

FILLED-IN EXAMPLE

Digital Transformation Readiness Check

Horizon Child Fund, whole organization, October 2026 (a fictional organization)

1. About this check

Organization

Horizon Child Fund (fictional)

Completed by (names, roles)

Amina Odhiambo, with the program, IT and finance leads

Scope (organization, program or office)

Whole organization, four country programs

Date

20 October 2026

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 6 / 12					
Every digital initiative names the program question or decision it serves.	☐	☐	☒	☐	Proposals state the goal
Program teams, not only IT, propose and rank digital priorities.	☐	☒	☐	☐	IT sets most priorities
We have stopped an initiative because it did not serve a program need.	☒	☐	☐	☐	Nothing stopped yet
Lesson 2. Give teams a maturity path, not a mandate Total 5 / 12					
We describe what basic, good and advanced digital practice looks like.	☐	☒	☐	☐	Draft levels for 3 themes
Each office or team knows its current stage and its next step.	☒	☐	☐	☐	Offices not placed yet
Support is matched to each team's stage, and teams move at their own pace.	☐	☒	☐	☐	Same training for all
Lesson 3. Measure use, not launches Total 4 / 12					
Every tool has a measure of use agreed before launch, not just a launch date.	☒	☐	☐	☐	Launch dates only
We review use at least every quarter and act on what we see.	☐	☒	☐	☐	Reviewed once a year
We retire tools that are not used, and say why.	☒	☐	☐	☐	Two unused tools still paid
Lesson 4. Put AI policy before AI platforms Total 4 / 12					
We have a written AI policy, or agreed good practice, that staff know.	☐	☒	☐	☐	Good-practice note, 2025
Staff know which AI tools are approved and what data may go into them.	☒	☐	☐	☐	No approved list
One person is responsible for AI, and its risks are reviewed regularly.	☒	☐	☐	☐	No owner yet

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.

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4. Rate each statement (continued)

Statement	1	2	3	4	Evidence / notes
Lesson 5. Fix data quality before dashboards					Total 5 / 12
Each key indicator has one definition and one owner.	☐	☒	☐	☐	5 of 20 KPIs defined
Data is checked for completeness and accuracy before it is reported.	☐	☒	☐	☐	Checks in 2 of 4 countries
The people who enter data get it back in a form they can use.	☒	☐	☐	☐	Reports go up, never back
Lesson 6. Reuse and buy before you build					Total 7 / 12
Before building, we check what already exists in the sector and on the market.	☐	☐	☒	☐	Market scan before buying
Budgets include the full cost: licenses, maintenance, support and training.	☐	☒	☐	☐	Training rarely budgeted
We share what we build or learn with peers.	☐	☒	☐	☐	Shared once a year
Lesson 7. Build an ecosystem, not one central project					Total 5 / 12
Staff across offices meet in a community of practice to share what works.	☐	☒	☐	☐	Informal focal points
Local teams can adapt shared solutions without starting from zero.	☐	☒	☐	☐	Templates sent by e-mail
A solution that works in one office is picked up by others.	☒	☐	☐	☐	No example yet
Lesson 8. Invest in people and change, not only in tools					Total 7 / 12
Every rollout has a budget for training and support, not only for the tool.	☐	☒	☐	☐	Training at launch only
Leaders and the board use digital and AI tools with confidence.	☐	☒	☐	☐	Director yes, board not yet
Each team has a named champion who helps colleagues.	☐	☐	☒	☐	Champions in 3 of 4 offices
Lesson 9. Partner with the private sector on clear terms					Total 6 / 12
Partnerships set out data use, exit and the cost after any free period.	☐	☒	☐	☐	Data terms, no exit clause
We can export our data in a usable format at any time.	☐	☐	☒	☐	CRM export tested in 2026
Free or discounted offers pass the same checks as paid ones.	☒	☐	☐	☐	Free offers not checked

5. Your profile

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

6. Your next three steps

Next step	Lesson	Owner	By when
Agree a two-page AI policy and a list of approved tools	4	Director of Operations	Dec 2026
Define and assign an owner to the 10 indicators we report most	5	MEAL lead	Jan 2027
Set a measure of use for each of our six tools; review in March	3	IT lead	Mar 2027

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.