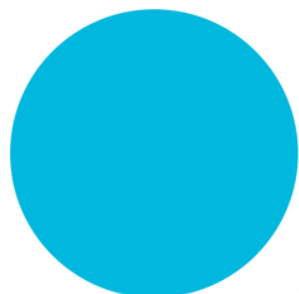


DIGILEAD Output 1

techsoup
EUROPE

Methodology of Training for Nonprofit Leaders: Digital Transformation

Trainers Guide and Training Outline



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Project leader:

 Fundacja TechSoup

Project Partners:

 Fondacija Mozaik
KREIRAMO DOBRU EKONOMIJU

 Les Ateliers du Bocage

 **Haus des Stiftens** Haus des Stiftens gGmbH
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Introduction

Tech is disrupting every sector. From space travel to helping the poorest of the poorest in warzones. Complete digital transformation of social sector is “the Next Big Thing” which is coming inevitably to change the organizations which focuses on work with the marginalized groups of our society (Horizon Report 2018). The buzz is not only about social media, but it includes crowd-funding, Internet of Things, artificial intelligence, augmented reality and even drones helping boost educational activities of the social sector (TechCrunch 2018).

While digital change is already here, European NGOs are lagging behind in digital transformation and moreover the leadership of European NGOs in digital is severely lacking. The ICT4NGO project research shows a massive misunderstanding of the role and trends in digital among the leadership of NGOs. In order to tackle this issue, TechSoup Europe, together with partners Fondacija Mozaik from Bosnia and Herzegovina, Les Ateliers du Bocage from France, Haus des Stiftens gGmbH from Germany and SocialTechno Impresa Sociale srl from Italy is implementing project DIGILEAD - Advancement of Digital Transformation of Social Sector with the Use of Open Badges Recognition System. The project aims at the creation of a framework for digitally competent NGO leaders. The specific objectives one and two of the project focus on the development of the digital transformation competences of senior staff and management in the non-governmental sector.

This Trainers Guide and Training Outline is a part of the Advanced Methodology of Training Nonprofit Leaders about Digital Transformation, an innovative and unique course, which directly targets NGO senior staff and management.

The Advanced Methodology of Training Nonprofit Leaders about Digital Transformation consists of 2 parts:

Part 1: Theoretical Handbook that provides theoretical input for participants of the training and cover topics related to digital transformation, digital competencies of senior staff and management, as well as a unique insight into TechSoup’s Digital Transformation Initiative.

Part 2: Trainers Guide and Training Outline is a tool designed to support trainers and educators in running training activities on digital transformation. It contains:

- Learning objectives and learning outcomes,

- Required profile of trainees and trainers,
- Detailed training plan,
- Participant Action Plan template,
- Post-course assessment survey,
- Content for trainer's deck (for further graphic design)

The training outline presented in this document will be the subject of further development in 2 forms of education: 4h long face-to-face workshop and 1h webinar.

Learning Objectives and Learning Outcomes

The participants will have an opportunity to experience, reflect on and broaden their knowledge, competences and attitudes in the area of digital transformation.

By the end of the course participants will:

- Understand what is Digital Transformation
- Recognize the importance of Digital Transformation with all of its benefits for the achievements of organizational goals and mission
- Recognize the risk of delaying the process of Digital Transformation
- Strengthen their motivation to support Digital Transformation process in their organization
- Develop a basic Action Plan for Digital Transformation of their organization

Profile of the Trainer

The trainer's role in running any kind of training activity is to create the learning conditions necessary for developing the knowledge, competences, skills and attitudes of people participating in the training activity.

It is recommended that the trainer facilitating the course for nonprofit leaders on digital transformation fulfill the following profile:

Knowledge

- The trainer knows the concept of Digital Transformation and other related concepts described in the Theoretical Handbook.
- The trainer has a deep understanding of non-profit activities, development, and technology challenges.
- The trainer knows organizations which have successfully implemented elements of digital transformation and knows how to adapt them to the content presented at the training.

Skills

- Experience in a non-governmental organization.
- Experience in facilitating training in an interactive manner.
- High digital skills.

Attitude

- The trainer connects with people easily.

- The trainer demonstrates patience towards people who have less knowledge or weaker digital competences.
- The trainer is curious about the world of the organizations and is interested in getting to know the participants of the trainings.

Profile of the Participant of the Course

- The participant has a leading role, especially on the level of the whole organization. Preferably senior staff and management.
- The participant is engaged in the development of the strategic direction of their organization.
- The participant has influence on the organization's activities. Through their participation in the training, they can bring real change in the organization.
- The participants may represent various levels of digital competences.

Standard Training Preparation

- It is recommended to have 10-15 participants in the group.
- Communication of the training should include: training objectives and expected learning outcomes, expected profile of participants, agenda of the training, trainer's bio.
- The organizer of the training should provide all relevant information no later than 7 days prior to the training, including agenda and logistics:
 - ask participants to fill in online pre-course assessment tool
 - request to bring laptops
 - request to fill in ICT4NGO Assessment Tool. The following invitation can be used:

As a preparation to the training please go to www.ict4ngo.org and fill in the ICT4NGO assessment tool. It is a questionnaire based on open source and free-of-charge materials, providing a virtual learning path and enabling each social sector stakeholders to improve her/his digital competencies using open source materials which are recommended according to their diagnosed skills. This user-friendly tool will benchmark your skills and offer access to personalized recommendations. It takes only 30 minutes to complete the assessment.

Technical Requirements

- 1. Materials and supplies in the training room and room arrangement:**
 - 1 Flip chart board with flip chart paper
 - Flip Chart Markers (These should be in various colors, around 1 piece per participant)

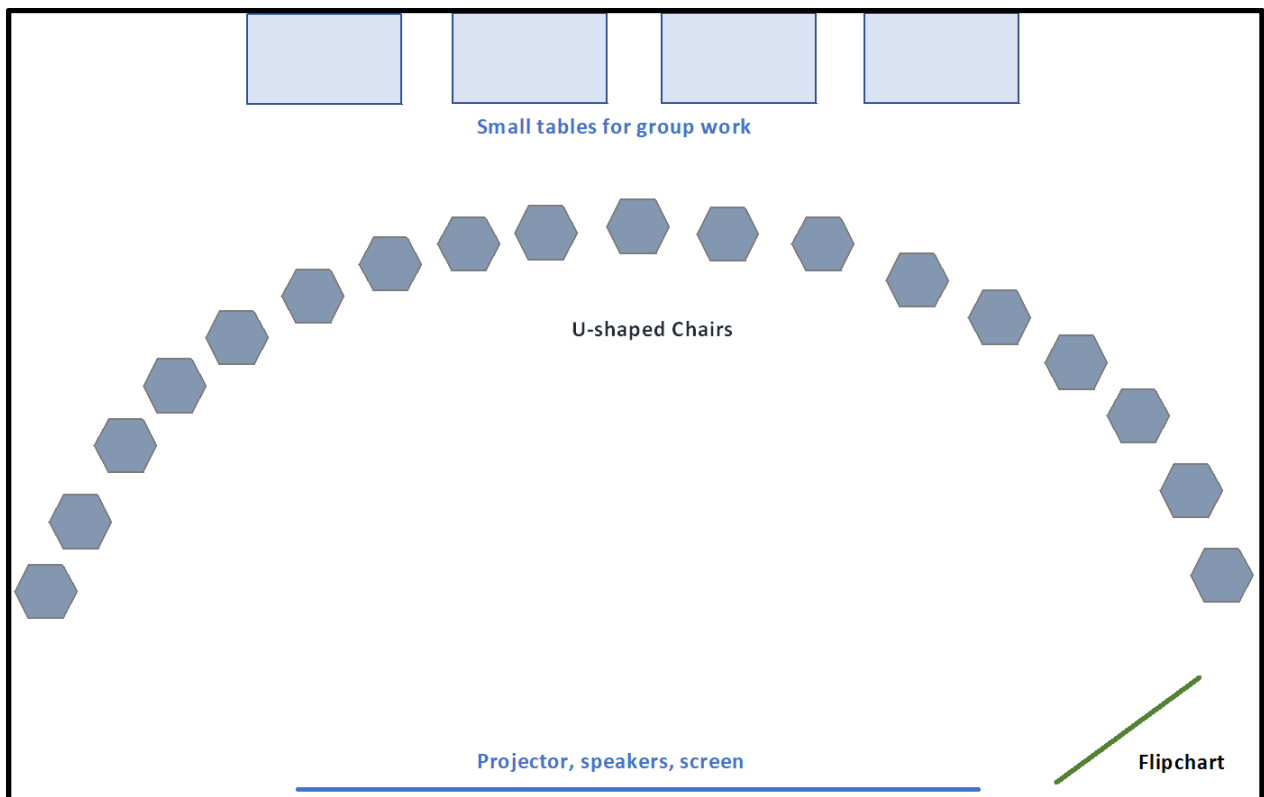
- 1 pen per participant
- 1 projector (beamer) with sound. Check VGA and HDMI connections. Special adapters might be needed.
- An assortment of colored and white paper (A4 paper)
- An assortment of colored post-it notes
- BlueTack /Presstick or tape for putting work up on the walls/displaying work.
- Scissors
- Spare laptop - for the use of participants if needed

2. Coffee break arrangements

- Coffee, tea, small snacks
- Try to avoid single use plastic

3. Standard/recommended room arrangement

- *The venue should ideally be set up in a U-Shape with chairs. As there are activities in smaller groups, there should be no desks in the middle. Several tables in the back of the room would be helpful.*



4. Participants need to bring/prepare: Participants should bring their laptops.

Detailed Training Plan

Note:

- The outline of the training described below can be used to provide 4h face to face training or can be adapted for a shorter 1h online webinar.
- The duration of each module is approximate and depends on the size of the group and their experience.

Time	Procedure	Activity Goal	Slide Numbers
20 min	Module 1 - Introduction		
	<p>Step 1 – The trainer and the Participants Introduce Themselves</p> <ul style="list-style-type: none"> • Organizers welcome participants. • Introduce yourself, then ask the participants to introduce themselves. • Invite them to say a few words about their motivation to take part in the training. • You can use the following questions: <i>What is my name?</i> <i>What is my role in the organization?</i> <i>What is the main scope of work of my organization?</i> <i>Why have I decided to take part in this training?</i> 	Get to know each other.	1-3
	<p>Step 2 – Objectives of the Training</p> <ul style="list-style-type: none"> • Introduce the goals of the training session: The participants will have an opportunity to experience, reflect on and broaden their knowledge, competences and attitudes in the area of digital transformation. <p>By the end of the course participants will:</p> <ul style="list-style-type: none"> • Understand what is Digital Transformation • Recognize the importance of Digital Transformation with all of its benefits for the 	Familiarize participants with training goals.	4

	<p>achievements of organizational goals and mission</p> <ul style="list-style-type: none"> ● Recognize the risk of delaying the process of Digital Transformation ● Strengthen their motivation to support Digital Transformation process in their organization ● Develop a basic Action Plan for Digital Transformation of their organization 		
	<p>Step 3 – Expectations and Needs</p> <ul style="list-style-type: none"> ● Invite participants to share their expectations and needs in the context of the presented goals. 	Get to know participants expectations.	4
	<p>Step 4 – Program of the Training</p> <ul style="list-style-type: none"> ● Present the program of the training. ● Refer to the expectations of the participants, as you discuss the program. ● Present the rules of cooperation and inform the participants how they will receive the training materials (online catalog/by email). 	<p>Familiarize participants the training program.</p> <p>Make references to participants' expectations.</p> <p>Set the rules of cooperation.</p>	5
30 min	Module 2 – How Digital Technologies change Nonprofits?		
15 min	<p>Step 1 – How Digital Technologies have influenced your org?</p> <ul style="list-style-type: none"> ● Ask the participants to name the most important change in their org within the previous years influenced by digital technologies. Think of different areas: planning, operations, managing, marketing, communication, fundraising, finances... <ul style="list-style-type: none"> ○ Who initiated this change? ○ Why was it introduced? ○ How was this change introduced? Intentionally planned? Just happened? ○ What do you do differently? ○ What do you not do anymore? 	<p>Participants are more aware of changes in their orgs that are imposed by digital technologies.</p> <p>Define potential patterns of providing changes influenced by digital technologies.</p> <p>Define the impact that digital technologies</p>	6-7

	<ul style="list-style-type: none"> ○ What has this change brought to your org? ● Collect answers from the participants. Ask additional questions and encourage them to share their experiences. Summarize the opinions you have heard, grouping the similar ones together. 	already have had on participant orgs.	
15 min	<p>Step 2 – Are you a Digital Native or a Digital Migrant?</p> <ul style="list-style-type: none"> ● Explain the meaning of ‘digital migrant’ and ‘digital native’. ● Ask how participants how they define themselves and why? ● Ask about their team? What are the proportions of digital natives and digital migrants in their org? What are the consequences of this situation for your org? ● Refer to the experiences of the participants they shared. ● Explain the importance of digital leadership in affecting the efficiency and effectiveness of nonprofits in achieving their goals and mission. 	Raise participants’ awareness on the link between staff digital competencies, digital leadership and efficiency and effectiveness on nonprofits.	8-10
60 min	Module 3 – The Leader’s Role in Digital Transformation of Nonprofits		
10 min	<p>Step 1 – What is Digital Transformation?</p> <ul style="list-style-type: none"> ● Ask the group: How would you define the term “Digital Transformation of an NGO”? Write down the answers on the flipchart. ● Gather the reflections, sum them up and present the slides with the TechSoup definition. ● Stress that DT is transforming technology, processes, and people. ● Present the definition of DT. 	Build common understanding of DT definition.	11-13
10 min	<p>Step 2 – 3 Layers of the Digital Transformation Framework</p>	Build a common understanding	14

	<ul style="list-style-type: none"> ● Explain the 3 layers of the DT framework: 1. mission, 2. impact strategy, 3. functional capacity (6 categories: Productivity, Security, Communication and Marketing, Operations, Data and Impact Measurement, Innovation). ● Underline that leadership in digital transformation requires looking at each of these areas and defining the current status and needs. 	of TechSoup's DT Framework.	
5 min	<p>Step 3 How is Technology Supporting the Mission of your Organization?</p> <ul style="list-style-type: none"> ● Present 4 categories from the slide. ● Ask participants which type is the most relevant to their organization and why? 	<p>Introduce 4 potential approaches toward technology.</p> <p>Define the situation of the participants' org.</p>	15
10 min	<p>Step 4 – Digital Maturity Model</p> <ul style="list-style-type: none"> ● Present the concept of the Digital Maturity Model ● Ask participants how would they define the level of digital maturity of their organization? Accurate estimation is not crucial. Use participants' answers to discuss and to learn the elements of the digital maturity model. ● Explain that based on the digital maturity of a nonprofit, the approach and plans for digital transformation should be designed. 	Build common understanding of Digital Maturity Model.	16
15 min	<p>Step 5: What is the role of Nonprofit Leaders in the DT process?</p> <ul style="list-style-type: none"> ● Split participants into smaller groups of 3-4 people. ● In groups ask participants to draw a map answering the questions: <ul style="list-style-type: none"> a. What is the responsibility of leaders in the DT process? b. What can be delegated? To whom? How? 	Define the areas of responsibility of NGO leaders in the DT process.	17

	<ul style="list-style-type: none"> Ask the group to write down the model DT responsibility assignment. It can be done in a form of table with 2 columns: <ol style="list-style-type: none"> An NGO Leader has to... An NGO Leader should not... Ask groups to present the results of their work. Wrap-up and summarize the key elements of the role of leaders. 		
10 min	<p>Step 6: How Digitally Savvy Should NGO Leaders be?</p> <ul style="list-style-type: none"> Present 5 areas of Dig Comp 2.0. Ask participants in which areas of digital competencies are they strong? Ask participants which areas of their digital competencies require improvement? Wrap-up and summarize the influence of leaders' digital competencies on their org. 	<p>Assess the digital competences of participants.</p> <p>Identify gaps and directions for personal development.</p>	18
15 min	Coffee Break		
60 min	Module 3 – DT as a Change in the Organization		
5 min	<p>Step 1 – DT as a Change</p> <ul style="list-style-type: none"> Explain briefly that DT is an effort of implementing change in the organization. 	Encourage participants to plan DT as any other change in their org.	19
20 min	<p>Step 2 – What are the Traps in the DT Process?</p> <ul style="list-style-type: none"> Present the slide and explain briefly each of the potential risks: <ol style="list-style-type: none"> Lack of senior management support Lack of consensus on what DT is Wait-and-see trap “What and how” Failure to align tech and talent needs Resistance to change Ask participants if they can relate to any of the described traps in their work. Ask participants what are the possible mitigation measures for each of the risks. Ask participants if they want to add anything else to the list. 	Become aware of potential traps and detractors of DT.	20

35 min	<p>Step 3 – Motivating Staff</p> <ul style="list-style-type: none"> ● Present the slide. Explain that each process of implementing change has its own dynamic: denial, resistance, exploration, adoption. ● On each stage, teams require different support from their leaders. ● Present briefly three reasons why people resist new technologies and new approaches to doing business: <ul style="list-style-type: none"> a. People resist change because they lack the skills/know-how to use and benefit from new technologies. b. In traditional companies, people do not understand the 'big picture' and how new technology would improve business and processes. c. Middle and upper managers resist changes from new technology and new business models as it requires adjustment to new processes in the organization. ● Ask participants to work together on a strategy to engage the team in the DT process. You can suggest working on: <ul style="list-style-type: none"> a. To do list b. Don't do list 	Define possible ways to engage NGO staff in the DT process.	21
35 min	Module 4 – Action Plan and Next Steps		
35 min	<ul style="list-style-type: none"> ● Ask participants to split into pairs. ● Present the handout 'My Action Plan towards Digital Transformation'. ● Give each participant a handout in paper, or ask to fill in on their laptops. ● Ask participants to fill in the Action Plan for their organizations. ● Split participants into pairs. Ask to present their Action Plan to each other. The listener's role is to ask questions, give feedback and give some recommendations. ● Ask the group what are examples of small steps that can be easily implemented. Write down all ideas. Examples: 	<p>Participants create their Action Plans for DT.</p> <p>Participants share their ideas on small steps in the DT process.</p>	22

	<p>1. Create online backup using Google Drive, Box, Dropbox or One drive.</p> <p>2. Start scanning incoming paper documents for easier archiving</p> <p>....</p>		
15 min	Module 5 – Sum Up and Closure of the Training		
	<ul style="list-style-type: none"> • Ask participants to share with the group one action they planned. • Ask the participants to fill in an evaluation online survey. • Ask for final comments and takeaways at the end of the training. 		23
	<ul style="list-style-type: none"> • Inform participants how TechSoup can support NGOs in digital transformation. 		24-25

Handout: My Action Plan Towards Digital Transformation

It is recommended to use an online form, but paper handouts might be an option too, based on a trainer's judgement.

1. My Key Takeaways

The most important reflections, information you want to remember about how to support digital transformation of my organization.

Perhaps you already have something in mind which could be changed or done differently?

Note it down - attention and memory are temporary ;-)

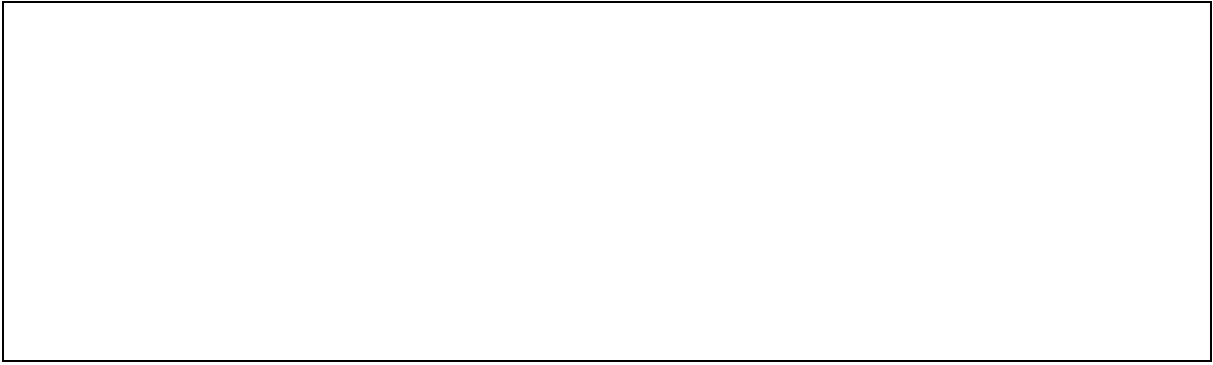
2. Analyzing the context

- **Internal context**

Identify processes within your nonprofit, solutions already implemented and solutions needed (*It doesn't have to be a thorough assessment, this is just your initial step*)

- **External context**

1. Who is around your organization who you can learn from about digital transformation?
2. What important things are happening in your country and in the region linked to digital transformation of NGOs?



3. Who Can Support You?

Step 1: Think about 1-2 members of your team that can support/already support the process of digital transformation of your org.

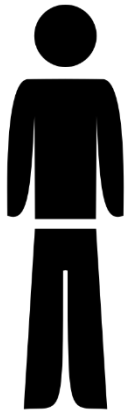
Write down their names:

Step 2: What skills, competencies, experience do they have that is relevant?

Step 3: What role would you like them to play in the digital transformation process? List the responsibilities and tasks for them.

Step 4: What does this person(s) need in order to be engaged in the digital transformation process in your organization?

Step 5: Try to identify who else should be engaged on the team to support the digital transformation of your organization.



4. Reflect on the Impact Strategy

Identify elements of the impact strategy related to the digital transformation that will lead you to the achievement of the organizational mission. Try to identify necessary technologies, solutions, processes and people required for digital transformation that will lead you to more effective and efficient achievement of organizational mission.

5. Next Steps

Based on the previous exercises and reflections, define the next steps in digital transformation of your organization.

Try to formulate your goals according to the SMART rule – the smaller, more specific and realistic they will be, the higher the chances that you will take action.

6. Action Plan – First Steps after the Training

Write down the first three steps you want to take right after the training.

1.
2.
3.

Pre-training Assessment Tool

- Name of your organization
- What is your role in the organization? Please, describe briefly your main tasks and activities.
- What takeaways would you expect from this training?

Post-training Assessment Tool

Post-training evaluation is a tool to measure learning outcomes of the training.

The domains covered by the assessment tool will be as follows:

- *Needs Assessment*
- *Reactions to the training*
- *Learning from the training*
- *Results of the training*

This is a suggested evaluation form that is available as a google form ([LINK](#)) and should be sent to participants after the training.

1. How strongly you agree with the sentence: The training met my expectations and needs.

1 I wouldn't agree at all	2	3	4	5 Totally agree
------------------------------------	---	---	---	-----------------------

Please provide a brief explanation:

2. Which content of the workshop was MOST useful to you?
3. Which content of the workshop was LEAST useful to you?
4. What do you think was missing?
5. How do you assess the training facilitation? Choose a mark on a scale from 1 to 5, where 1 is very poor and 5 is very good.

Clarity of delivery	1	2	3	4	5
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Facilitation	1	2	3	4	5
Expertise of the trainer	1	2	3	4	5
Help during tasks	1	2	3	4	5

Please explain briefly:

6. Will this training impact your work?

YES	NO
Why? Please explain briefly.	

7. Do you have any comments on the organization of the training?

8. Comments, suggestions, reflections – what we didn't ask about and which would be important for us to know.

Trainer's Deck – Suggested Content

No.	Slide Content
1	Digital Transformation for Nonprofit Leaders
2	Introductory Slide on the DIGILEAD project, TechSoup Partners

3	Let's get to know each other!
4	Training Goals <ul style="list-style-type: none"> ● Understand what is Digital Transformation ● Recognize the importance of Digital Transformation for the achievement of organizational goals and mission ● Recognize the risk of delaying the process of Digital Transformation ● Get motivated to support the Digital Transformation process ● Develop an Action Plan for Digital Transformation in your organization
5	Training Programme <ul style="list-style-type: none"> ● Module 1 - Introduction ● Module 2 – How Does Digital Technology Change Nonprofits? ● Module 3 – The Leader's Role in the Digital Transformation of Nonprofits ● Module 4 – Action Plan and Next Steps ● Module 5 - Summary
6,7	How Does Digital Technology Change Nonprofits?
8	Digital Native vs Digital Migrant
9	Digital Leadership <ol style="list-style-type: none"> 1. > 74% of NGOs have no person in the senior management who is responsible to foster the digital transformation of the organization 2. 70% of leading global NGOs do not have a global strategy 3. 52% of senior leadership in global NGOs do not envisage any changes in the future due to tech
10	The Leader's Role in the Digital Transformation of Nonprofits
11	What is Digital Transformation?

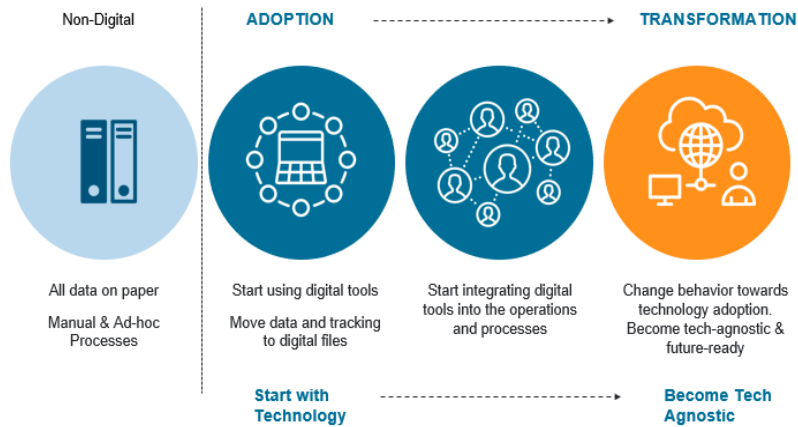
12

Digital Transformation

*Enhancing the impact of your organization through the adoption of **digital technologies** to create new — or modify existing — **processes, culture, and customer (beneficiaries) experiences** to meet changing requirements.*

13

Digital Transformation



14

3 Layers of Digital Transformation



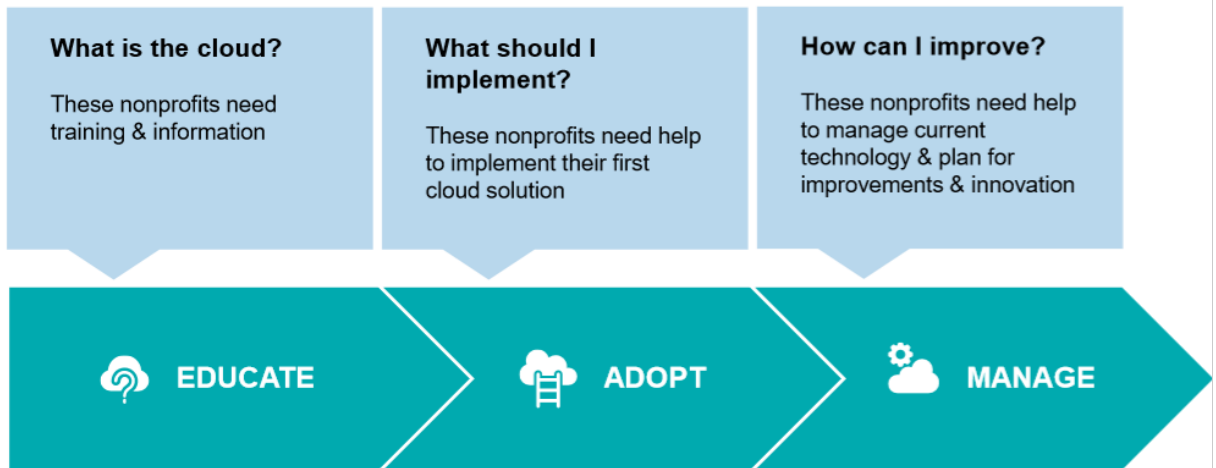
15

How technology is supporting mission of your org?



16

The Digital Maturity of Your Organization



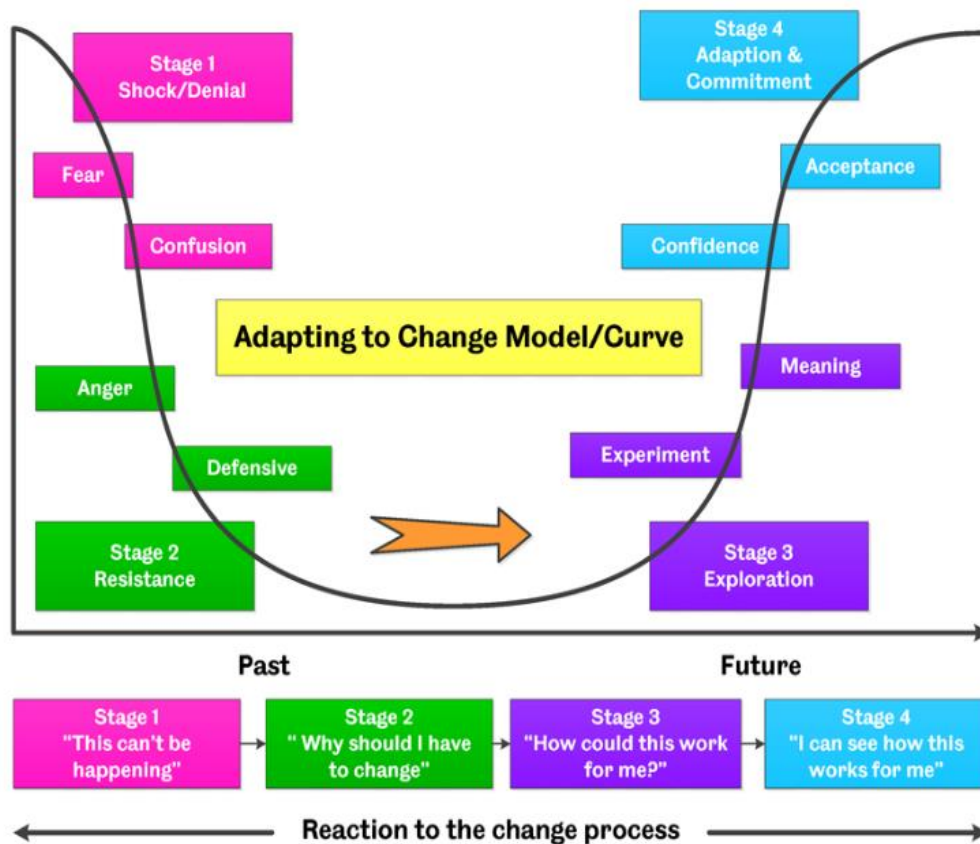
17

What is the Role and the Responsibility of NGO leaders in the DT process?

An NGO Leader has to...

An NGO Leader should not...

18	<p>How Digitally Savvy should an NGO Leader be?</p> <table border="1"> <thead> <tr> <th data-bbox="300 310 522 380">Information & data literacy</th> <th data-bbox="522 310 777 380">Communication & collaboration</th> <th data-bbox="777 310 1008 380">Digital content-creation</th> <th data-bbox="1008 310 1211 380">Problem-solving</th> <th data-bbox="1211 310 1369 380">Safety</th> </tr> </thead> <tbody> <tr> <td data-bbox="300 380 522 478">Browsing data, information & digital content</td> <td data-bbox="522 380 777 478">Engaging in citizenship through digital technologies</td> <td data-bbox="777 380 1008 478">Developing digital content</td> <td data-bbox="1008 380 1211 478">Solving technical problems</td> <td data-bbox="1211 380 1369 478">Protecting devices</td> </tr> <tr> <td data-bbox="300 478 522 577">Searching data, information & digital content</td> <td data-bbox="522 478 777 577">Sharing through digital technologies</td> <td data-bbox="777 478 1008 577">Integrating & re-elaborating digital content</td> <td data-bbox="1008 478 1211 577">Creatively using technology</td> <td data-bbox="1211 478 1369 577">Protecting personal data & privacy</td> </tr> <tr> <td data-bbox="300 577 522 676">Filtering data, information & digital content</td> <td data-bbox="522 577 777 676">Collaborating through digital technologies</td> <td data-bbox="777 577 1008 676">Programming</td> <td data-bbox="1008 577 1211 676">Identifying digital <u>compe-</u> <u>tence</u> gaps</td> <td data-bbox="1211 577 1369 676">Protecting health & well-being</td> </tr> <tr> <td data-bbox="300 676 522 774">Evaluating data, information & digital content</td> <td data-bbox="522 676 777 774">Interacting through digital technologies</td> <td data-bbox="777 676 1008 774">Copyright & licences</td> <td data-bbox="1008 676 1211 774">Identifying needs & techno- logical responses</td> <td data-bbox="1211 676 1369 774">Protecting environment</td> </tr> <tr> <td data-bbox="300 774 522 873">Managing data, information & digital content</td> <td data-bbox="522 774 777 873">Netiquette</td> <td data-bbox="777 774 1008 873"></td> <td data-bbox="1008 774 1211 873"></td> <td data-bbox="1211 774 1369 873"></td> </tr> <tr> <td data-bbox="300 873 522 942"></td> <td data-bbox="522 873 777 942">Managing digital identity</td> <td data-bbox="777 873 1008 942"></td> <td data-bbox="1008 873 1211 942"></td> <td data-bbox="1211 873 1369 942"></td> </tr> </tbody> </table>	Information & data literacy	Communication & collaboration	Digital content-creation	Problem-solving	Safety	Browsing data, information & digital content	Engaging in citizenship through digital technologies	Developing digital content	Solving technical problems	Protecting devices	Searching data, information & digital content	Sharing through digital technologies	Integrating & re-elaborating digital content	Creatively using technology	Protecting personal data & privacy	Filtering data, information & digital content	Collaborating through digital technologies	Programming	Identifying digital <u>compe-</u> <u>tence</u> gaps	Protecting health & well-being	Evaluating data, information & digital content	Interacting through digital technologies	Copyright & licences	Identifying needs & techno- logical responses	Protecting environment	Managing data, information & digital content	Netiquette					Managing digital identity			
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21	<p>Motivating Staff</p>																																			



Based on the Kubler-Ross model

[Source](#)

22 **My Action Plan Towards Digital Transformation**

23 **Summary**

24, 25 **How can TechSoup Support Your Organization in Digital Transformation?**