

FREE TEMPLATE

Digital Transformation Readiness Check

For NGOs and networks: nine lessons, 27 statements, your profile and your next three steps.

1. About this check

Organization _____

Scope (organization, program or office) _____

Completed by (names, roles) _____

Date _____

2. How to use it

- 1 Fill it in as a group.** Program, data or IT, and operations people in one room, not one person alone.
- 2 Rate each statement from 1 to 4** and note the evidence: a document, a practice, an example.
- 3 Add the three ratings of each lesson** (3 to 12) and copy the totals into your profile on page 2.
- 4 Pick three lessons** where a step forward matters most for your programs, and plan one step for each.
- 5 Repeat in 6 to 12 months** with the same statements, so the change shows.

3. The scale

1 Not yet

Nothing in place, or only an intention.

2 Started

A first step in one team, or only on paper.

3 Mostly

In place for most teams and used routinely.

4 Embedded

In place everywhere, reviewed and improved.

4. Rate each statement

Statement	1	2	3	4	Evidence / notes
Lesson 1. Start from the program question, not the technology Total _____ / 12					
Every digital initiative names the program question or decision it serves.	☐	☐	☐	☐	
Program teams, not only IT, propose and rank digital priorities.	☐	☐	☐	☐	
We have stopped an initiative because it did not serve a program need.	☐	☐	☐	☐	
Lesson 2. Give teams a maturity path, not a mandate Total _____ / 12					
We describe what basic, good and advanced digital practice looks like.	☐	☐	☐	☐	
Each office or team knows its current stage and its next step.	☐	☐	☐	☐	
Support is matched to each team's stage, and teams move at their own pace.	☐	☐	☐	☐	
Lesson 3. Measure use, not launches Total _____ / 12					
Every tool has a measure of use agreed before launch, not just a launch date.	☐	☐	☐	☐	
We review use at least every quarter and act on what we see.	☐	☐	☐	☐	
We retire tools that are not used, and say why.	☐	☐	☐	☐	
Lesson 4. Put AI policy before AI platforms Total _____ / 12					
We have a written AI policy, or agreed good practice, that staff know.	☐	☐	☐	☐	
Staff know which AI tools are approved and what data may go into them.	☐	☐	☐	☐	
One person is responsible for AI, and its risks are reviewed regularly.	☐	☐	☐	☐	

This check is for planning, not a report card: an honest 1 with a clear next step is worth more than a 3 nobody believes.

FREE TEMPLATE

Digital Transformation Readiness Check

For NGOs and networks: nine lessons, 27 statements, your profile and your next three steps.

4. Rate each statement (continued)

Statement	1	2	3	4	Evidence / notes
Lesson 5. Fix data quality before dashboards					Total _____ / 12
Each key indicator has one definition and one owner.	☐	☐	☐	☐	
Data is checked for completeness and accuracy before it is reported.	☐	☐	☐	☐	
The people who enter data get it back in a form they can use.	☐	☐	☐	☐	
Lesson 6. Reuse and buy before you build					Total _____ / 12
Before building, we check what already exists in the sector and on the market.	☐	☐	☐	☐	
Budgets include the full cost: licenses, maintenance, support and training.	☐	☐	☐	☐	
We share what we build or learn with peers.	☐	☐	☐	☐	
Lesson 7. Build an ecosystem, not one central project					Total _____ / 12
Staff across offices meet in a community of practice to share what works.	☐	☐	☐	☐	
Local teams can adapt shared solutions without starting from zero.	☐	☐	☐	☐	
A solution that works in one office is picked up by others.	☐	☐	☐	☐	
Lesson 8. Invest in people and change, not only in tools					Total _____ / 12
Every rollout has a budget for training and support, not only for the tool.	☐	☐	☐	☐	
Leaders and the board use digital and AI tools with confidence.	☐	☐	☐	☐	
Each team has a named champion who helps colleagues.	☐	☐	☐	☐	
Lesson 9. Partner with the private sector on clear terms					Total _____ / 12
Partnerships set out data use, exit and the cost after any free period.	☐	☐	☐	☐	
We can export our data in a usable format at any time.	☐	☐	☐	☐	
Free or discounted offers pass the same checks as paid ones.	☐	☐	☐	☐	

5. Your profile

Lesson	1	2	3	4	5	6	7	8	9
Total (3 to 12)									
Top three (tick)									

6. Your next three steps

Next step	Lesson	Owner	By when

Read the profile, not a grand total: a 10 on tools next to a 4 on data quality is a warning, not an average of 7.