

A Framework to Evaluate Social Good Technology

Fill out this worksheet to evaluate your current systems and watch the [WEBINAR](#) for in-depth insight from two industry experts. *Before your start, choose File > Save As and rename the file* For help, email connect@socialsolutions.com

1 WRITE OUT THE **TECH STACK** FOR YOUR ENTIRE ORGANIZATION.

case management	<input type="text"/>
volunteer management	<input type="text"/>
online donation management	<input type="text"/>
donor management	<input type="text"/>
funder reporting system	<input type="text"/>
client communications	<input type="text"/>
internal communications	<input type="text"/>
teleconferencing	<input type="text"/>
payment processing	<input type="text"/>
visualization tools	<input type="text"/>
other	<input type="text"/>



2 LIST ALL THE **PROGRAMS** WITHIN YOUR ORGANIZATION.

program 1	<input type="text"/>
program 2	<input type="text"/>
program 3	<input type="text"/>
program 4	<input type="text"/>
program 5	<input type="text"/>
program 6	<input type="text"/>

3 WRITE DOWN THE **REPORTING WORKFLOW** FOR ALL YOUR PROGRAMS.

**If you are using Adobe Reader, your programs should self-populate*

sample program	case management software → excel → PIR reporting system	<input type="checkbox"/>
	<input type="text"/>	<input type="checkbox"/>
	<input type="text"/>	<input type="checkbox"/>
	<input type="text"/>	<input type="checkbox"/>
	<input type="text"/>	<input type="checkbox"/>
	<input type="text"/>	<input type="checkbox"/>
	<input type="text"/>	<input type="checkbox"/>

4 MARK THE PROGRAMS THAT **DO NOT** HAVE AN **OUTCOMES-BASED TRACKING SYSTEM** (I.E., EXCEL OR PEN/PAPER).



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SYSTEM CAPABILITIES MATRIX

Now that we know what we're working with, let's see if there are any opportunities for improvement. Mark the capabilities that you already have built into your current systems:

DATA SECURITY	DATA ACCESSIBILITY	BUILT-IN BEST PRACTICES	PARTICIPANT ENGAGEMENT	TRACK TOWARDS OUTCOMES
HIPAA compliant system	Staff at all levels see what is most important to their role first	Systems are an intuitive addition to day-to-day processes	It is easy and intuitive to request services from a computer or mobile phone	The organization doesn't just track outputs but truly works towards desired outcomes
FERPA compliant system	Staff can pull up relevant client details quickly in the office or from the field	There is a <i>single source of truth</i> for client data, staff and volunteer management, and grant tracking	Clients can complete intake, forms and assessments from a computer or mobile phone	Programs utilize industry leading assessments and logic models to demonstrate impact
Data access can be restricted to a staff member's caseload	Leadership is notified based on internal logic when their approval or input is needed	Easily track and report on funder requirements with a high level of integrity	Seamlessly ask and get feedback from your clients about services they received	Easily generate reports to show an individual's progress over time in a program
Data access can be restricted to a staff member's site location	What and how data is collected is easily configurable to meet changing program needs	Staff are notified when a client shows an indication of increased need, so that they can act responsively	Clients can see progress over time, empowering them to be advocates of their own success	Easily generate reports that compare multiple participants in the same program
Data system has multi-factor authentication	Data can be pulled in or out of the system easily and can be automated with other reporting systems	There are safety measures in place so clients don't "fall through the cracks"	Clients can e-sign off on goals, service plans and can give their consent easily and intuitively	Easily aggregate reports across multiple sites and programs to show the overall impact of your organization

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ADD UP YOUR MARKS TO SEE HOW MANY CAPABILITIES YOUR SYSTEM CURRENTLY HAS IN EACH SECTION




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Many social good organizations find themselves stuck in a convoluted technology stack that often takes away valuable time spent on their mission. Now that we have discovered what you have and what you may be missing, let's see how goals, mission and vision fit into the framework. The following questions will help you make sure your initiatives and systems have mission at the heart of it:

7 WRITE YOUR ORGANIZATION'S MISSION HERE.

8 WRITE DOWN YOUR ORGANIZATION'S TOP 3 STRATEGIC GOALS

goal 1		<input type="radio"/>
goal 2		<input type="radio"/>
goal 3		<input type="radio"/>

* Mark if the goal could be achieved more efficiently with technological capabilities outlined on the previous page 

9 WHAT ARE 3 PAIN POINTS IN YOUR SYSTEMS THAT ARE CAUSING INEFFICIENCIES?

Refer to the matrix on the previous page to help you identify potential weak spots. Write them here and quantify them if possible through time or money spent:

pain point 1	
pain point 2	
pain point 3	

10 CAN TECHNOLOGY ADVANCE YOUR MISSION AND INCREASE IMPACT?

Revisit the matrix on the previous page and identify which capabilities would be most beneficial to your organization. Then frame how these would help you make more impact in your community below.

capability 1		impact	
capability 2		impact	
capability 3		impact	

We would love to help you on your journey, whether our all-in-one platform is a good fit for you or not. Have your filled out worksheet ready, and click to claim your free 30-minute technology consultation.