A GUIDE FOR SUPPORTING CIVIL SOCIETY ORGANISATIONS' DIGITAL TRANSFORMATION

DİJİTAL DÖNÜŞÜM FONU
ÇEVRESEL SÜRDÜRÜLEBİLİRLİK

SİVİL TOPLUM İÇİN DESTEK VAKFI

Supporters of Digital Transformation Fund for
Organisations Working on Environmental Sustainability 2021

A GUIDE FOR SUPPORTING CIVIL SOCIETY ORGANISATIONS' DIGITAL TRANSFORMATION

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ABOUT US

SUPPORT FOUNDATION FOR CIVIL SOCIETY

Acting as a bridge between donors and civil society organisations (CSOs), the Support Foundation for Civil Society (Sivil Toplum için Destek Vakfı; STDV) was established in 2015 to support the culture of strategic giving and grant making in Turkey.

We believe philanthropy can play a crucial role in solving Turkey's social problems. We design and implement grant programmes in collaboration with individual and corporate donors to support innovative models and interventions developed by grassroots organisations to create social change.

In line with these objectives we;

- Develop grant programmes based on the needs, priorities and motivations of individual and corporate donors.

- Implement grant programmes in partnership with local grassroots organisations that have significant impact.

- Inform our donors regarding activities of the CSOs they support.

- Bring together donors with similar interests to develop and implement collaborative solutions.

- Build a community of donors that have similar interests and are committed to finding solutions to pressing social problems of Turkey.

Between 2016-2022, under 10 different thematic funds, we provided a total of 16,839,755 TRY (1,981,634 USD) through 223 grants, mostly to grassroots organisations that have a budget of less than 200.000 USD annually, with the support of more than +2,500 individual and corporate donors. Our average grant throughout the period was 8,903 USD.
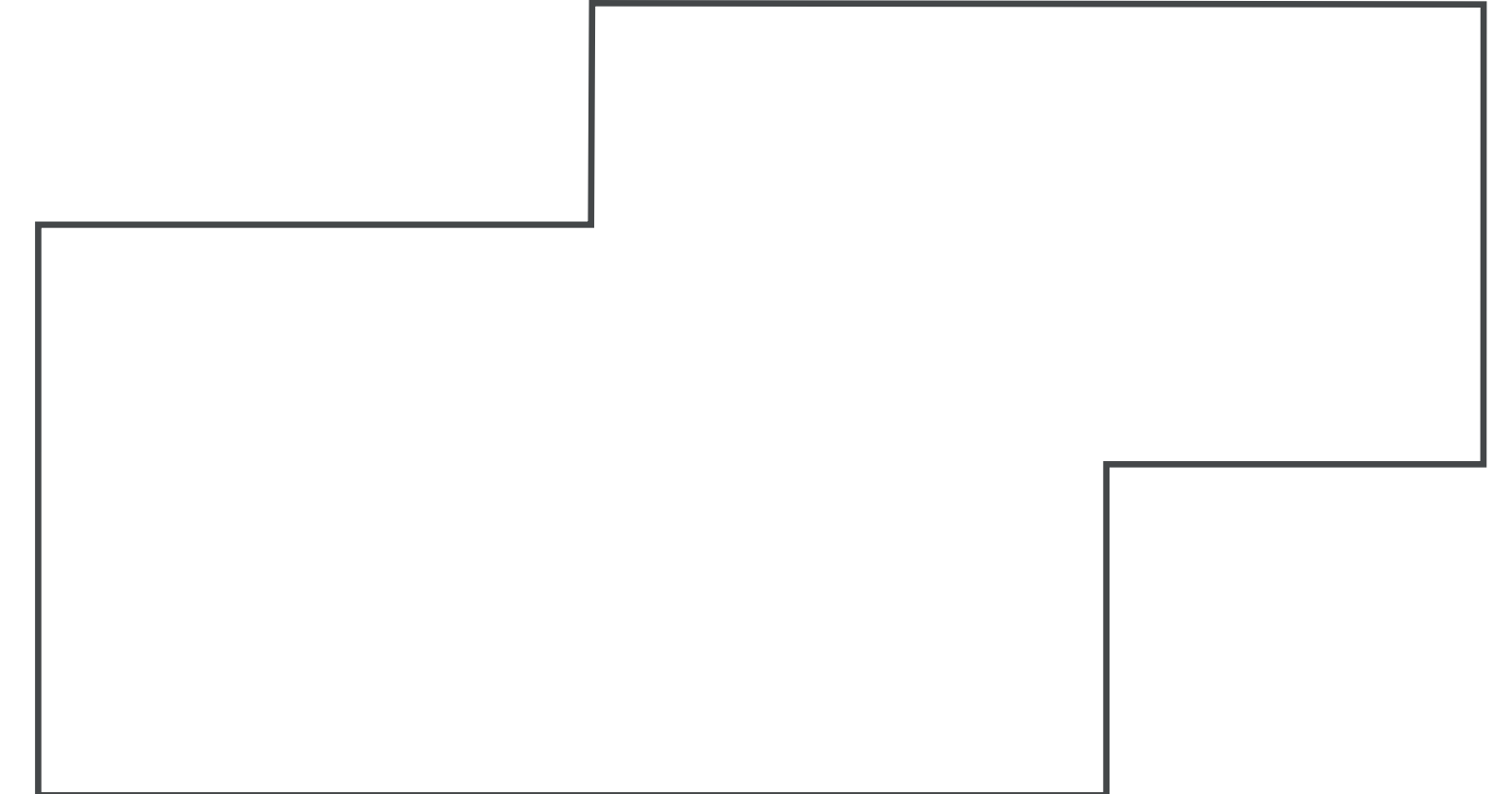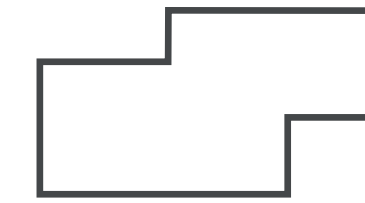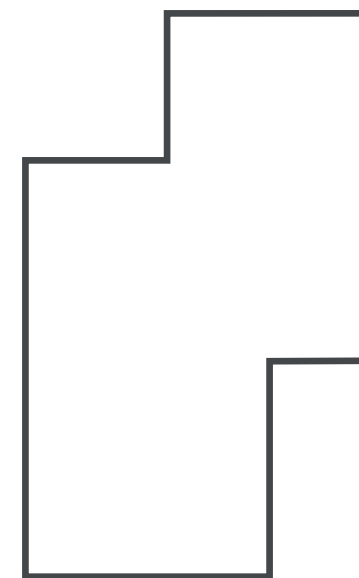
ABOUT US

THE EUROPEAN BANK FOR RECONSTRUCTION AND DEVELOPMENT

The European Bank for Reconstruction and Development (EBRD) was created in April 1991 to foster the transition towards open market-oriented economies and to promote private and entrepreneurial initiatives.

Since then, the Bank has invested over €160 billion in more than 6,000 projects across three continents.

Civil society organisations are integral audiences and partners of the EBRD in the countries where it invests. They provide a valuable contribution to the development of the Bank's policies, strategies and the implementation of investment projects, promote public dialogue and hold governments and policy makers publicly accountable.

EBRD's engagement with CSOs is designed to:

- Support the Bank's **Article 1** mandate of fostering transition towards market economies in countries that respect the principles of multiparty democracy and pluralism;

- Reinforce the implementation of EBRD's **Environmental and Social Policy** (ESP);

- Promote the EBRD's commitment to transparency and good governance as stated in its **Access to Information Policy**;

- Encourage cooperation and collaboration by use of the **Civil Society Capacity Enhancement Framework**.

TURKEY MOZAIK FOUNDATION

Turkey Mozaik Foundation (TMF) is a UK-based grant-making organisation with a mission to promote and support civil society organisations. The Foundation focuses on the participation and social welfare of vulnerable groups in society, mainly through the advancement of education, health, children's rights, gender equality, culture & arts, and environmental sustainability. Embracing the rich cultural heritage of Turkey, the Foundation is politically non-affiliated and non-governmental. It works with civil society organisations that strive to empower local communities and help drive social change through innovative means. Turkey Mozaik Foundation's main role is to provide funding for its partner charities and projects through donations and fundraising events in the UK.
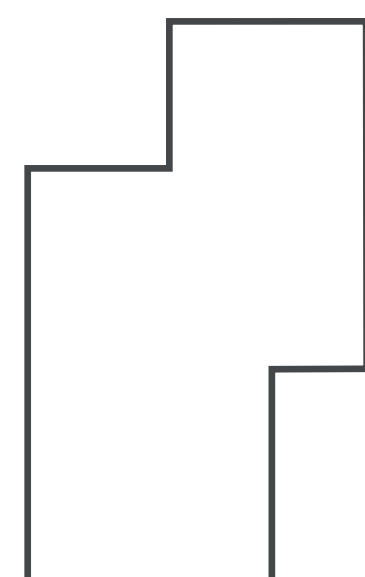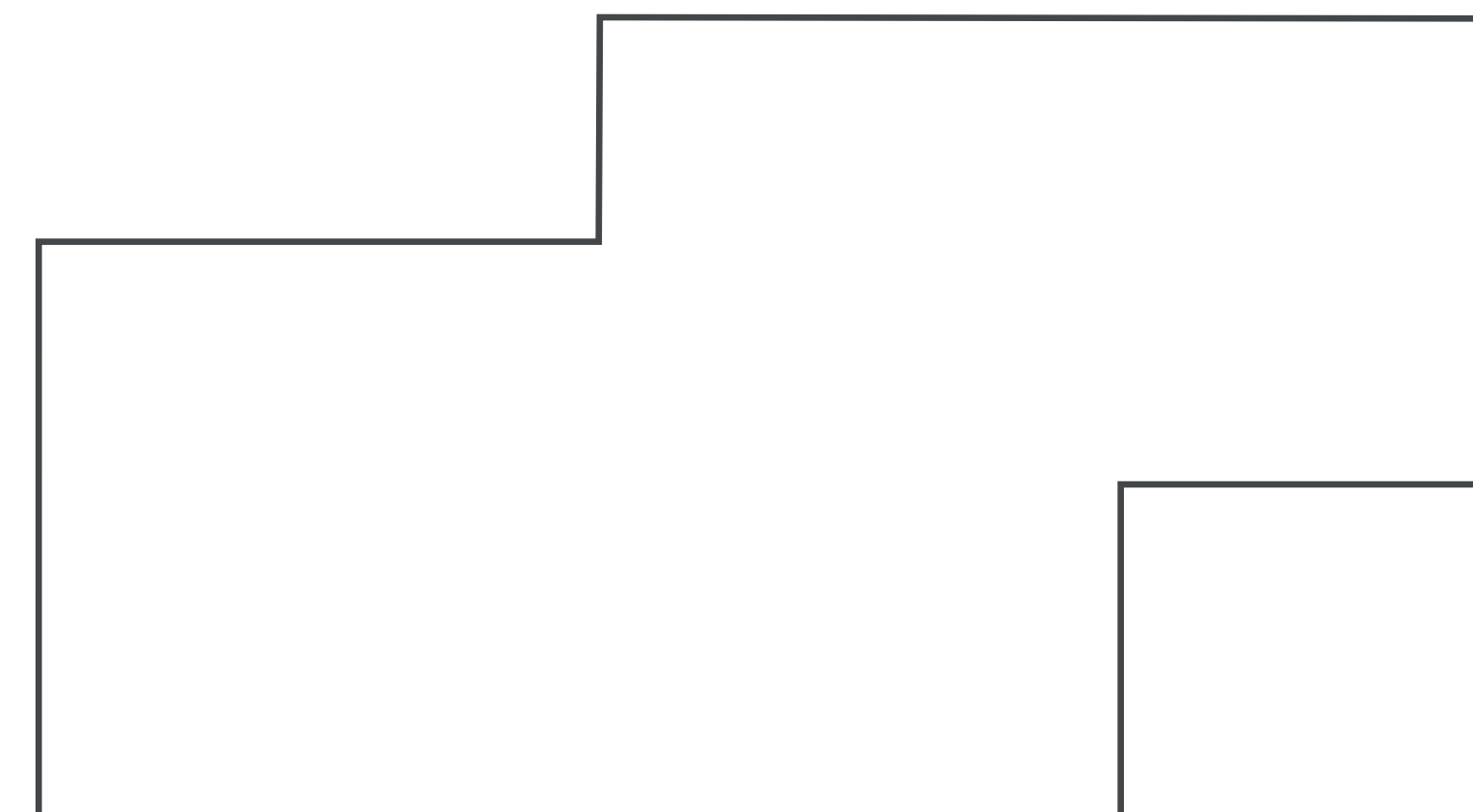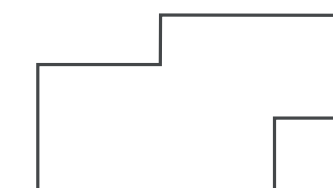
FOREWORD

The COVID-19 pandemic has pushed CSOs to embrace digital transformation as one of their top priorities. With social distancing and remote work, the integration of digital practices and solutions into daily work is no longer a choice but a necessity.

To help CSOs cope with the rapid change brought by the pandemic and the economic contraction, many software companies across the world have made their products available at discounted prices or even free. When implemented correctly, digital technologies allow CSOs, including the relatively new and small organisations with very limited resources, to reach out to stakeholders including potential donors and beneficiaries in novel ways, to deliver their services in a more efficient way and maximise their impact. However, without a clear framework and adequate support, the process of digitalisation can easily turn into a series of challenging tasks with too many digital tools and platforms to experiment with, thus creating a further organisational burden. Such processes also increase the risk of diverting team members' limited attention and energy from fulfilling their organisation's mission. It is thus essential for CSOs to prioritise their mission and to keep their organisational needs and constraints in mind while looking into the opportunities brought by the digital world.

As the Support Foundation for Civil Society, EBRD and Turkey Mozaik Foundation, we developed this grant and capacity building support programme with these risks and opportunities associated with digitalisation in mind. Digital transformation is much broader and deeper than merely adopting digital tools or purchasing new hardware. It requires organisational change and institutional capacity building to make digital transformation inclusive and sustainable. The COVID-19 outbreak, and its aftermath has made it clear that a holistic approach to digital transformation is vital not only for CSOs' long-term sustainability but also for their immediate survival. Thus, we equipped the organisations with both technical support through mentorship and digital competency workshops while providing them grants throughout the implementation phase.

We specifically focused on organisations that are grassroots and smaller in size because the pandemic and the economic crisis hit these organisations particularly hard; yet they have more potential to adapt themselves to any new reality organisationally more rapidly than larger organisations.

In the forthcoming chapters of this guide, you will find information concerning the basic phases of the digital transformation programme, and methods and tools used in these phases. The process we present in the guide and the tools we recommend can be updated, curated and adapted based on the priorities of other institutions willing to realise a similar programme.

We hope that this Guide for Supporting Civil Society Organisations' Digital Transformation will support civil society organisations to work on digital transformation more effectively.

GLOSSARY

We compiled a small glossary to create a user-friendly document. Please find several concepts and their meanings - according to the realities of this programme - below.

Donor organisations: Sivil Toplum için Destek Vakfı (STDV/Support Foundation for Civil Society), Turkey Mozaik Foundation (TMF) and European Bank for Reconstruction and Development (EBRD).

Digital transformation: It is the process of using digital technologies to create new — or modify existing — organisational processes.

Environmental sustainability field: The field composed of at least one of the areas of "clean water and sanitary conditions", "accessible and clean energy", "climate action", "life in the water and terrestrial life", which are among the United Nations Sustainable Development Goals.

European Bank for Reconstruction and Development: An international financial institution founded in 1991. A multilateral developmental investment bank founded in 1991 using investment as a tool to build market economies.

External expert: Contract based outside expert who supports the programme coordinator.

Grant: Selected grantee organisations received 75.000 TL/7.183 EUR (Exchange rate: 1 EUR = 10,44 TRY) in this programme.

Grantee (organisations): 5 non-profit organisations selected to be supported throughout this programme.

Grassroots organisations: Non-profit civil society organisations that have a budget of >30.000 TL (2.873 EUR) and >2.000.000 TL (191.570 EUR) working directly with communities (Exchange rate: 1 EUR = 10,44 TRY)

Organisational development opportunities: A group of learning opportunities available for grantee CSOs in this programme including;

- Self reflection process for each CSO to understand its own organisational needs and an action plan

- Grant

- Mentorship

- Learning opportunities in the form of expert meetings with each CSO based on individual organisational needs

- Online workshops for common organisational needs.

Programme coordinator: Full time paid staff in STDV who is responsible for coordinating the programme.

Programme team: A group composed of members from all donor organisations as well as the Programme Coordinator and the External Expert.

Sivil Toplum için Destek Vakfı: A grant making foundation operating in Turkey from Istanbul supporting grassroots Civil Society Organisations.

Turkey Mozaik Foundation: A grant making foundation operating for Turkey from London through mobilising diaspora funding in the UK.

STEPS FOR DEVELOPING A DIGITAL TRANSFORMATION SUPPORT PROGRAMME FOR CSOs

SELECTING THE GRANTEE ORGANISATIONS

- COLLECTING AND SCREENING OF APPLICATIONS
- PREPARATION OF THE SHORTLIST FROM THE APPLICATIONS
- SELECTING THE GRANTEE ORGANISATIONS

IMPLEMENTING THE ORGANISATIONAL DEVELOPMENT COMPONENT

- ORGANISING NEEDS ASSESSMENT MEETINGS
- MATCHING THE GRANTEE ORGANISATIONS WITH MENTORS
- MATCHING CSOS WITH MENTORS
- PROVIDING MENTORSHIP
- ORGANISING WORKSHOPS AND EXPERT MEETINGS

INFORMING THE GRANTEE ORGANISATIONS

- ORGANISING THE LAUNCH MEETING

DESIGNING THE PROGRAMME

- DETERMINING THE SCOPE OF THE FUND
- ORGANISING CONSULTATION MEETINGS WITH THE EXPERTS IN THE FIELD
- PREPARING THE PRINCIPLES DOCUMENT
- PREPARING THE CALL FOR PROPOSALS AND APPLICATION FORM
- APPLICATION FORM
- INFORMATION MEETING WITH CSOS

COMMUNICATION ACTIVITIES

- DETERMINING FUND'S VISUAL IDENTITY
- CREATING SOCIAL MEDIA CARDS
- PREPARING A DIGITAL PAGE FOR THE FUND
- CONTENT DEVELOPMENT PROCESS

MONITORING AND EVALUATION ACTIVITIES

- EVALUATION TEXT
- INITIAL REPORT
- INTERVIEWS
- VISIBILITY RULES

DESIGNING
THE PROGRAMME

1.1. Determining the Scope of the Fund

As the Support Foundation for Civil Society, since 2016 we have been providing grants and organisational development opportunities in the form of mentorship and other learning environments to our grantee organisations. This holistic approach multiplies our impact on the field not only because grants and organisational development initiatives complement each other but also because it creates additional leverage for organisations to tackle their own internal organisational problems.

Based on this experience, we also designed this programme with two main components; grants and the organisational development component.

We set the priorities of this digital transformation programme with the active involvement of three partner organisations; European Bank for Reconstruction and Development , Turkey Mozaik Foundation and Support Foundation for Civil Society . Environmental sustainability was already an area that the donor organisations were willing to support. With COVID-19, civil society organisations' daily operations have been affected and as such, adapting themselves to digitalisation has become a pressing need. Developing a programme in the intersection of environmental sustainability and digitalisation, therefore, became the focus of the programme.

The core team of the programme consisted of a Programme Coordinator who was a full time employee under the STDV and had previous experience in designing and implementing similar programmes. Other team members of STDV contributed to the design and implementation process based on their own expertise from time to time. In addition, an External Expert (contract based with payments tied to deliverables) supported the whole process and was the first point of contact between grantees and the programme team. This expert was selected according to his previous experience in supporting CSOs, especially in terms of digital transformation and technology based programmes. Furthermore, all of the partners of the Fund contributed to the programme in the design and implementation phase by providing feedback and expertise in the content and project management through biweekly meetings.

We originally designed the programme for 12 months, but at the end saw the need to extend it for an additional 3 months in order to provide more time and space for organisations to implement their work. This additional period provided a useful time for the coordinating team of STDV to work on the quality aspects of the programme.

From the beginning, our aim was to support civil society organisations' digital transformation process to adapt itself to the ever changing landscape. This, especially in a time when obscurity became the new norm, has not been easy. Additionally, our strategic decision was to support grassroots organisations working on environmental sustainability that have less opportunity to access such programmes yet are more agile to transform and adapt themselves to new realities.

The focus of the Fund was to provide core grants. This approach has been one of the impactful edges in nearly all of the pooled funds developed by the STDV and the TMF. The funding infrastructure, however, wrongfully focus solely on projects. Additionally, for some funders, expenses for staff and administrative costs have been conceived as undesirable for funding. On the contrary, in order for CSOs to work efficiently, not only projects but organisations themselves should also be supported. In this respect, rather than focusing on how the grant money is being used, we concentrated on how it would make an impact within the organisation and how our programme's goals would be achieved. An integral part of this core grant approach has also been to provide learning environments for the grantees, such as interactions with mentors, engaging themselves with workshops, etc. We designed the programme based on three basic and concrete scheduled phases; the preparation, implementation and reporting/archiving.

1.2. Organising Consultation Meetings with the Experts in the Field

The preparation phase started with a series of consultation meetings. We needed to learn the essentials and trends of digital transformation and environmental sustainability from experts to design a programme based on the needs of civil society organisations. Accordingly, we organised two separate meetings; one with activists, academics and civil society experts working on environmental sustainability, the other with prominent experts who have experience on using digital technologies and digital transformation for organisational development. From our experience working with CSOs in the field, we drafted a list of invitees and finalised it with suggestions from all project partners. We consulted multiplier organisations, such as other donor and capacity building organisations that are CSOs working within the context of capacity building and grantmaking.

Each online meeting lasted 1.5 hours with less than 10 invitees to allow for every participant to express their knowledge and experience in their respective fields. A member of the STDV team moderated the meetings and at least one representative from the partnering organisations attended.

Prior to each meeting, we sent an email outlining the agenda, objectives and the list of participants. The meeting was organised in the following way:

- **Introduction:** An introductory session that lasts less than 10 minutes, when each participant briefly introduces themselves with a specific focus on how their organisation and/or themselves are related to digital transformation or the environmental sustainability field.

- **Summary of the meeting:** The moderator of the meeting, if possible with the support of visuals, summarises the aim and objectives of the meeting.

- **Information about the programme and partner organisations:** The moderator gives information about the envisaged programme followed by each partner organisation's introductions. This part of the session lasts less than 5 minutes; however, it is important for participants to understand the motives of the partner organisations in supporting this programme.

- **Content:** The moderator asks three separate questions to the participants and encourages an open discussion. The questions addressed in this part of the session were:

  - What are the trends in the environmental sustainability/ecology and digital transformation nexus?

  - What are the organisational problems of CSOs working in the environmental sustainability/ ecology field, particularly in the context of digital transformation?

  - If you were to design a fund for CSOs working in the environmental sustainability/ecology field on digital transformation, what would be the criteria for application and selection?

1.3. Preparing the Principles Document

As a result of the information and feedback gathered from these meetings, we drafted a strategy/white paper. This document outlined the basis and structure of how this programme should be developed and who it should target. We sent this strategy paper to all of the participant experts and finalised it with their comments. The final version of this strategy paper has set the framework for the Fund and formed the basis for the call for proposals and the application form.

It is important to note that some of the experts that participated in these consultation meetings were also representatives of organisations that could potentially apply to the fund. We wanted to ensure that we would get genuine feedback from experts active in the field, but also avoid any potential conflict of interest. Thus, from the very beginning, we made it clear that we only wanted their input for the strategy paper, yet did not send the draft or any information about the call for proposals to avoid a conflict of interest.

1.4. Preparing the Call for Proposals

The fund aimed to support CSOs with a legal entity (in Turkey, associations, foundations and cooperatives are the legally defined entities for civil society organisations.) that have a budget of between 3.200 - 220.000 EURs (30.000 TL - 2.000.000 TL at the time of the call for proposal). These organisations should have a proven track record and have the desire, motivation, need and capacity to transform their organisational processes digitally.

With an aim to provide an opportunity to informal groups and organisations, applications of such groups were accepted as long as they are hosted by an organisation with a legal entity. In this way, the organisation that has the legal entity provided back-office support to the group itself. This also provided a solution to the possible transparency problems as legal entities have certain requirements for reporting.

We limited the scope of applicants to CSOs working in the environmental sustainability field with a focus on several Sustainable Development Goals (SDGs) of Clean Water and Sanitation, Affordable and Clean Energy, Climate Action, Life Below Water and Life on Land.

In our programme, we defined digital transformation as "the strategic restructuring of all organisational and operational processes with digital technologies, beyond just using activity-oriented digital tools."

We asked the applicants to present their digital transformation idea as a 'totality of actions', meaning that their applications were expected to compose of consecutive set actions that are linked with each other as part of a strategy, and not as individual activities, covering (at) and focusing on at least one of the following organisational capacity categories:

- Institutional efficiency: Improvement and/or regulation of CSO's relationship with information and data mapping, database creation, new data collection formats, purchasing new software and ensuring the cohesion of teams, etc.

- Communication with stakeholders: Creating a communication infrastructure that can mobilise the public and/or target audience of the CSO, visualisation of data to make its message more understandable in advocacy work, transformation of an existing programme to digital environment, etc.

- Product/service development with income-generating potential: Creating donor interface, e-shop, creation of online/registration-based training/certificate programme, establishment of infrastructure for donor-oriented information, etc.

1.5. Application Form

The application form consisted of 5 main parts:

1. **Information on the applicant organisation:** that helped us understand the track record of the organisation and the people involved with it.

2. **Approach of the organisation:** in order to understand how they define and understand the social problem that they are working on

3. **Needs of the organisation:** within the context of compatibility between the needs of the organisation and what this programme can offer

4. **Information on the focal point responsible from the application:** for the programme team to get in contact for further info if needed

5. **Other necessary documentation:** such as the Curriculum Vitae (CV) of the person responsible for the running of this programme in the organisation, any other info/document that might support the application such as a publication, news article, etc.

Please find the application form, **here.**

Both documents were published based on the productive tension between receiving as much information as possible on the one hand and making the documents as accessible as possible on the other. In other words, it is relatively easy to come up with an application form where you receive the ideal complete information to assess the application and the organisation itself. Yet, the more the application form gets complicated, the harder it is for certain organisations to fill it out. In this respect, the delicate balance of "only the necessary information for the organisation to fulfil yet enough data for the team to easily evaluate the application" was taken care of.

To analyse the applicant data efficiently, we designed the form with mostly close-ended answers if possible. (For example, in the address section all cities were pre-determined for applicants to select)

We launched the call via one of the implementation partner's website **www.siviltoplumdestek.org.** Using social media platforms such as Facebook, Twitter, Instagram and Linkedin, we disseminated the call further. Additionally, we asked the help of certain media platforms that are particularly broadcasting civil society news.

1.6 Information Meeting with CSOs

We organised an online information meeting with an aim to introduce the fund and respond to any questions that may be raised by potential applicants. This provided a platform for CSOs to learn about the programme directly from the team. In the meeting we introduced ourselves, introduced the programme (including the grant and organisational development components) and organised a Q&A session.

! GOOD TO KNOW

- It is important to acknowledge that many small and even medium-sized CSOs that were recently established and run by their founding team, who commit their time outside of working hours, may not be fully prepared to go through a digital transformation process in a holistic way required by the programme.

- For young, early-stage CSOs that have limited resources, it is better to understand whether they have gone through an organisational development programme prior to focusing on digital transformation. Generally, there is a need to build certain basic institutional capacities before aiming for digitalisation. Many small-scale CSOs have limited, temporary funding channels, hence the capacity and level of commitment of the founding team very much rely on multiple external factors that vary from year to year or even season to season.

- There are two different scenarios when it comes to an organisation's approach to a digital capacity building programme:

  a) A CSO may have an existing system, either physical or digital, that needs to be transformed;

     e.g. An existing online donation page that needs to be redesigned/restructured or moving from the existing in-person donation collection events to online ones

  b) A CSO may aim to create a new digital system in an area where it has no previous experience

     e.g. Creating a digital payment/donation system for the first time

     The latter requires additional work for the CSO such as learning more about the legal constraints, its consequences on the organisational capacity (i.e. informing the donors, creating a new database etc.)

02

**SELECTING
THE GRANTEE
ORGANISATIONS**

2.1. Collecting and Selecting the Grantee Organisations

The following criteria was taken into consideration in reviewing the applications:

- **Relationship of the CSO/application with what the programme is offering:** We made sure that the applicant CSO works in the relevant field and the application is in accordance with the framework presented in the call for proposal (providing a holistic application associated with the specified Sustainable Development Goals). We also made sure that the process that the CSO proposes to implement has a strategic set of activities linked with a strategic vision.

- **Institutional capacity of the applicant organisation:** The organisation's members, connections, employees (if any), volunteers and expertise, have the knowledge, skills, time and experience required to fulfil the vision of digital transformation – by at least two people – who have the primary responsibility for this transformation and will participate in the programme.

- **Scalability:** When sufficient resources are mobilised, the emerging digital transformation model of the CSO has the potential to be reproduced and have a potential impact on the relevant field/on other organisations.

- **Concrete outputs:** The products, services, organisational impact, etc. planned to emerge as a result of the realisation of the presented digital transformation idea have concrete outputs.

- **Originality:** The originality of the idea and the approach is new for the relevant field and/or the geography.

2.2 Preparation of the Shortlist from the Applications

The team internally reviewed the applications and came up with a long list to be interviewed via video call. With each CSO, the team organised a call that lasted around 45 minutes. In each meeting, based on the application provided, we tried to understand more about the applicant's organisation and the information submitted in the application. Based on our interviews, we scaled down our long list to a short list. For each CSO in the short list, we organised a one pager that explains the CSO and the application also based on our observations. Attaching this document, we sent all shortlisted application forms to the selection committee.

2.3 Selecting the Grantee Organisations

The selection committee was composed of donors, decision makers of the partner organisations and several field experts. In the selection committee meeting, we presented each application for five minutes. Then we gave the floor to the committee members to express their views facilitating a discussion. After we presented all applications, each committee member provided a score between 1 – 5 and we ranked applications based on the scores they received. The top-scored applications were reviewed for the last time to make sure that no committee member had an objection.

For some applications, committee members raised some conditions as a prerequisite to be accepted. We negotiated these conditions with CSOs and upon mutual agreement on the framework and terms, CSOs in principle became eligible to participate in the programme.

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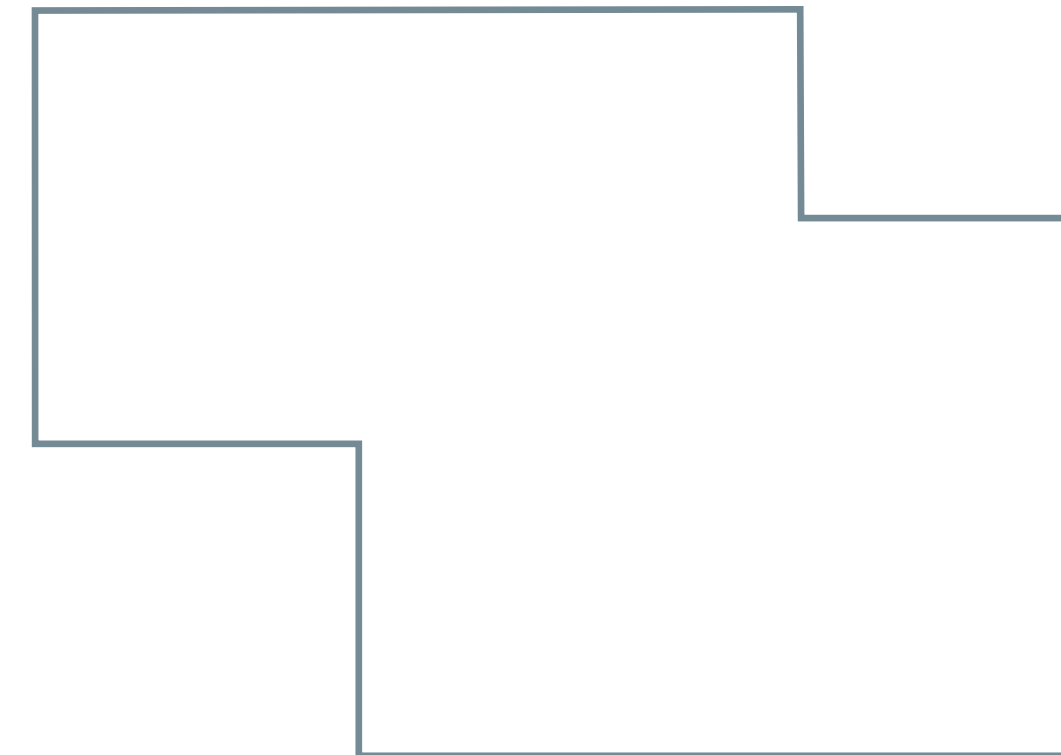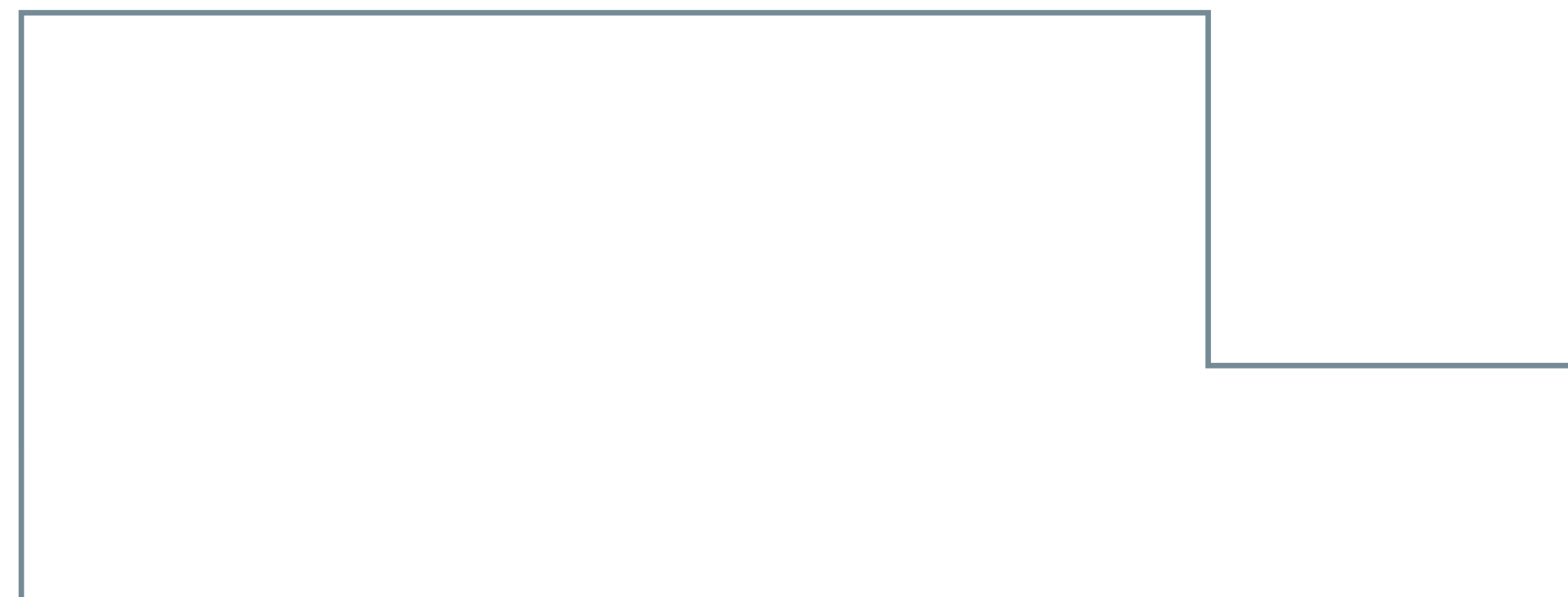
INFORMING
THE GRANTEE
ORGANISATIONS

3.1 Organising the Launch Meeting

Organising a launch meeting is important to lay the ground rules and responsibilities of every stakeholder. It also marks the start of a relationship between the team and the beneficiaries, both on individual and organisational level, that should be based on trust as it is a prerequisite for similar programmes to achieve their true potential.

With the launch meeting, we informed all CSOs that in principle we would support them. To start the process of how we will implement the programme and support them, we organised an online meeting that lasted for an hour. In this meeting, all partner organisations and the team were present. Each participant found the opportunity to introduce him/herself as well as the organisation they represent.

The programme team, with the support of a visual presentation, outlined the roles and responsibilities of all partner/donor organisations as well as the people who would be directly in contact with the CSOs throughout the process. As the implementing organisation, STDV made sure to summarise what the programme would offer, which are:

- Self-reflection process for each CSO to understand its own organisational needs and an action plan

- Grants

- Mentorship

- Learning opportunities in the form of expert meetings with each CSO based on individual organisational needs

- Online workshops to address the joint organisational needs of the grantee organisations.

According to the feedback we received, all CSOs were happy with meeting all parties in the same meeting. On the grantee side, meeting donor organisations has been a plus as it is usually a rare opportunity for CSOs to directly meet with donors.

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**IMPLEMENTING
THE ORGANISATIONAL
DEVELOPMENT
COMPONENT**

4.1 Organising Needs Assessment Meetings

Organisational development is a process that is needs based. This is why the needs of each organisation should uniquely and separately be determined. This process also creates a self-realisation of certain needs – sometimes for the first time - on the organisation side also. It is also important as all the support interventions in the form of grants, mentorships and other learning opportunities are built up and curated based on the outcomes of this. In other words, this is a strategic phase that needs to be handled delicately as it consecutively creates a chain reaction on the content of support interventions. This phase of the programme also is the processes for analysing and prioritising the needs of the grantee organisations and setting the framework of the grant agreement.

Prior to this phase, we had gathered most of the necessary basic information about the participant organisations through the application forms they had submitted for the programme:

- The organisation's recent history, annual budget and sources of income from the previous year, target groups, areas of work, etc.

The CSOs in our programme had various organisational characteristics in common:

- All but one of them were relatively new and small CSOs established in the past 2-3 years. Thus, there was little need for these organisations to make a major shift from traditional to digital work models.

- Their daily operations were run by their founding teams with limited need for transition and expansion.

- The organisations were often managed by their founders and members on a voluntary basis. The core teams consisted of very few, if any, full-time or part-time professional staff.

We developed our methodology for digital needs analysis with their institutions' age, size and general objectives in mind.

With each grantee organisation, we held 3 separate sessions in a period of 2 weeks:

Session #1 - Institutional Capacity Assessment: 1 hour
Session #2 - Introduction to Digital Transformation: 1 hour
**Session #3 - Digital Strategy and Roadmap:** 2-3 hours

Due to pandemic measures, we held all our meetings online.

We had two project members present throughout all sessions.

We made individual appointments with each CSO and asked them to join our meetings with 2 or 3 members who were already assigned to lead their organisation's digital transformation projects.

Before the first session, a detailed survey developed by STDV called the **Capacity Development Component - Capacity Building Form** was shared with each CSO. The survey was not designed to provide them with a specific score or a success rate, but rather to guide them through the complexities of institutional needs and capacities that they might not yet be aware of and to rethink their priorities, strengths and weaknesses.

The survey also helped them come to the first session with their own questions as well.
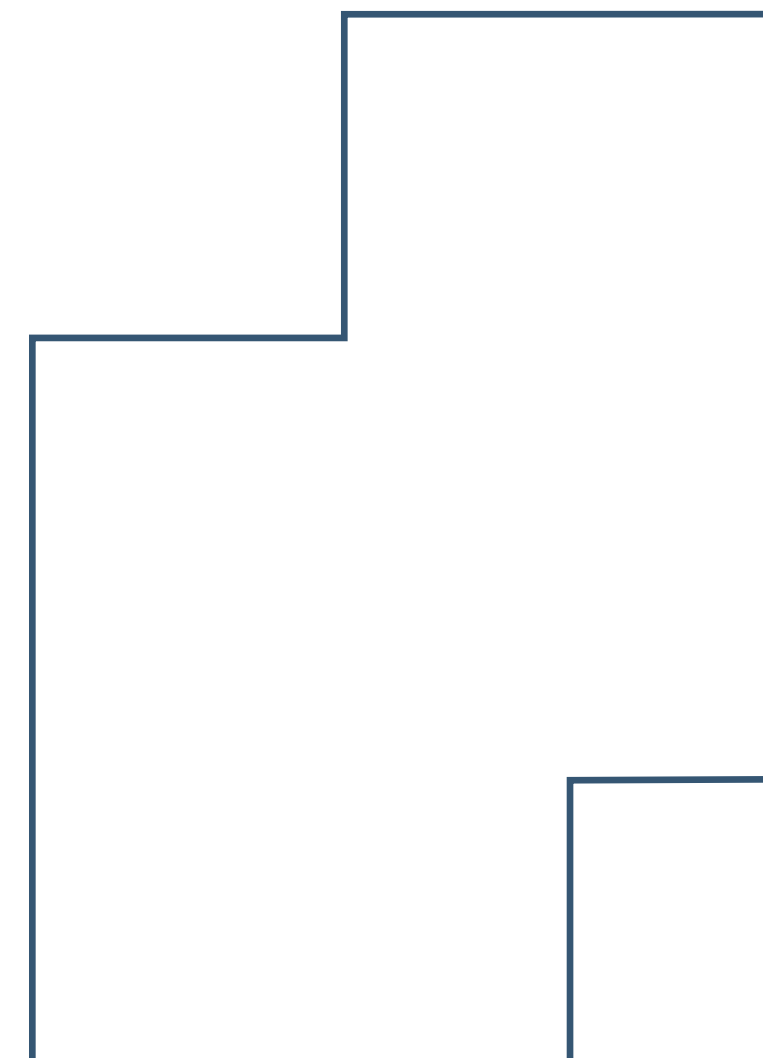
a. Session #1 - Institutional Capacity Assessment

a.1 Introducing Ourselves and Listening to the CSO's Story from Team Members

We designed the first meeting to get to know more about the "personal" stories of each CSO. We asked them questions about their organisation's activities in general and how their organisation's work and capacity evolved from the past till the present.

The main purpose of this part was to understand the current state and capacity of each CSO from their own perspectives.

a.2 Understanding the General Objectives of the CSO + SWOT Analysis

We then moved on to our SWOT analysis and a more in-depth conversation with each organisation regarding their immediate needs to better perform in their own field of work.

The assessment process was designed in a semi-structured way to promote a non-hierarchical partnership model between the grantee CSOs and STDV. The goal of the process was to understand how the organisation members see their own institutional strengths and weaknesses and what they see as threats and opportunities.

b. Session #2 - Introduction to Digital Transformation

In the second session, we focused on the digital side of each organisation. We called it "Introduction to Digital Transformation" and like the first session, it was a semi-structured interview where the team members told us about their organisation's digital capacities and what they see as their digital strengths and weaknesses.

Another goal of this meeting was to create awareness within the organisations on digitalisation and digital transformation areas and to prepare them for the next meeting.

c. Session #3 - Determining the Digital Competencies, Capacities and Priorities of Team Members for Digital Transformation

Between the second and the third session, another set of questions was shared with the CSOs in order to give them an overview of the final stage that would particularly focus on digital needs and challenges and opportunities in the digital space.

DIGITAL NEEDS ASSESSMENT - TOPICS AND QUESTIONS

TEAM MEMBERS (HUMAN RESOURCES)

Decision-Making Processes for Digital Transformation
- Who makes decisions about the digitalisation process within the organisation?
- How are decisions made regarding the digitalisation process within the organisation?
- Have there been any changes in decision-making regarding the digitalisation process over time?
- How often and by what methods are the opinions of stakeholders involved in digital tools and digitalisation received?

Capacity Building Training
- What kind of work is done within the institution to improve the digital literacy and skills of the team members (professional and volunteer employees)?

SOFTWARE AND HARDWARE

Software and Digital Tools
- Which criteria are taken into account when selecting the software/apps to be used across the organisation?
- Does the organisation maintain an inventory list of currently used tools and apps?
- Is free software preferred? Does the organisation request the paid versions of the software at a discounted price or free from the vendors?
- Is open-source software preferred?
- How does the CSO preserve its corporate memory in this aspect?

Hardware and Gadgets
- Is the institution's work carried out on the personal belongings of the team members (phone, computer, camera, etc.)?
- Which criteria are taken into account in hardware selection?
- Does the organisation maintain an inventory list of currently used hardware and gadgets?
- Does the organisation experience challenges due to the lack of hardware equipment and gadgets?

Common Needs and Know-How Exchange with other CSOs
- How do the organisation members determine its software and hardware needs?
- Is there information sharing on the use of software and hardware with people and institutions working in the same or similar field?

Budget
Does the organisation have an annual budget to maintain or renew its software and hardware tools? Are the costs paid by the CSO or the team members individually?

INFORMATION - DOCUMENT MANAGEMENT

Are there certain procedures and roadmaps determined within the institution that team members should follow while producing documents?
- Where and how are documents stored?
- Are there corporate-specific templates used for documents prepared on behalf of the institution (Word, Excel, Powerpoint, etc.)?
- Is there a person or group of people in charge of the digital archive? Who has access to the archive?
- Is the in-house document archive backed up? (If backed up, where? In the cloud? On the hard disk?)
How is information & document management handled during the project writing, grant application and project reporting processes

DATA MANAGEMENT

What does the organisation do to gather and manage the data of campaign and event participants, beneficiaries, donors and other stakeholders?
- How did the GDPR (in Turkish law - KVKK) affect developments related to the operation of the institution, data collection and storage?
- Are there any common decisions taken within the institution regarding data management?
  - Where do you store your data?
  - Who has access to the data?

COMMUNICATION WITH STAKEHOLDERS - SOCIAL MEDIA MANAGEMENT

What was taken into consideration when creating social media accounts?
- Who made the decisions about the platforms to open an account?
- How many social media platforms does the organisation actively use?
- Has the number of platforms changed over time?
- How many people does the team that manages social media accounts consist of?
- Has this number changed over time?
- Is there an exchange of views among team members on the costs (time or money) and benefits of social media accounts to the operation of the institution?

How often is the corporate website updated?
- Is there content compatibility between the website and social media accounts?

Does the organisation have a written outreach strategy for its communication with the wider community and stakeholders?
- Does the organisation inform its stakeholders through e.g. newsletters?
- Are there any CRM (customer relationship management) programmes used in Stakeholder Communication Management?
- Does the organisation regularly use other media tools such as podcasts, videos (live broadcast or recorded footage)?

INTERNAL COMMUNICATION

- How do team members digitally communicate? (Email, Whatsapp, telegram, slack, discord etc.)
  - On average, how often do team members talk to and message each other through these platforms?
- Does the organisation have a specific framework/protocol for its internal and external meetings through the digital platforms?
- How do team members follow each other's work through the digital space?
- Is there a person (or group of people) in charge of internal communication?

FINANCIAL MANAGEMENT - RESOURCE DEVELOPMENT

- Is there any software used for accounting?
- Who is using it? Is the organisation outsourcing it to its accountant? Is there a need for change?
- What sort of digital methods, if any, are followed to collect donations and fundraising?

CYBER SECURITY

- Does the organisation use specific software to maintain its cybersecurity?
- Where are the passwords of social media accounts stored? Who can access them?
- Have you ever been exposed to any cyber-attacks? Has any work been done to prepare for this issue?

Similar to the first two sessions, the third session was also designed as a semi-structured online meeting.

The third session had two main goals:

- To assist the CSOs in finding their specific digital needs and attainable goals

- To support them in re-evaluating their digital transformation plans and making minor modifications in their budget lines

We used our own set of Digital Needs Assessment Questions under the following categories:

- Team Members / Human Resources (Digital competencies)

- Software & Hardware (Infrastructure)

- Information-Document Management

- Data Management

- Internal Communication

- Communication with Stakeholders & Social Media Management

- Financial Management - Resource Development

- Cyber Security

Instead of making it a one-time form to be filled out and submitted, we shared our questions in a collaborative sheet format and asked the team members to work on the document.

d. Revising the Digital Transformation Goals and Planned Budget

Following the third meeting, we asked each team to further revise their project goals, success indicators and budget. With each of the selected CSO, an organisational strategy document was prepared.

In the end, all organisations developed a comprehensive plan that would include their goals with the grant provided specifically for their digital transformation priority areas and also a secondary area, if needed, to strengthen their digitalisation process.

! GOOD TO KNOW

- Using simple terms while describing digital components is important to make the assessment process more inclusive and easy to follow. Using too many technical terms during the interviews and surveys might create difficulty or even become intimidating for people who are less familiar with the digital tools, methods and processes.

- Institutional capacity and digital transformation are closely associated. There may be non-digital but urgent needs of a CSO that needs to be solved in order to make room for digitalisation.

- The size and age of CSOs matter when it comes to their capacities and attainable goals. We did not ask any questions that could be asked to larger organisations such as workings across departments and field offices, etc.

- CSOs may not be aware of many potential security issues and other technical difficulties that often accompany digital transformation or enhancement programmes. Creating a database of real scenarios from other CSOs primarily, but not only, from Turkey may be helpful for other CSOs.

- For a more improved digital needs assessment process, it will be better to provide a few fictional case studies in advance and ask them to provide their organisational response, or their personal responses.

- Asking direct questions on several technical issues such as data management or social media strategies may provide adequate statistical/numerical information but very limited insight.

4.2 Matching the Grantee Organisations with Mentors

We matched each CSO with mentors that have the right approach, skill sets and experience based on the organisational theme that they want to work on. Through a tailor made process, the mentor supported the organisation and the programme team monitored this process. We asked mentors to spend at least 8 hours a month with the CSOs that they work with. The mentors' digital capacity had also been enhanced so that they could duly support the selected CSOs in the digitalisation process.

The mentoring process steps were followed as follows:

a. Selecting the Mentors and Conducting Interviews with Them

Following the needs analysis meeting organised with grantee organisations, this phase includes the selection of and a verbal agreement with suitable mentor candidates. We matched mentors with grantee organisations based on their skills, expertise and approaches. Mentors were communicated with one by one and they were informed about the programme, the process, the related CSO and its organisational needs.

b. Meeting with CSOs to Agree on the Mentor

It is crucial to have the grantee organisation's consent before choosing a mentor. The mentor is presented to the CSO and detailed information is provided about what type of contribution s/he can provide regarding the needs of the CSO. In this phase, providing the CV of the mentor is also helpful. The consent of the organisation is crucial for a successful match.

After approval from both parties, a joint email was sent to the organisation and the mentor and a date was fixed for the meeting to introduce the mentor to the CSO.

Yet before, an online meeting is held after the submission of the document and insights are exchanged regarding capacity building needs and priorities of the organisation.

An agreement is signed between mentors and the grant-making organisation to officially start the mentorship process.

4.3 Matching CSOs with Mentors

This is the phase when the organisation and the mentor come together in an introduction meeting. This meeting is hosted by the grant-making organisation and the parties are expected to draft a working plan based on their own choice and pace.

4.4. Providing Mentorship

It is the process when the organisation and mentor work together in their own rhythm. Given that a mentor allocates around 8 hours a month, this phase includes offline or online meetings and intense work among stakeholders.

Monitoring meetings were organised between the team and the mentors as well as the CSOs to further support the capacity building process with other learning opportunities.

> ### ! GOOD TO KNOW
>
> - Many challenges, whether (they are) legal, organisational or technical, are not unique to a particular CSO. However, due to lack of collaboration and information sharing, CSOs seem to use their limited resources inefficiently and also, due to lack of support, many CSOs end up either giving up on their digitalisation journeys or spend too much time on digital tools that have no added-value to their organisational work.
>
> - Thus, we have seen the essential role that mentors and other experts/highly experienced people might play as well as training sessions that aim to bring experts and CSOs all at once.
>
> - One-on-one mentoring support accompanied by group training sessions are key to the success of any digital transformation plan. Without such guidance, despite good intentions, grant-based projects might easily fail and have a very limited contribution to the sustainability/survival of the CSO.

4.5 Organising Workshops and Expert Meetings

As part of the organisational development component, we designed a series of online meetings and workshops with experts to respond to the needs of our participant CSOs. These meetings were also an opportunity to learn from each other. We initially planned to host 3 different meetings throughout the programme.

Digitalisation and digital transformation consist of many fields from Artificial Intelligence (AI) to the Internet of Things (IoT), from cloud computing to blockchain. Although these topics may sound intriguing for many people, we wanted to ensure that our topics would be relevant to our participating CSOs and their members. Also, we wanted to ensure that our expert meetings would not simply be about how to use a specific digital tool. Instead, we aimed to cover wider topics such as "digital security" and "digital fundraising" and to keep the meetings less technical with real-life examples so that all the participants would be able to join. We knew that not every specific need could be addressed in such relatively short meetings. Our goal was also to initiate a fruitful conversation among the CSOs throughout our programme, which they could later continue with their own initiatives.

a. Identifying the Common Needs of Participating Organisations

In order to make the meetings relevant and informative for as many participants as possible, we first reviewed the participating organisations' project plans as well as their needs analysis documents to identify the common themes that could be covered in our expert meetings. In addition to organisational needs, we also paid attention to the individual needs and requests of team members.

We then asked ourselves the following questions:

- Which digital skills should be prioritised?

- Which digital needs can be addressed by training the core members of CSOs?

- Which digital needs might need additional resources beyond the core members (i.e. volunteers, paid freelancers or pro bono support, etc.)?

- Which needs are on the individual level or which ones are on the organisation level?

Here, it is also important to note that analysing their needs also requires an overall understanding of the skills and levels of knowledge of the participants representing the CSOs. For instance, all CSOs might select "social media" and "digital visibility" as their top priorities and ask for support. However, that does not mean that what they need is the same as one that might be targeting individuals for fundraising, whereas the other CSO might have no interest in having individual donors and instead aim to find potential project partners through their social media channels.

Since the group of participants is relatively small and easy to reach out to, our solution was to stay in close communication with all CSOs. In this way, we were able to ask them further questions regarding their needs for expert meetings while also providing them with live updates on our plans for expert meetings and workshops.

b. Determining Workshop Titles and Designing Content

After identifying and categorising the needs of CSOs, we decided to go beyond our initial plan of 3 meetings and came up with 6 separate topics to be covered in 6 meetings:

- Digital habits

- Fundraising in the digital world

- Social media management

- Digital security

- Digital rights and responsibilities

- Data 101 for CSOs: Opportunities and Risks

To find the right expert/group/organisation, it might be more convenient to first create a pool of experts specialising in at least one of the selected topics. In most cases, we preferred to make invitations to experts who also had substantial experience working with CSOs. This would also enable our group of CSOs to widen their existing institutional networks with the possibility of making new partnerships for future collaboration.

Before we made an invitation to an expert, we created a short description of each topic and presented a set of questions related to the topic. We shared a general framework of what the meeting should be about, how long it should last and what questions/topics could be addressed. The guest speakers were able to modify and add their own content before we shared the call of meetings with our participants.

c. Implementation

All the expert meetings were conducted online. To facilitate the meetings and introduce the guest speakers/facilitators, 2 project team members from STDV were present. Each meeting started with an introduction of the guest speaker(s), followed by a presentation and/or short exercises with sufficient time for (the) Q&As. Each online session would last around 1.5-2 hours in total.

The first three sessions covered relatively broader topics that could be relevant to more participants and also easier to understand and comment on. The topics such as cybersecurity, legal regulations and data management could be perceived as more technical areas. Informing the presenters and facilitators about their target group is essential.

> ### ! GOOD TO KNOW
>
> - Based on the feedback we received from some of the participants, it might be more effective to offer an intensive online bootcamp that could last 2 or 3 days where all workshops are done.
>
> - Recording sessions can be helpful to inform and support the CSO members who might miss the workshop. However, some participants might be more reluctant to ask questions when the meeting is being recorded.

05

COMMUNICATION ACTIVITIES

COMMUNICATION ACTIVITIES

Both Support Foundation for Civil Society and Turkey Mozaik Foundation work with donors and small-to-medium-sized CSOs, desiring to be a bridge between them. That is why we care about being open, transparent and accountable not only to our donors but also to CSOs, and we apply those principles to any communication between them and us. Similarly, by prioritising the needs and desires of our donors, we communicate with them under the precept of transparency and accountability, too. Hence, we publish evaluation texts and initial reports of the fund(,) (the details of which are given in the following sections of this guide), to inform our donors. While developing our communication strategy for CSOs, on the other hand, our priority is to reach as many CSOs as possible and inform them of the grant programmes we implement. In line with this purpose, we prepare the fund announcement contents, grant aim statements and grant information cards for the CSOs(,) (the details of which are given below). Finally, as a part of these communication activities, we work with a communication design agency to reveal the visual world of the fund. Therefore, the visualisation of the logo, name, social media cards or reports produced within the scope of the fund is made by this agency.

5.1 Determining the Fund's Visual Identity

In order to ascertain and manifest a fund identity, the agency designs a unique logo for each fund we announce. Similar to a business setting, a logo can help the CSOs to immediately identify the nature of the fund. It is the most visible part, which draws attention and creates the first impression on people. It can enable the target audience to later recognize and recall the fund easily, and therefore it may become the foundation of the fund identity. As the Support Foundation for Civil Society, we take the creation of the logo seriously and believe that it is a vital phase of the fund identification process.

5.2 Creating Social Media Cards

The second phase of creating a fund identity includes activities of preparing social media cards and designing Canva frames. While social media cards are used in any social media post regarding the project that is supported, the Canva frames are prepared for any visuals regarding the interviews, whose details will be explained below. We pay special attention to the colour match between the social media cards and the logo of the fund, and their titles, which should give reference to the content of any post or news regarding the fund. Similarly, for the Canva frames too, which help us to identify the interviews done for different funds, we are after such a colour harmony. **Here**, you can find the logos and social media cards we designed as part of the Digital Transformation Fund for Organisations Working on Environmental Sustainability (Digital Transformation Fund).

5.3 Preparing a Digital Page for the Fund

In order to collect all the information in a single place, including the news that would be published in the later phases of the projects, we create a digital page for each fund we launch. This webpage is accessible under the section of "grant pages" of the STDV website. You can reach the webpage we created as part of the Digital Transformation Fund **here**.

Visitors can access the following information under this page:

- A detailed explanation of the specific problem in Turkey to be tackled by the fund.

- How to support CSOs within the scope of the Fund

- The scope of the fund

- Who can benefit from the fund

- Partners of the Fund

- Application form and the call text of the Fund

- Infographic of the grants distributed as a part of the fund and the supported CSOs

- Links to the news published on the website

5.4 Content Development Process

Under this section, the content produced by STDV is meant to increase the visibility and the recognition of the fund, contribute to a culture of transparency and accountability in grant management as well as inform our donors.

We disseminate the content, whose details can be seen below, on our Facebook, Instagram, LinkedIn and Twitter accounts, also through a bimonthly e-bulletin.

a. Creating a Statement

As a first step, we develop a statement for the grant that summarises the purpose of the fund and information about the stakeholders. The grant statement is developed in a way to catch the attention of the public in the news and/or posts prepared for the fund.

Below you may find an example we created within the scope of the Digital Transformation Fund:

Digital Transformation Fund for Organisations Working on Environmental Sustainability, which we provided to support the digital transformation of the CSOs working in the field of environmental sustainability, in collaboration with European Bank for Reconstruction and Development and Turkey Mozaik Foundation.

b. Launching the Call for the Applications

This is the first post on our website and social media accounts regarding the fund to announce the start of the application process. In the text for the post, we share the link to the form of the application and its deadline, together with the grant statement.

Within the scope of dissemination activities, we also send an e-mail to the mailing list (including the organisations that have applied for any of our foundation's funds before), with the purpose of the fund, the application conditions and the deadline attached.

Finally, we ask various organisations engaged in news in Turkey to publish news on their websites about the start of the application process for the fund in order to increase the visibility and recognition of the fund. The cooperation we have developed with these organisations is entirely voluntary.

c. Last 7 Days for the Grant Application

We produce this content as a social media post to remind our followers of the deadline for the application. Below is a sample of the content we prepared for the Digital Transformation Fund.

Last 7 days for applications the Digital Transformation Fund for Organisations Working on Environmental Sustainability

Applications for Digital Transformation Fund for Organisations Working on Environmental Sustainability, which we provided to support the digital transformation of the CSOs working in the field of environmental sustainability, in collaboration with European Bank for Reconstruction and Development and Turkey Mozaik Foundation continue.

Within the scope of the fund, CSOs carry out their activities in at least one of the areas of clean water and sanitary conditions, accessible and clean energy, climate action, aquatic life and terrestrial life. Grant and capacity building support will be provided to support the digital transformation processes of CSOs in terms of corporate efficiency, communication with stakeholders and product/ service development that have the potential to generate income.

Application Deadline: March 22, 2021, at 10:00

For detailed information and application form

https://lnkd.in/eDdGYXA

d. Closing the Application

Together(,) with the news of the end of the application process, we share the number of CSOs who have applied, the legal entities of the applicant organisations (e.g. foundation, association, union), the provinces which the applications came from, and the total amount of grants requested.

e. Selecting the Grantees

After finishing the selection of the CSOs to be supported, a decision made together with our association's board of directors and the institutions we cooperate with, we share a text including the number of the CSOs to be supported and the amount of the grant they receive within the scope of the fund. The text also gives information about the areas in which those grant holders work, the projects they will develop with the fund's support and the areas in which they could enhance their capacity buildings.

You may see the "Grantees Are Selected!" news published on our website within the scope of Digital Transformation Fund in **here**.

5.5 Evaluation Text

After the fund application process is complete and the applications are reviewed, we publish an evaluation text including an assessment of the general situation of the applicants and the main needs in the area the fund provides support, e.g., in education, environmental sustainability, etc. in order to share with our partners. This text also includes information regarding the total number of applications and the amount of the total grant asked.

5.6 Initial Report

After the grant agreements are signed, we publish an initial report for the sake of transparency and accountability as well as to inform our donors

In this report, we provide not only a detailed description of the supported CSOs or their activities, but also information on the pooled fund as well as CSO-based contributions of the organisations we collaborate with within the scope of that fund. Moreover, one can find specific details about the fund structure, the amount requested and granted and the cities from which the applications come from.

You can find the evaluation text we published for the Digital Transformation Fund **here**.

5.7 Interviews

As the Support Foundation for Civil Society, we conduct written interviews with the grantees to present their organisations and activities to their donors and other stakeholders. In interviews, mostly consisting of five questions, a general evaluation of the work of the supported organisation, its field of expertise, the activities carried out as a part of the grant, and the grant's contribution to the organisation are asked. We sent the interview via e-mail to the CSO, one at the beginning of the grant process and the other at the end. We don't necessarily expect any formal tone in the answers to the questions of these interviews.

Together with the answers, we also request photos, which would publicise the organisation and its project supported by the fund.

You may see an interview we have done within the scope of the Digital Transformation Fund **here**.

5.8 Visibility Rules

a. Using of the Logos

As the Support Foundation for Civil Society, we request the organisations who receive grant support from us to place our logo, and those of the organisations we collaborate with for that specific grant, under the sections like "Our Supporters" or "Our Collaborators" on their websites. Similarly, we ask the supported organisations to include the logos of STDV and its collaborators in the printed documents, meeting materials produced within the scope of the fund, as well as in the images and videos used in digital platforms. Our last demand regarding the use of the logo is to include the following statement with it, in publications such as videos, books, reports:

"This publication has been produced with the support of the Support Foundation for Civil Society. Only XXX is responsible for its content and in no way reflects the views of the sponsoring institution."

b. Tagging on Social Media Platforms

We demand from the supported CSOs to tag us, and our collaborators contributing to that specific fund, on social media platforms while sharing any post regarding the supported project. In this way, we can re-share those posts on our social media account to support the visibility of the CSOs and their projects.

As the Support Foundation for Civil Society, we tag the supported organisations and our grant partners on our social media accounts in all our posts within the scope of the grant.

05

**MONITORING
AND EVALUATION
ACTIVITIES**

Monitoring and Evaluation Activities

A monitoring process helps the implementing team to make sure that on the ground what is intended and what is being implemented are in tandem. It is also essential to respond to immediate needs of organisations, as like every programme through time, different needs may arise to be tackled.

STDV already had a process designed and implemented to support CSOs that receive grants and organisational development support from it. With the feedback of the programme partners, we tuned this and adapted to the timeline, aim and process of this programme.

We made sure that the team interacts with each grantee CSO / contact person in periodical times. Additionally, after each reporting period, the team and the grantee CSO come together in a meeting to discuss the report and the work done in the interim period, to provide feedback to the report and to monitor the success indicators of each grant.

Evaluation of such a programme is needed not only because our team and donors wanted to see the impact that they created, but also because it creates a reflection process that enhances another learning opportunity for the organisation itself. Additionally and ideally working with an outside and independent evaluator creates a form of objectivity to the findings. Lastly, for the financial sustainability for such programmes, it also creates another level of leverage of explaining through a quantifiable story to other (potential and future) donors.

We worked with an external evaluator from the start of the programme. We agreed on the general learning targets of the programme, and, with the evaluator's help, developed key performance indicators. It is important to note that these were general and programme related indicators of impact. The evaluator organised meetings throughout the programme with grantees in general and from within organisations who are directly responsible from running this programme.

The **monitoring and evaluation report** published at the end of the programme includes the methodology, the tools used and the impact of the project

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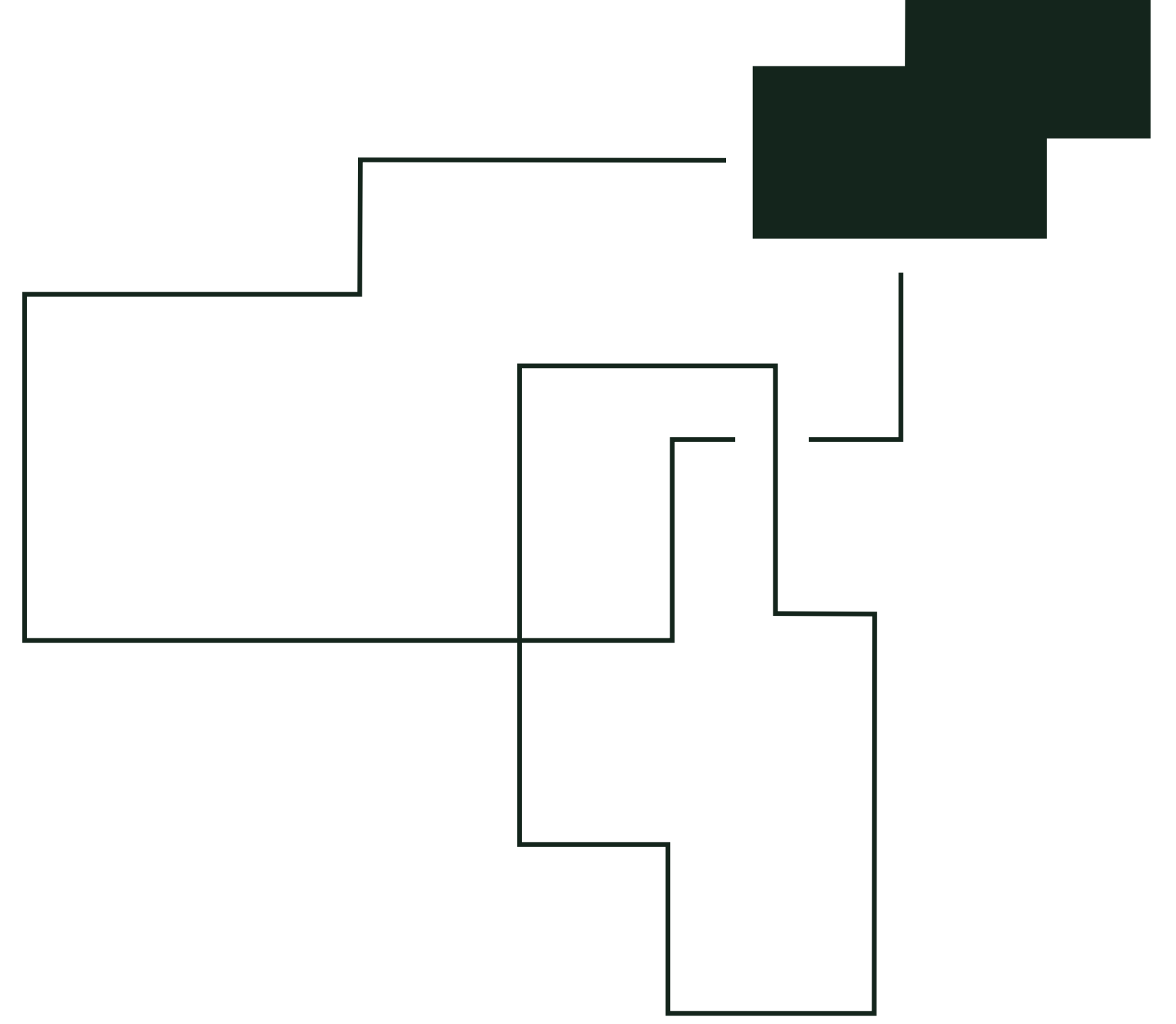
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