

Champions for Social Good Podcast

Technology Adoption in the Philanthropic Sector with Lisa Pool, Technology Affinity Group (TAG)

Jamie: Hello and welcome to the Champions for Social Good podcast. The podcast for people dedicated to social impact. I'm Jamie Serino, Director of Marketing for the MicroEdge division of Blackbaud. I'm here today with Lisa Pool, part-time Executive Director of the Technology Affinity Group, also known as TAG. Lisa has worked in the non-profit sector for most of her career and was notably the Chief Information Officer of The Pew Charitable Trust. Lisa has also worked for the Foundation of Financial Officers Group and has consulted with many organizations in our sector, helping them with their technology strategies and grant-making software implementations. Welcome, Lisa.

Lisa: Hi Jamie, thank you for having me today.

Jamie: Yeah, thanks for being on the show. We're really looking forward to exploring a few topics with you. Can you first start off by just telling us a little about TAG and its mission?

Lisa: Sure. TAG is a membership organization for technology professionals in philanthropy. Our mission is to promote the power of technology to advance the goals of the philanthropic sector. Our members are people responsible for technology, not necessarily trained technical professionals, but at least having some oversight of IT or grant management software.

Jamie: So what is TAG's take on the sector's use of technology today?

Lisa: Based on our most recent survey data, most foundation executives still are not comfortable with technology, and do not totally get the benefits of technology. When we asked our survey respondents how they would describe their foundation executive's comfort and understanding of IT, only 19% indicated they felt their executives totally got it. These numbers haven't really changed much in the last 10 years. We continue to see so many inefficiencies in the foundation sector. Based on our sample size of TAG member foundations, only 6% of our survey respondents described themselves as leading edge with respect to technology adoption. And a full 38% described themselves as lagging behind or in trouble, with respect to adoption. As a vendor in this sector, I'm sure you know it takes quite a while. Often many months or even years for foundations to make decisions regarding software purchases or upgrades. I think this is because foundations are not in a competitive business, so there really isn't any market pressure to improve processes.

Jamie: Right, right.

Lisa: Yet there's a huge focus on non-profit performance and measuring impact. So, I think we're gonna see a requirement for foundations to become more transparent and efficient too. In essence, to start practicing what they're preaching.

Jamie: Yeah, I think we're seeing a lot of that same thing too. So what would you say TAG is doing about this? How is TAG addressing this?

Lisa: The TAG board recently voted to expand the Simplify Initiative, from a focus on primarily one project to a much broader focus. And that will be promoting awareness, educating funders, and increasing adoption of all the technology tools relevant to the grant-making life cycle. And this includes tools for sharing funder data, sharing non-profit data and tools for funder process improvements. There have been many tools and data projects developed in recent years to help foundations streamline their operations. But what has been missing is a single place to find information and help about all these projects and tools. It's really hard to understand

which products to use when, and there really isn't any place to go to figure out which tools make the most sense for your foundation. Just to give you an example, TAG partnered with GuideStar to promote data sharing of non-profit data into the funder grant applications. When we started approaching funders about adopting this GuideStar for grant applications product, many funders were either unaware of the product or didn't understand the difference between GuideStar for grant applications and GuideStar's other products such as Charity Check and Financial SCAN. So there's a real lack of understanding and knowledge about these tools in the sector. So TAG is gonna have a two-pronged approach. First, we're going to create a knowledge center that will include a description of each tool, case studies, discussion area...

Jamie: That's great.

Lisa: A blog, recorded webinars.

Jamie: Nice.

Lisa: And we envision this knowledge center to become the go-to place to learn about all the relevant tools for foundations to use. Second, we're gonna provide some direct support to help foundations find the right tools for their organizations. And I'm really excited, we've just contracted with Poney Carpenter to serve as the Initiative's Project Manager. We've never had a dedicated staff resource for the project. Poney will be reaching out to foundations to offer guidance and he will staff a help desk for foundations to call with questions about all of the tools. He's got a ton of experience in database development and data sharing in the sector and we think he's gonna be a really great fit for the project.

Jamie: Yeah, I agree. We know Poney and it sounds like he'd be a great fit. So, in general, with the issues that the sector's trying to solve, it seems like TAG sits in the middle of it all, and can have a significant influence. Can you tell us a little bit more about TAG's position, the voice in the sector, and the impact that that organization can have?

Lisa: Sure. Well, TAG is a community of technology leaders and philanthropy. And we think we can help our members be successful by providing the education awareness of appropriate projects and tools. TAG is uniquely positioned to focus on adoption because of its relationship with its members, the vendors and infrastructure organizations like the Foundation Center, TechSoup, and GuideStar. Since TAG has no vested self-interest and is not selling a product, we can truly be an independent party interested in supporting the best interest of the sector. And that's really what makes us unique. Eventually, we hope TAG's role will evolve to be more actively included in governance for some of these sector efforts, and organizations developing and selling products have an inherent conflict of interest when setting data standards for the sector. And that's why we think it's important for TAG to get involved at some point.

Jamie: Okay. So when it comes to performance, measuring impact, being more transparent, these are the things you touched upon earlier, could you tell us a little bit about what you're seeing with regard to outcomes and impact measurement in our sector?

Lisa: I wish I was seeing more. I know many... [laughter] I know many foundations are working on trying to figure out how to measure their impact. At a recent TAG conference, we had a panel of some of the leading vendors who have recently released impact measuring capacity into their software, and foundations are beginning to look at these new products. The hard part for foundations though, is figuring out what to measure, especially with respect to outcomes and qualitative information versus outputs, which are obviously a lot easier to measure. There are some foundations who are further along than others.

Lisa: I've seen the European Climate Foundation and New York State Health Foundation Systems to name a few. I think one of the biggest issues for foundations to agree on is using a common language. Without a common language, it's like having accommodative standard. It is impossible to measure impact sector wide. So I think we're going to see more foundations figuring out how to measure their own impact in 2017, but I think it will be many years before we see sector-wide measurement. I say this because foundations have been

coding grants for probably 20 or 30 years, and there's still isn't a common coding taxonomy used by all foundations.

Jamie: Yeah, so certainly a challenge to overcome. So do you see any progress in that area that would make us feel a little bit encouraged, let's say, about the next few years?

Lisa: Well, I do see efforts underway to come to agreement on standards. I just think it's a really difficult thing to do and it's going to take awhile.

Jamie: Yeah, agreed. Okay, so Lisa, one final big picture question for you. What do you see as the biggest challenges for the next couple of years? What does TAG see as some of the biggest challenges?

Lisa: Well completely switching gears, I think security is going to be the primary challenge. Foundation technologists are really worried about everything from educating employees about phishing, to preventing attacks from foreign governments. So I think that that is the number one challenge, but other challenges include measuring impact, which we've been discussing, moving applications to the cloud, and continuing to gain efficiencies in the grant making life cycle.

Jamie: Yeah, we're seeing a lot of those same things too. One added question for anyone that was considering joining TAG, what would you say to them?

Lisa: Well I think TAG is a fantastic resource, especially if you're new to the sector. You can meet your peers, it's a really collaborative collegial organization, because it's not a competitive market, so foundation people are really willing to share information and help each other. And I think the value of the network is immeasurable.

Jamie: Great. Alright, Lisa. Thank you for your time and your insights today.

Lisa: Thank you, Jamie.

Jamie: For our listeners, to learn more about TAG, you can visit tagtech.org. Or follow them on Twitter @tagtechorg. To learn more about the Simplify Initiative, please visit simplifynow.org. Make sure to subscribe to the Champions for Social Good podcast so you don't miss an episode. And you can keep up with the conversation between episodes by following us on Twitter @jamieserino, @MicroEdgeLLC, and @blackbaud. Thank you for listening.