CANADIAN CENTRE FOR NONPROFIT DIGITAL RESILIENCE

Digital Skills Matrix

Futureproofing the Community Service Workforce

This Digital Skills Matrix describes key digital skills relevant to nonprofits at a foundational, practical and advanced level. After articulating what skills are needed for specific staff roles in Sub-activity 3.1 in the Building Data Management Capacity workbook, review the first table below to assess what your staff's current skill capacity is for relevant skills and where they may need to engage is targeted skill development.

Resources are available at the end of this document for each digital skills category. This resource list is not exhaustive and seeks not to be overly specific in terms of platform or software.

The skill groups we identified in the first iteration of this table are:

1. **Office Tools**
2. **Communication and Collaboration Tools**
3. **Marketing and Website Tools**
4. **Data Management and Analysis Tools**
5. **AI Tools (Language Learning Models)**
6. **Cybersecurity and Data Privacy**

In addition to formal resources and training options, skills development can also happen through other methods. Consider leveraging on-the-job learning in your organization through informal or formal peer learning or mentorship with existing staff.

Skill Area	Foundational *Essential skills for everyday tasks*	Practical *Skills that improve workflows and productivity*	Advanced *Expertise in automation, integration, and strategy*
1. Office Tools			
Word Processing (Word, Google Docs)	• Open new or existing file and draft document • Format text • Add tables and images • Use spell check	• Format document using headers for navigation • Set up a style template • Use tracked changes and add comments • Use downloadable templates from the internet	• Mail merge • Insert complicated text or image elements
Presentation (PowerPoint, Google Slides, Canva)	• Open new or existing file and create presentation • Format slides using pre-existing formatting options • Insert images or icons • Use spell check and add comments	• Create slideshow theme to apply to entire file • Create icons or diagrams from scratch • Use speaking notes and presentation mode with timer	• Record slide show with voice over • Add video elements to slides • Add charts or visualizations based on data from spreadsheet program
Spreadsheet (Excel, Google Sheets)	• Open new or existing file and input data • Use column headers to filter data • Identify duplicate data • Format column headers and numbers (i.e. currency, percent, dates) • Insert basic math functions that reference cell data • Save as different file types (e.g., CSV, PDF)	• Select/use available formulas • Use conditional formatting and data validation • Use data validation to prevent input errors (e.g., dropdown lists) • Use pivot tables for analysis • Collaborate on shared spreadsheets in real time • Use shared templates for standard tasks (e.g., budgets, project trackers)	• Use basic lookup functions to reference cells in workbook or spreadsheet • Use Macros or PowerQuery to automate repetitive tasks • Link/reference data from other spreadsheets or files (e.g., budget linking)

2. Communication and Collaboration Tools			
Email (Outlook, Gmail)	• Open, reply, reply all to emails • CC and BCC recipients • Send a meeting invite and check other's calendars for availability • Change view settings	• Set up folders and rules to redirect emails to folders • Block senders and review junk folder for non-junk emails • Set up reoccurring meetings	• Set up POP email service and/or inbox forwarding • Automate email workflows (e.g., auto-replies)
Video conferencing or chat	• Open and sign into video conferencing tools on desktop, web, and phone • Schedule meetings or messages to be sent out at a future date	• Set up and initiate breakout rooms • Identify and add auxiliary apps for intended purposes (e.g., transcription apps, calendar integration) • Use screen sharing and collaborative whiteboards during meetings	• Use AI features to summarize chats and create action items • Manage team permissions and control meeting settings (e.g., host delegation, muting participants automatically)
Sharing documents on the cloud	• Create and save files to a shared drive • Access sharable link	• Set security permissions for single files or folders • Remove permissions to a file or folder • Grant access to files or folders upon request	• Create, monitor, and administer cloud file-sharing services (e.g., SharePoint Admin or Google Docs Admin) • Automate file-sharing workflows with integrations (e.g., syncing files with CRM or project management tools)
Whiteboarding and other collaboration tools	• Identify and select appropriate collaboration tool for purpose • Log in and set up permissions for document	• Invite others to collaborate or provide visitor link • Export collaboration output	• Use private mode/anonymous features • Create and manage templates for collaborative workflows

3. Marketing and Website Tools			
Website management	• Use basic no code website management tools and CMS. • Update website to ensure it is mobile responsive	• Incorporate basic HTML/CSS elements as required (e.g., embedding a video) • Use website metrics to increase usability (e.g., track page load times) • Scope and design website templates from scratch using no-code tools	• Create a custom website or modify themes/templates with advanced CSS or HTML • Leverage website analytics and reporting tools to guide UX improvements • Implement complex SEO optimizations to increase visibility
Email Marketing	• Draft and configure email campaigns using email distribution tools • Manage recipients and confirm consent • Track open rates for emails Draft email	• Segment recipients for targeted campaigns (e.g., by donation history) • Set up A/B testing to optimize subject lines or email content • Use customizable tracking links to measure engagement	• Configure full email campaign with follow-up sequences • Integrate email tools with CRM systems for personalized communication • Cross-reference CRM data with engagement metrics to identify trends
Social media	• Log into social media platform • Draft content and schedule for future posting • Access and review engagement metrics	• Use social media coordination software to manage cross-platform posting • Create a social media strategy and identify metrics • Use paid ads features to increase reach	• Adjust campaigns in real-time based on metrics • Calculate ROI on paid ads and engagement • Develop multi-platform campaigns integrated with other marketing tools (e.g., email marketing, CRM data)
SEO (Search Engine Optimization)	• Log into SEO tool or website feature and locate keywords • Add and manage new keywords as needed	• Develop an SEO strategy that includes keywords and informs content on website • Leverage built in reporting tools to improve website UI, content, and architecture	• Edit and update meta data of website to meet SEO needs • Identifies and implements more complex SEO tracking metrics

4. Data Management and Analysis Tools			
Data Management (CRM and Data Systems)	• Access summary reports and dashboards • Export information as needed • Create, edit, and update data entry fields • Check data quality using basic reports • Set up a data table in spreadsheet software	• Create, edit, and update summary reports and dashboards (e.g., to track metrics over time) • Bulk upload data from spreadsheets to data systems • Identify linking variables across tables for simple lookups (e.g., ID matching) • Articulate data relationships and schemas	• Implement APIs or automation to streamline data flow between systems • Export CRM data and combine with external datasets for deeper analysis • Design database schemas (e.g., Salesforce or relational databases) • Work with unstructured data (e.g., text, media)
Data Analysis (Spreadsheets and Programming Tools)	• Perform basic analytical functions (e.g., sum totals, averages) • Identify and remove duplicates • Filter and sort data for reporting • Summarize key findings and create basic reports using spreadsheets	• Transform, clean, and merge data for deeper analysis • Use formulas to create summary variables (e.g., calculate age from birthdate) • Use basic statistical tests (e.g., t-tests) with spreadsheets or programming tools • Rename variables and modify data types for consistency	• Perform longitudinal analysis to track trends over time • Create workflow scripts for data cleaning and transformations (e.g., Python/R scripts) • Perform predictive analysis (e.g., forecasting models using R or Python) • Create interactive dashboards with Power BI or Tableau
Data driven decision making and insights	• Read and understand basic reports generated by data systems • Recognize metrics used for funder reports, marketing, or program delivery	• Identify metrics aligned with organizational goals • Identify missing metrics needed to track progress toward goals • Use data for status updates or to guide operational decisions	• Create a multi-year monitoring strategy aligned with strategic goals • Use advanced metrics to inform impact measurement frameworks

5. AI tools (Language Learning Models)			
AI Literacy and Usage	• Identify and select appropriate AI tools (e.g., ChatGPT, Copilot) for specific tasks • Construct prompts that generate usable first drafts for emails, reports, or communications • Confirm the accuracy and relevance of AI-generated content • Ensure no sensitive or confidential data is entered into open AI models	• Reference AI outputs appropriately in reports and presentations • Understand and apply ethical considerations for responsible AI use (e.g., bias awareness, transparency in AI-generated content) • Evaluate new AI tools and assess risks (e.g., security, bias, compliance)	• Contribute to the development of AI usage policies • Facilitate staff training on ethical AI use and best practices • Assess the risks and security of AI adoption (e.g., compliance, bias risks, and privacy concerns)
AI Integration and Workflow Automation	• Use AI-powered tools (e.g., Copilot, ChatGPT) for small, automated tasks (e.g., summarizing meetings, generating follow-ups) • Explore pre-built AI features (e.g., automated replies, email drafting) to assist with daily activities	• Integrate AI tools with other platforms (e.g., CRMs, project management tools) • Create simple workflows that automate tasks (e.g., AI-generated reports sent via email) • Use tools like Zapier to connect AI to existing systems for automation	• Fine-tune AI tools using internal organizational data to generate more relevant outputs • Develop custom AI solutions by leveraging APIs (e.g., connecting OpenAI tools to a CRM system) • Contribute to AI governance frameworks by aligning automations with organizational strategy

6. Cybersecurity and Data Privacy			
Cybersecurity Practice	• Identify a phishing email • Report phishing attempts to IT or the appropriate team • Block senders of phishing emails	• Train colleagues to identify phishing emails and report them correctly • Conduct phishing tests to assess staff awareness • Understand how to reset passwords and set up recovery methods • Enable and use multi-factor authentication	• Implement password managers and ensure passwords are shared securely through these tools • Develop organization-wide training programs on phishing prevention and secure password practices • Monitor and evaluate the effectiveness of security practices
Data Privacy and Software Assessment	• Understand and assess what data will be shared with app and how it will be shared • Review privacy policies or data use policies to assess if data aligns with organizational practices	• Assess if data is encrypted at rest and in transit before adoption of new software • Determine if data will be transferred across jurisdictions (e.g., stored outside of Canada) • Monitor and track the privacy policies of existing tools to ensure ongoing compliance	• Contribute to or develop organization-wide data privacy policies • Conduct risk assessments for new software to evaluate potential security and privacy risks

Resources for Addressing Digital Skill Gaps

This guide provides a curated list of practical resources aligned with the Digital Skills Matrix to help staff efficiently develop digital skills. It streamlines learning by offering recommended starting points for each skill area. While the resources are not exhaustive, they provide clear starting points for learning, making it easier to focus on relevant tools and build competencies effectively.

Category	Subsection	Learning Focus	Tool/Resource
Office Tools	Word Processing	Creating, editing, formatting text, using styles, collaborating on documents, and utilizing advanced features like mail merge	• Word help & learning • Google Docs Help Center
	Presentations	Creating slides, adding content, formatting, presenting, and designing visually appealing presentations (consider Canva for advanced visuals)	• PowerPoint help & learning • Google Slides Help Center • Canva Learn
	Spreadsheets	Data entry, basic formulas, formatting, data management, and utilizing advanced features like pivot tables and macros	• Excel help & learning • Google Sheets Help Center • Excel for Nonprofits - Data Management and Reporting with Pivot Tables and more
Communication and Collaboration Tools	Email	Sending, receiving, organizing emails, managing calendars, and utilizing advanced features like filters and automation	• Outlook help & learning • Gmail Help Center
	Video Conferencing	Conducting online meetings, using chat features, screen sharing, and utilizing advanced features like breakout rooms and recording	• MS Teams for non-profits • Google Meet Help Center • Zoom help center
	Cloud Sharing	Storing, sharing, and managing files in the cloud, setting permissions, and collaborating on documents	• OneDrive Training • Share files from Google Drive
	Whiteboarding Tools	Brainstorming, mind mapping, and facilitating visual collaborations. Miro works well for various collaborative activities and integrates with other tools	• How to use miro.com
Marketing and Website Tools	Website Management	Using website builders and content management systems to create, update, and manage websites	• Building a Nonprofit Website
	Email Marketing	Creating, sending, and tracking email campaigns, managing email lists, segmenting audiences, and using A/B testing to optimize email content	• Email Marketing for Nonprofits and Libraries Bundle
	Social Media Management	Creating and scheduling social media content, engaging with audiences, tracking social media metrics, and managing social media presence across multiple platforms	• HootSuite Platform Certification course

	SEO	Understanding SEO principles, conducting keyword research, optimizing website content for search engines, and using SEO tools to track performance and improve website ranking	• SEO for Nonprofits • Google Search Console Tool
Data Management & Analysis Tools	Data Management	Working with Customer Relationship Management (CRM) systems and other data management tools to input, organize, clean, and manage data	• Nonprofit Tech Management Course For Accidental Techies • Getting a Good Return on Your CRM Investment
	Data Analysis	Analyzing data using spreadsheets and/or programming tools to identify trends, patterns, and insights	• Data Analytics for Nonprofits • Excel for Nonprofits - Data Management and Reporting with Pivot Tables and more
	Data-Driven Decision Making	Using data to inform strategic and operational decisions, track progress towards goals, and measure impact	• Build Better data in Action • Impact Measurement - Simple Measures, Big Results
AI Tools	AI Literacy & Usage	Develop a foundational understanding of AI tools like ChatGPT and Bard, including constructing effective prompts, evaluating outputs, and applying ethical considerations	• AI for nonprofit decision-makers • Ask the Experts: Focus on Ethics, Principles, and Governance of Generative AI
	AI Integration & Automation	Learn to integrate AI tools into daily workflows for tasks like summarizing meetings, generating content, and automating replies. Explore platforms like Zapier to connect AI with existing systems	• Zapier Learn
Cybersecurity & Data Privacy	Cybersecurity Practice	Learn to identify and respond to cybersecurity threats like phishing emails, practice secure password management, and use multi-factor authentication to protect accounts and data	• The Cyber Readiness Program • Gophish
	Data Privacy Assessment	Understand data privacy principles, assess the risks of new software, and contribute to organizational data privacy policies	• TechSoup CyberSecurity Resources