Which of the following statements best describes your organization’s *Password and Security Policies*?

- We don’t have password policies - for example, we have not defined a minimum requirement for password strength, or multiple staff members share a single user ID for some of our core organizational systems (e.g. email, constituent databases, website).

- We have password policies - e.g. staff members are encouraged to use unique passwords that are at least 5 characters long, with at least one number and mixed-case letters - but this is not enforced within our core organizational systems (e.g. email, constituent databases, website). Staff members do not share a single account for our systems.

- Core organizational systems (e.g. email, constituent databases, website) require user passwords that follow standard security best practices (minimum 8 characters, mixed-case letters, require at least one number or symbol).

- Two-factor authentication is enabled for core organizational systems (e.g. email, constituent databases, website). Staff members are encouraged to use a password manager (i.e. LastPass or similar).

Which of the following statements best describes your organization’s *Workstations*?

- Staff members must share computers or do not otherwise have access to a workstation.

- All full-time staff members who need one have access to a computer. We have not defined a replacement cycle for computers, and many machines are past recommended replacement dates.

- All full-time staff members who need one have access to an up-to-date computer running a current operating system and we have a plan for keeping them up to date.

- Hardware is standardized for those with similar needs. Individuals have a computer or mobile device that is suited to their role. We regularly replace computers every 3-5 years.
Which of the following statements best describes your organization’s *Internet Access*?

- Internet access is unreliable or nonexistent.
- Most staff members have reliable internet access, but bandwidth/speed is insufficient for our needs.
- All full-time staff members have sufficient internet access.
- All full-time staff members have reliable and fast internet access.

Which of the following statements best describe your organization’s *Network*?

- We have no control of our network – we access the Internet through a shared connection (WeWork, Subleased Office Space).
- We access the Internet through the modem that our provider gave us. We have no dedicated firewall or secure Wi-Fi.
- Our network has a firewall that provides wired and wireless Internet access. Our Wi-Fi is not password protected OR it is protected with a single password for both staff and guests.
- Our network has a dedicated router/firewall that provides access to the Internet. Our Wi-Fi is on a separate network device and is password protected, with separate staff and guest passwords.

Which of the following statements best describes your organization’s access to *Files*?

- We send files through email attachments. Everyone saves files to their own computer.
- We share files through our personal DropBox, Google, or similar accounts and we don’t have a shared network drive.
- We mainly share files through a password-protected network drive on a server (such as P: or S: or G:).
- We use cloud file sharing such as enterprise versions of Office 365, Google Drive or Box with permissions set by our IT professional.
Which of the following statements best describes your organization's **Constituent and Donor Management System(s)**?

- We do not have a database to manage information about donors or other constituents; We use Excel.

- We have a database for recording supporters and donations, but it's difficult to use and staff members won't use it.

- Our constituent database(s) is up-to-date, but it's hard to use or time-consuming to find the information we need.

- Our constituent database is up-to-date and all staff members can easily and quickly run reports or queries and enter new donations or supporters.

Which of the following statements best describes your organization's **Data Quality Processes**?

- We do not have a plan or set of guidelines for ensuring that data in entered correctly and consistently. Data is a mess and we don’t trust it.

- We know how to correctly enter data for new constituents, but no one is responsible for enforcing these formats.

- We have defined the correct formats for how users should enter constituent data, but older records are still inconsistent.

- We have defined the correct formats for how users should enter constituent data, and who is responsible for data quality for each of our databases. We have processes for finding and correcting mistakes.

Which of the following statements best describes your organization's **Data Integration**?

- We do not have a database to track constituent data; We use spreadsheets or paper records.

- We use a separate database to track each type of constituent and these systems are not connected. We cannot easily see who is both a donor and a volunteer, for example.

- We use a single database or integrated CRM system and can easily see all the ways a single constituent has interacted with us in the past.

- We use use a single database or integrated CRM to not only keep a history of interactions but also to forecast, improve fundraising results, deepen engagement, etc.
Which of the following statements best describes your Organization Website?

- We do not have a website; We do not have the ability to update our website.
- We have a website, but the content is out-of-date and/or does not represent our organization in a professional way. We must contact our web designer/contractor to make changes to our website content.
- Our website represents our organization in a professional and polished way. Most staff members can update the content on our website without knowledge of HTML.
- Our website is professional, staff can update it, and it is easily accessible from mobile devices and by visitors using screen readers. All staff members can easily update the content on our website without knowledge of HTML.

Which of the following statements best describes your organization’s Broadcast Email?

- Emails to groups are sent through organization email accounts, as blind carbon copies.
- We have a software package specifically designed to send email to thousands of people at once, but we have problems with email not being delivered to recipients.
- We have a software package specifically designed to send email to thousands of people at once and there are few deliverability problems. Emails are sent using the vendor’s servers, protecting us from blacklisting.
- We have a software package specifically designed to send email to thousands of people at once, and we test and optimize our email messages.

Which of the following statements best describes your organization’s Online Forms?

- We cannot collect constituent data or donations online.
- We can collect constituent data or registrations online, but this is not automatically pulled into our database(s).
- Constituent data or donations collected through forms on our website are automatically pulled into our database.
- Constituent data or donations collected through forms on our website are automatically pulled into our database and our donors and other constituents can manage their own data through a portal on our website.
Which of the following statements best describes your organization’s *Intake Process for Program Participants (clients, members, patrons)*?

- We do not have an electronic system for recording new participants.
- We have an electronic system to record new participants, but we still use paper intake/ sign-up forms, and enter them into the system later.
- We record all new participants in an electronic system at sign-up or arrival.
- New program participants can register themselves through a self-service intake process (e.g. online forms, kiosk).

Which of the following statements best describes your organization’s *Messaging to Program Participants*?

- Contact information for program participants is out-of-date or non-existent.
- We can only record a single point of contact for program participants, which is usually not their preferred method of contact. There is difficulty reaching constituents.
- We capture contact information and we can usually reach participants with communications about our services.
- We can easily reach participants using their preferred method of contact (e.g. texting, email).

Which of the following statements best describes your organization’s ability to *Manage Available Services* (e.g. inventory, hours available to meet, training seats, services provided, etc.)?

- We can only view our goods or services by invoice/ orders, but do not know what is currently available.
- Available services/ hours/ goods are recorded electronically, but we have difficulty finding what is currently available.
- We have a system to track and manage the goods and services we currently have available.
- We can easily see available services/ hours/goods, with quantities updated in real-time.
Which of the following statements best describes your organization's Remote Service Delivery (e.g. Skype consultation, live streaming, virtual reality)?

☐ The only way to access services or participate in programs is in person.

☐ We have begun experimenting with virtual or remote programs.

☐ We have a virtual or remote program, but it has not yet caught on with our constituents.

☐ Remote services are a thriving part of our program that is extending our reach and maintaining high quality of service.

Which of the following statements best describes your organization’s Technology Plan?

☐ We do not have a technology plan.

☐ A plan for upgrades and replacements exists but is not linked to strategic plan.

☐ Technology staff has a limited role in the strategic planning process and technology is directly mentioned as a tool throughout the organization’s strategic plan.

☐ Technology staff has a direct role in the strategic planning process and is integrated throughout the plan.

Which of the following statements best describes your organization’s Technology Budgeting?

☐ We have not allocated any funds in our budget for technology.

☐ Limited funds are dedicated to replacement.

☐ Funds are dedicated to replacement and technology is upgraded on a regular schedule.

☐ A dedicated technology budget exists for replacement, upgrades and new technology investment. Funds are set aside annually for large investments (e.g. website redesign, new constituent database).
Which of the following statements best describes your organization's Technology Culture?

- We are fearful of technology and unaware of what is available or how it can help us.
- Technology is a fact of life. Staff members might resist technology changes, but eventually they get on board.
- Technology is promising and we are trying to learn more about how we can use it well. There is a deliberate implementation and user adoption process whenever we add new technology.
- Staff members are excited to try new technology tools and suggest innovative uses of technology. We see our organization as a technology leader. Technology is the key to our success.

Which of the following statements best describes your organization's Staff Training and Support?

- We do not have resources to help train and support staff members on our technology. Employees are expected to find and read manuals or training resources on their own.
- We have some technology policies and instructions but no formal training. Our technology policies are written down in the employee handbook or in another shared document for staff members to look up on their own.
- New staff members are trained on organization technology policies and how to use each of our core systems (e.g. email, constituent databases, website) as part of orientation.
- New staff members receive training and we hold regular staff meetings to cover our technology policies. On-going training is available (in-house or from the vendor) for how to use our core systems (e.g. email, constituent databases, website). Staff are accountable for mastering our technology systems.