on your near-term roadmap.

**significant risk**
Immediate investment or improvement is necessary.