



Tim: Welcome to the Untapped Philanthropy podcast where your hosts Fluxx's co-founder Kerrin Mitchell and Neon One's, Tim, Sarrantonio, we've spent our career learning how to leverage technology and data in the social sector to better connect and serve our collective causes, constituents, and communities.

Kerrin: In this podcast series, we've profiled leaders, public figures, philanthropists and industry experts to explore the fascinating intersection of funding, technology and policy. We're here to analyze the most formative topics and trends that shape the present and future of lift.

Tim: Welcome to this episode of Untapped Philanthropy. One of the main things that always happens at the beginning of a new year is trends and articles that come out that tell us what we should be paying attention to. And a lot of times I personally roll my eyes, but there is one group in particular that I do not roll my eyes in the least and that's the Technology Association of Grantmakers, TAG. And so we're thrilled to welcome Chantal Forster here, Kerrin, why don't you take it away and introduce Chantal.

Kerrin: So I love that I get to play the role of color commentary on Chantal. She is a longtime trusted advisor in the philanthropy space. She is a dear friend, and I find her perspective, as the executive director of TAG, she sits at this unique perspective, this unique intersection of technology, community building, even bringing intelligence around where the market's going and doing so from the voice of the masses. I think she does this with a courageous collaborative spirit. I cannot wait to have her on today. Chantal, thank you for joining us. I'm so excited to hear what you've uncovered!

Chantal: Kerrin, I'm delighted to be here. Thank you for having me. Tim, thank you so much for kicking us off. As you noted, Kerrin, I'm Chantal Forster, the Executive Director of the Tech Association of Grantmakers, which fundamentally serves as the voice of technology in philanthropy.

Kerrin: And in that you've obviously had a long career, and actually, a lot of different facets of philanthropy, both on the grant making - grant seeking [side]. You've been all over that. Tell me a little bit about your career here so that we put a lens forward to the audience of what you've actually seen and how you're reflecting that through in your comments today.

Chantal: Oh, I'd be happy to. It's funny, I just gave a talk this morning. I was invited to give a talk on the nonlinear career path, and so I'm sort of the poster child for a nonlinear career path. I started in the private sector, for a predictive analytics firm SPSS that is now owned by IBM. I started in the private sector, worked in the public sector in Albuquerque, New Mexico, running the digital team for the mayor of Albuquerque. I then ran digital for the Bioneers, a nonprofit, and at some point, moved into the philanthropic side of the house. I started a consulting practice in New Mexico, and was doing some work for the McCune Charitable Foundation in Santa Fe, and then also the Kellogg Foundation, which had an office in Albuquerque, that's one of their priority places. So I find that it is really advantageous bringing together those three different sectors in my work now through TAG.

Tim: Well, what I love about that is it also does in many ways, parallel, the typical lived experience of many folks in our sector. I talk about how we all end up on the island of misfit toys of philanthropy. When you get down to it, right? One of the things that I love asking is, during that journey, and even before it, is there a moment of generosity that stands out to you, that



you've experienced? Now, I know we're going to get into some amazing work that's happened professionally and things like Community Foundations, for instance, that's one of the trends that we can unpack. So on a personal level Chantal, is there a story that you want to share about a moment of generosity that stands out to you?

Chantal: Tim, you know, I come from a family of givers, and not always givers when it was convenient to give - so I think a couple things stand out. First of all, I remember my grandparents. My grandfather was the first person to go to college in his family. He went to West Point, he had a successful career and so did my grandmother, and at the end of their careers, they were devoted volunteers. I remember them, every year, going to the veterans home in West Lafayette, Indiana, and doing taxes. Volunteering to do the taxes for veterans in that community. So that's just one example of the many ways that they gave. But it's a story from their life that as a child [that] really shaped me and clearly it shaped my parents as well. My parents are devoted givers. And there were times when I was growing up - my father was an engineer at the steel mills, in the Great Lakes region - and as you know, the story of steel in America, many steel mills closed in the 80s. So my father was laid off, as a steel mill would close, a classic story for many people working in steel. And yet, I remember them continuing their commitment to give. In this case it was their faith community, but they were committed to giving a significant portion of their income away. I think that this really has shaped me and my belief in doing what we can to give back and really giving with abandon.

Tim: I love that. I would say what stands out to me is there's always a consistency in the humanity that always comes through. And just that inherent drive of people who, humans are social creatures at the end of the day, and there's more that unites us than divides us. I think we saw that's especially true in the pandemic, because I live in the individual giving world, right? I started my career as a grant writer, but I didn't work at a foundation or anything like that. So you always hear these doom and gloom, USA Today things - individual giving keeps going down, US households aren't giving as much anymore - but the numbers keep going up. The generosity is still there. What I noticed is, especially in the foundation world, there was something different going on. So I'm personally really excited about this topic. Because I think it's something that especially the audience that I typically work with, doesn't know about. So really, really excited for today.

Kerrin: Right. I think the fun part here is that the perspective is, not only are they interesting trends that are going on around some of the funder community where people are talking about, but, the lens that Chantal can bring, obviously nonprofit public sector, that will highlight to us, some of the things that I think just a general report out of, this is what funders are talking about, wouldn't get. So Chantal let's dive right in. TAG is unique. It has a base of 3000 members, 400 grant making organizations split across many, many continents - North America, Europe, UK, all that. It's the voice, in many ways, of tech and philanthropy. And it offers this perspective to roll up these trends. So you published a report called the 2023 philanthropy tech trends. In that, I actually do want to go into the six areas. I know you and I talked like "well, what should we focus on - one or two of them?" I'm kind of thinking we need to do all six, at the risk of restating your list robotically. I do want to call each of them out and we just hit right through them. I'll do the six up front first so you guys have a little mind map of where we're going. The first one is the philanthropies role in our tech future. Second is coworking space for remote philanthropy. The third is values moving from conversation to implementation. The fourth is data moving from the fringe to the forefront, the fifth customer experience coming to philanthropy. And the last one, which is very interesting as well, as learning from Community Foundations responsiveness. Those are the six, that was a lot, so we're going to unpack them one by one, and lift up some of



the key ideas that I think Chantal and her team uncovered. So let's start from the beginning - tell us about how you view philanthropy's role in our tech future and how that's evolving in 2023.

Tim: Small topic, small topic not a big one

Kerrin: Holy grail of giving.

Chantal: Yeah, we'll cover in a nutshell in 30 seconds. So you may recall, there were a couple of high profile dissolutions or firing of teams at big tech teams - like Meta's responsible innovation team. You may recall last year that this team was dissolved. So one of the topics we talked about at the TAG conference in November last year in San Antonio, was about a framework for responsible tech innovation. And we, in light of the private sector's abandonment perhaps, or seeming abandonment of a responsible tech framework, the philanthropic sector started asking itself questions around - if not the private sector, then who? Who is responsible for a framework that is responsive and responsible in terms of tech and innovation? Perhaps it is philanthropy. So on stage at the TAG conference, we wrestled with this. Cory Darden Milam, she's the CTO at the Rockefeller Foundation, she was one of our panelists. And she asked the question - what would it look like for philanthropy to build this framework for responsible tech, with metrics that are providers from the private sector, our folks who build our grants management systems, our security platforms, what would it look like for us to build a framework for responsible tech and hold those folks accountable? It's a very important question. If the private sector is no longer considering this part of ethical operations in our society, perhaps philanthropy should pick up that thread and carry that work in the future. One of the things, if we do decide to move forward with a stake in a responsible tech future, though, is that we as funders need to become a little more comfortable with failure. This is what Kevin Bromer, the head of data and tech strategy at the Ballmer Group, another funder said. He said on stage at the TAG conference, that we as funders need to get comfortable with redefining and even funding failure, especially if we're going to move into the tech space. And, Tim, I think you'll find this heartening, Kevin also cautioned funders to do that, to redefine and fund failure, in partnership with, arm-in-arm with nonprofit partners. So to redefine together with nonprofit partners, and accept, with eyes wide open, that sometimes things will fail, but that's what innovation looks like,

Tim: I have a ton of thoughts here. And I know Kerrin, you will too, I'll try to keep mine tight. I love all of those. The doubting Thomas in me, in some ways, is that I continue to see market moves on the for profit side, especially where the financial technology entering the space, for instance, where it's like we're going to unlock generosity. It's all the weird stuff that comes with individual giving, that funders typically don't realize is happening or they're not paying attention to. Basically, the version of pay away loans now has come to the individual giving space where people are like getting a loan to give money to a nonprofit. And if they default it, they go to collections. Awful. I hate it. And this is what's being presented as innovation when in reality, we need to be talking more, one with funders about this as opposed to just relying on the for profit side to bring the solutions. So 100% behind all of these statements. The other thing that I get concerned about is, I actually came and asked our community, we have a Slack community of nonprofit professionals. And we represent the 97% of the nonprofit space that is under \$5 million in revenue and below. We have to remind ourselves that, like only 3% is above 5 million. And so, one of the concerns that somebody brought up was, as this innovation moves, for instance, toward a digitization of applications, as an example, where do these under resourced nonprofits who somebody literally said, Apple told me I'm being forced to upgrade my laptops, I do not have money for this. Like, where do those people fit? Because there's an element of



equity and accessibility that has to get addressed here. So what are people talking about on your side Chantal, I'm really fascinated and interested about that.

Chantal: We can spend the whole podcast here! So at the TAG conference, I convened a group of funders who have emerging interest in funding Nonprofit Tech, and not the classic programmatic tech, like here's your mobile app to help with homelessness, provisioning of resources, but operational tech, so what you just described, ensuring that the starvation cycle for nonprofits is ended specifically in the areas of tech infrastructure for those nonprofits. So there are a growing number of funders who are interested in this. So actually TAG is working on a white paper of emerging best practices around funding tech, and I can give you the preview - some of what we're seeing from these funders who are funding operational tech, is thinking about that tech funding as a cluster of a three part framework of strategy, skills, and tools. So no longer just funding the tool itself, but funding some strategic assessment, funding skill building, and funding the tools and the onboarding of those tools. So that's one emergent best practice. The other one is around funding as a cohort so that nonprofits in need of operational tech are also developing in-cohort relationships to create a mutual support society around operational tech. Then the third trend, one of the other trends we're seeing, is around provisioning direct services for technology support for implementation, for example, through perhaps a nonprofit intermediary. So funder X might fund nonprofit intermediary Y, to provide some direct services to nonprofit grantees to support their implementation of technology. So watch for that white paper to come. The goal in sharing that is that more funders have a framework to jump on board with funding this kind of technology for nonprofits,

Kerrin: What I find really compelling about that, and Tim, thanks for bringing that up, because oftentimes, we are almost myopic sometimes on the funder side of thinking, programmatic expense - non programmatic. When actuality when we talk about, and Chantal you know this more than anyone, that those digital infrastructure variables, the factors that play into someone's ability to step into this realm, and move philanthropy forward are going to be things like rights, equity, access, tools, data, resourcing, skill sets, all of those things come into play. So I think it's great that we brought that up, because I think, to your point, it's bigger than just saying, in many ways, we're going to move forward and fund or invest in certain pieces, but it comes into the policy, the structures, and those even operational aspects that make the success of it's something that we can all get behind and understanding that that's a larger, you know, swatch of things that we need to consider. I think that's where we often forget. So I'm glad you guys both brought that up.

Tim: I think what's happening, and I have so many things to the point Chantal, like, stay on after the podcast is done, because I want to talk to you about something. I am so thrilled, not only to hear that, but that I think what's happening is, it's almost like there's this collective consciousness that's activating for people who are like, who get it. And we're all having very similar conversations, because we see the same problems happening over and over and over. And I just love it, I love it. And where I think the divide is, is that the for profit side of things, can really muck up the narrative. Because at the end of the day, the metrics of success between our sector and the for profit sector are completely different. They're not the same. And that's where the inherent misunderstanding is.

Kerrin: And that's going back to your Kevin Bromer quote, something I think that's really compelling, which is this idea of, we will find failure and the root cause of it could be any number of things. Like you said, it could be the upgrades, it could be access, it could be a number of, you know, unexpected places where operational things need to be rebooted. But you have to be



able to invest in that try, like you said, invest in, in redefining and funding failure so that we understand why things aren't working. So I'm with you there. I think that's a very interesting concept around the role that we can play and being able to sort of help steward some of those conversations and some of those trials, right?

Tim: One of the, and kind of that does connect into the next trend, because one of the things that individual smaller nonprofits, especially as they don't have the margin for error for experimentation even and that failure. And what I was so excited to hear about is the rise of coworking for remote philanthropy. So could you unpack that trend a little bit more, because I think what's going to happen as an output is, people are going to be able to talk with each other and feel more comfortable. Because at the end of the day, a lot of these folks are scared to even ask for money, or to use technology, because it could get them fired if they make one wrong move. And I think coworking can be one lever here. But what's your perspective Chantal?

Chantal: Tim, I'm going to pull a thread that you introduced in the last trend around - wow, everybody suddenly gets it around funding Nonprofit Tech. The same cause is what has prompted this coworking space trend. Guess what that was? The pandemic. The reason why, in my opinion, funders are starting to pay attention to funding nonprofit operational tech is, they just had to live that themselves. They just felt what it feels like to not have online collaboration tools, to not be able to work remotely, to not be in the cloud. For foundations that themselves were lagging. And keep in mind foundations also under invest in technology. So nonprofits and foundations both invest less in tech than private sector partners. So foundations just had to walk that walk themselves, which now has opened everyone's eyes into realizing what reality has been like for their nonprofit partners. And it's a wonderful gift, if I can call it that, gift of the pandemic, that we see this realization. The other thing that changed is, we never thought philanthropy would go remote. How many foundations swore by, you know, "everyone in the office" policy, we found in our state of philanthropy tech survey last year, that 77% of foundations, 77%, are enabling a hybrid or hybrid slash remote workplace model. That's shocking. I was shocked to see those findings. Even more shocking is the fact that for small foundations, so small grant makers, let's say under about 25 million in assets, 64% of them are going fully remote. 64% of small foundations are going fully remote. I see this as a real opportunity to create coworking spaces for philanthropy. TAG happens to participate in a coworking space for philanthropy here in Chicago. Our office is part of the Impact House here in Chicago, founded by Israel Idonije. It's a coworking space for philanthropy. I see a beautiful marriage unfolding here between big foundations with extra space now that they're hybrid and small foundations who've chosen to go fully remote. The big foundations can repurpose that space, create perhaps a hotelling option for other grantmakers in their region to come in for their monthly meetings or quarterly meetings, board meetings, staff retreats. Invariably, those small funders will have the need for physical space from time to time. And big funders happen to have a lot of space on their hands right now. So I predict we'll actually see the creation of these hotelling options, coworking models offered from big philanthropy.

Tim: Well, and I think what's beautiful about that is that in a parallel situation, I have a coworking center that was founded by the United Way here in upstate New York. And I also used to live in Chicago, and there used to be even a literacy focused one. And I think what the pandemic showed is, you have to be able to move these types of things into execution and sustainability, where it's not just an idea, it has to actually last and go the distance. And those big anchor organizations always are where it's successful with coworking. But I think there's a broader conversation on moving those values that people talk about into the actual implementation. So that kind of naturally gets us into the next trend, actually, can you unpack



these larger conversations around people saying and then acting on the things that they believe?

Chantal: Well, if you were at the TAG conference in November in 2023,

Tim: Well I need to go, it sounds like, by the way.

Chantal: if you've been there, you would have heard a great deal of fatigue with conversation. It was a very common theme. And I think this is again, born of the pandemic. There was a palpable theme around - alright, stop talking, let's start doing. What does it look like to implement? What does it look like to move from conversation, to collaboration to implementation? Even some emerging fatigue around collaboration, right, because philanthropy can get hung up on collaboration a little bit. So there's really a driver right now, to get from talking about values, to living those values to operationalizing those values. Oftentimes, we keep those values conversations on the program side, and we don't include our operational staff in philanthropy. In those conversations about how do we actually live this. I'm thrilled. I think the indicators are very positive here. Two years ago, three years ago, you saw major foundations talk about the overhead myth, right? Sloan, McArthur, Ford, there was a big press release and a movement around dispelling the overhead myth and funding operations, right? It took us the pandemic, to really understand what that means. And so earlier we spoke about the exuberance -a growing exuberance on funding Nonprofit Tech. That is a direct result of the burning desire to move from conversation to actually doing something about it. Stop talking just about overhead myth, and actually, fund the boring infrastructural things that you would consider overhead. So I'm pleased to see that. I'm also seeing two more areas. A desire to move those from values to implementation, number one is trust based philanthropy and the tension, the perceived tension that some people see around being an evidence based grant maker. Many foundation's boards want them to be evidence-based grant makers. And then some members of the board or the staff would like to shift more towards values based grant making. And there's a perceived tension that you can't do both. And so what we're seeing, TAG is actually working on this right now with the Trust Based Philanthropy Project, recommendations for grants management system providers to actually enable some very boring field level, functionality level product enhancements that help operationalize a trust based set of values. So I think that the operationalizing of that, while also understanding you don't have to stop being an evidence-based grant maker, that these are two ways that we're seeing trust based philanthropy move into actual implementation.

Kerrin: I think that's one of the things that I've always, I don't want to say I was challenged by, but our rate limiting step on the system side was oftentimes, you know, okay, you know, Kramer when he's like, "why don't you just tell me what movie you want to see", like the movie phone episode from Seinfeld? I think we're at that point where people didn't know what to ask for. And they're like, just tell me what I should do. And they would come to us and say, what are the best practices with DEI, with trust based things that I said, well, you know, I think to some degree to like being that prescriptive as a vendor, we felt a rough, right. So I was like, Well, I don't know, why don't you guys tell me? So I love this momentum that we're seeing this sort of hub of communication across not just the funders, the grantees, and the vendors coming together to say, let's just implement these very basic things and implement what makes sense. You turn off the things you don't need. But I think that's the thing. It was almost like we're coming at it from a night and day perspective, when sometimes that blend was what we needed to be able to make sure people felt like there were certain cultures or things that we are accounting for, without being too prescriptive. And that's been I think the biggest challenge for me, is honestly just



saying, well, how do we make sure that conversations are happening, and then to your point, taking those and immediately putting them in the system is actually the easy part. So the fact that we're now getting to this juncture is so exciting, because it's something that we cannot just make happen with PDC, or whatever sort of centralized structures there. But it's something we can make as a part of our base package where people just turn it on. And it's there, if they want it, if they don't need it, and they're not ready, they put it away.

Chantal: Exactly, I think that there is - when you start to operationalize some of these values, you realize there's an extraordinary opportunity. When you stay at the philosophical level of discussion, I think you missed some real opportunity. And another area where we're seeing that is around equity. So for several years now, TAG has had a Diversity Equity and Inclusion working group. We've had many conversations with our members. And I can tell you what our members are asking for, they want to start operationalizing equity, they want to move from awareness and conversation, to actually creating policies, measuring, holding themselves accountable. And so we, TAG actually launched a pilot for an "equity essentials for philanthropy tech" program last year. And we had 60 seats in the pilot, and we had 69 people who participated ultimately, so we were oversold on the pilot program. But one of the reasons why there's such an immense need for this, we're now in a place where we want to see equity training specific to your unique role within an organization. So as a tech staff member, how can you operationalize equity? If you're in tech, that looks like, for example, ensuring your org and your vendors meet accessibility guidelines, like Web Content Accessibility Guidelines. If you don't, you are not enabling a reasonably large swath of people with any sort of visual impairment from using your systems, for filling out your grant applications. Yet, that kind of inequity is totally invisible to people without a tech background. They don't even know that that's a thing. And so we're really seeing a call for this kind of equity work specific to roles so everyone can bring, do their part, and lift up equity in their organizations.

Kerrin: So over the years, Chantal, you and I have spent an unbelievable amount of time talking through the role of data, the role of these standards, the role of these initiatives. How we can start to move them into the systems to some degree is going to be around this idea of common data, the race to Data Commons is oftentimes what I've heard you refer to it as and it's about mobilizing the collective to be able to pull together and support some of these actions that were calling out that you just spoke through. And I guess that, I think the next trend that you spoke to, is really around the idea of data coming from the fringe to the forefront. Do you mind kind of elaborating a bit about the role of that, that common denominator and pulling together essentially a way for us to path forward some of these conversations and moving to implementation, for example.

Chantal: I'd love to. Data, the word data, was on the tip of everyone's tongues at the TAG conference. If there was a session on data, it was a standing room only session at the TAG conference. At the same time, there's a great deal of buzz right now around data. If somebody has their, their buzzword watcher - democratizing data - is a buzzword right now. TAG did a poll with our members yesterday on trending buzzwords in philanthropy and philanthropy tech and the number one choice was "democratizing data." The space for a data commons, the space for being a data intermediary in the social sector, is becoming increasingly crowded. You have Candid, Giving Tuesday starting a Data Commons, Charity Navigator has been in this space, the Philanthropic Data Commons called in shorthand, the PDC. Many of these folks are claiming to democratize data. What does it really look like? I mean, democratizing data, to me, means sustained funding for open data infrastructure. It means investing in a shared infrastructure, perhaps like HMIS. It's a homelessness management information system created by HUD, is



the philanthropic sector willing to create a shared infrastructure for data and funded as a public good...

Kerrin: And government? Right. I mean, that's also the part that's challenging, too. So yeah.

Chantal: And government. So I don't know where we're going to go here. But this is a trend we're watching.

Tim: I want to jump in because we're actually part of the Giving Tuesday Data Commons. And so what I know it's starting to seem like which streaming service you need to log into to watch your favorite show, right? Like, same kind of issue in some ways, I thought we were moving away from cable to make this easier, right? Same thing with the data, it's like, I thought all of this is supposed to make it more clear. And the big struggle that, from our perspective, on the Giving Tuesday side, we negotiated to move the Fundraising Effectiveness Project data into the Giving Tuesday Data Commons, because we saw the scalable potential there. And the things where it really clicks in for people are what they're definitely infrastructural. If the API's or the data flow is terrible, like, I can't look up anything, and it's inaccessible. So you have to have it where it's speedy, well funded, that's going to take money to do properly. Generally, where I'm wondering things, though, is if you need people to do something, what is the incentive for them to do it? Like a lot of times when we work with individual nonprofits, for something like Candid, for instance, the value proposition that they've put forward is stuff that's not very clear. Right? And so I think a lot of individual nonprofits are still struggling with where do I enter this information. I have to do this so many different times. And why do you keep asking me for the same thing, because you have to fill out a payment application. And there's, you know, your customer information with Social Security things, and then the EIN and all this. And that's just to get a donation online for somebody. That's not even like a multifaceted grant. So that's just a little perspective from our end, that it's a lot of work to do this, but we have to do it. We have to do it.

Tim: And I think that grounds to the fifth trend that Chantal, you're seeing is what is that experience? What is a good experience for grantees? How do we make sure that again, I agree, there's a little bit of an over proliferation right now, Data Commons, and they're all in service to the grantee. So how do you go back and ground there first? So tell us a little bit about what you're seeing there.

Chantal: You know, Tim said something that's really important, I think to linger on. And that is, we're asking nonprofits to put their data in a repository, what is the value for them? And this is a very important aspect of the trend that I see around moving toward customer experience. Do you know what customer experience is? It means identifying the value, the pain points and the gain points, for whomever is your customer. Whether that's a student at a university, a patient at a healthcare facility, but understanding what they get out of that series of transactions and making it as easy as possible for them to solve their problems and get what it is they came for. Philanthropy is just beginning to embrace this mindset and view grantees, nonprofit partners, as customers. I think this is a really important shift. Because what's the goal of philanthropy at the end of the day? It's improved societies, right? And who does that work? It's not the foundations. It's the nonprofits.

Tim: We commissioned some research by Ellie Kay, to look at the data sources that nonprofits were relying on. And it was a meaty report internally. But one of the biggest things that came out of it was - just for fundraising, individual giving, not even the grants management, the average nonprofit, is using three to five different data sources. Just for individual giving. These aren't



programs. It's iffy, if that includes volunteer management. And, a lot of people, especially the smaller organizations, manage their grants out of an Excel spreadsheet. And so there's just so many friction points. And what happens is that an individual giving at least, and I know this is getting extrapolated when it comes to the funder side, the experience side, is that all it takes is one bad data field and you lose a donor forever. The new donor retention rate is 18%. 18%. Oh, yes, that's that Data Commons Chantal, that's a Giving Tuesday Data Commons, at the very least. So it's not Neon data, it's multiple providers. And that's fun. It's a terrifying statistic, but it's an accurate one. And the overall retention rate for individual givers is 44%. And it's being propped up by increasingly large gifts. And so, where the concern overall is, that one data field, you could send out your email through Constant Contact, or MailChimp, who, by the way, MailChimp, just basically, as close to getting rid of their free plan, as possible, announced that pricing increase this week. So more and more examples of the for profit industry, when the going gets tough, they just get out of here. And so it just takes one field that's like, I got divorced from that person three years ago, why are you calling me that name. And they'll just stop responding. But it's even bigger, the stakes are even bigger when it comes to due dates for grants and things that if you miss one deadline, you lose a lot of money. So I just wanted to share that insight. But Chantal like, where are you seeing things shift toward the positive here? Because we're not doom and gloom here by any means.

Chantal: Question is, who understands and cares about the end-to-end experience of a nonprofit, in fundraising and applying for a grant and completing the grant and doing their work and reporting on the grant? Who's tracking that end-to-end experience? And I think that's the challenge question that I'm offering to philanthropy: if you actually care about those outcomes, you should be caring about that end-to-end experience. And here's the good news. A year ago, this month, a year ago, I taught a workshop at the Florida Philanthropic Network Conference. Thank you, Ashley Dietz for inviting me. I taught a workshop on journey mapping, journey mapping the nonprofit experience with philanthropy. It was packed, people were so engaged, their eyes were wide open on what it looks like to map, to journey map, an end-to-end experience and identify those pain points and those gain points. It was a fantastic workshop. And since that time, I was asked to repeat it probably three or four times last year at various regional grantmakers. So I think there's a real bright spot. And it's coming from regional grantmakers who want to understand how to serve nonprofits in their region better by understanding what their reality looks like. So I have a great deal of hope in regional foundations, regional association of grantmakers, and also in community foundations.

Tim: I agree and that you queued up our last trend beautifully! I want to see that presentation because I literally am wrapping up a workshop around what we call generosity experiences, which is that kind of understanding of end to end marketing, to fundraising, to reporting back and financial activity. So I would love to see what you're working on. And I think you're right, because a lot of our influence on that idea and that framework was driven by learning what's happening with Community Foundations. We do a lot of work with giving days, for instance, community giving days with foundations. And that's been something that has evolved, especially since the pandemic. So but that's the only real kind of more connected experience that I've had with them is around that one programmatic event. What is going on with Community Foundations, beyond that type of stuff? Because I know there's a lot of activity there.

Chantal: Oh, listen, I am absolutely ensorcelled by Community Foundations after looking at the, well looking at their response in the pandemic, their responsiveness to community, but also at the data that we saw from the state of philanthropy tech survey. So flying over a couple of trends, we saw Community Foundations providing funding for tech and technical assistance, so



tech and TA, to a greater extent than any other type of foundation. So Community Foundations were more likely to provide their grantees and nonprofit partners, tools, like Slack, or Zoom licenses, and technical assistance, skill building on security, for example. They were more likely to do this in any other type of foundation. Why is that? You know, I, they were also more likely to do something else. So I think the theory is the same for both of them, they were more likely to also provide DEI training, equity training, for their tech staff. Large community foundations are more likely to train their tech staff on DEI than large private foundations. Something happens with large privates, they stopped doing some of that good stuff. Large community foundations do even more of that good stuff. Kerrin, I don't know why. But I have some theories. And when I speak with TAG members, here's what they say. Maybe proximity to community,

Kerrin: That regional aspect you were talking about.

Tim: That is the very first thing I thought of. There's strong evidence in philanthropic psychology around regionalism, and even the priorities change as somebody lives in a community longer. On individual giving, there's been some academic studies that have shown that even the things that people support change, the longer that they live somewhere.

Chantal: Well it could be. It's an obvious trend. And the other one, though, that's important, is to think about Community Foundations revenue model. They raise funds from donors. So ultimately, unlike foundations with an endowment, that solely rely on their endowment, community foundations are accountable to their donors. Accountability makes a huge difference in responsiveness to community. So I suspect it's some combination of both proximity and accountability. But here's the deal. The phil tech survey also showed Community Foundations have less tech staff and less tech funding than their private foundation peers. In other words, they're doing more with less. Which gives me such hope, right? When you care, you can do more with less. And that's to me, the real narrative around Community Foundations. They have found a way to respond to what their nonprofits need, in spite of having a little bit less than their private foundation peers with which to do it.

Kerrin: That's so interesting, because if you think about that same equation, in many ways, government should be the same way. Because you know, obviously, its constituents are the taxpayers and all that. So it's very interesting. I wonder how that kind of plays out not for today's conversation, we do not have time. And I know Tim has swung theories of that. But it is interesting, like you said, where's the money, the power? And to be honest, like they're investing in getting things through to the end user, which is the grantee not necessarily being academic, where oftentimes, I think, you know, foundations can kind of stay in that theory of change from sometimes a little too long and forget to sort of administer and move forward. So I imagine COVID, and a million other things to probably help people to realize that mobilize quickly, efficiently, concisely and I think that's something that it would be very interesting to kind of look back at as we get a year or two away from a lot of that hubbub.

Chantal: I have to toss in one government data point. Government funders, government grant makers in our survey, were even more likely than community foundations to be providing funding for tech and tools.

Kerrin: There you go. I know nothing but just anecdotal theory that that they would have to so that's wonderful to hear that actually is what showed up in your survey. Wonderful.



Tim: I think a lot of people forget that innovations in giving vehicles have been, in many ways, come from the Community Foundation space. The donor advised fund exists because of the Community Foundations. The United Way came out of the original idea of the community chest like the monopoly thing. And that came out of a bunch of people not wanting to get appeals in the 1900s from a bunch of different nonprofits. We've been having these things for over a century in these types of conversations, but what it all ultimately comes down to, if we kind of thread through everything, is that the time to act is now and I think that people know that they can do a lot with less, but that they're getting fed up with that situation. And I think that where we're moving toward is, it's not about business efficiencies, it is about impact efficiencies, in many ways.

Kerrin: Chantal, what is it that we haven't covered that you want to dive into or anything you want to speak to at a higher level? Before we kind of wrap up into what we call our rapid fire? You know, sort of quick questions that we throw at you just to add some fun and spice to the day. Is there something you wish we had asked you that we didn't?

Chantal: You know, no not for this session, but I just want to give a shout out to all of the tech staff at foundations who are advocating for this operational funding. The tech staff at foundations are allies to the nonprofits that need this kind of funding. They're internal change agents that keep in mind the operational needs for nonprofits. So I just want to thank all those folks who are pushing from within.