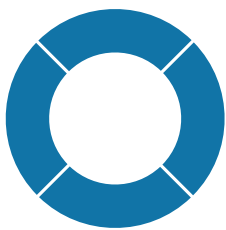




Technology Affinity Group
PROMOTING TECHNOLOGY IN PHILANTHROPY



Impact Infrastructure:

**PRAGMATIC OPPORTUNITIES TO EQUIP
YOUR ORGANIZATION FOR IMPACT**

A Landscape Analysis by the Technology Affinity Group



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Introduction

This landscape analysis is an attempt to cut through the clutter around impact.

Too often, IT leaders are stymied by discussions on “impact,” as such discourse can be too wide-ranging for translation into operational strategy. Other times, technology leaders will charge nobly forward in stewarding impact data standards only to find such initiatives wither from lack of adoption. This whitepaper attempts to find a middle-ground where leaders can assess their current state against the backdrop of existing efforts in the sector and chart a path forward.

What is this middle ground? Through hours of research with thought leaders in technology, programs, and evaluation throughout the United States, TAG has prepared a **lifecycle of impact** that includes elements sometimes overlooked by operations leadership. The middle ground is an acknowledgement that the work of impact is bigger than grants management or data analysis. In fact, it is a cycle of processes that span planning, implementation, evaluation, and collaboration.

Using this lifecycle (presented fully on page 5), the TAG research team then assessed the current state of technologies, initiatives, and resources within each phase of the lifecycle. Through this **landscape analysis**, TAG has found that much effort has already been expended in the Implementation phase (shown in green) characterized by grants management tools, technologies, and systems. As operations leaders, our charge historically has been to innovate and optimize primarily within this Implementation phase.

Lastly, through analysis of the current state of support for the full impact lifecycle, this whitepaper presents a series of recommendations framed as **opportunities**. These opportunities range from the pragmatic adoption of existing data standards to capacity building internally and with grantees (i.e., shifting organizational culture toward data literacy) as well as opportunities for sector-wide leadership in developing new tools and ways of collaborating.

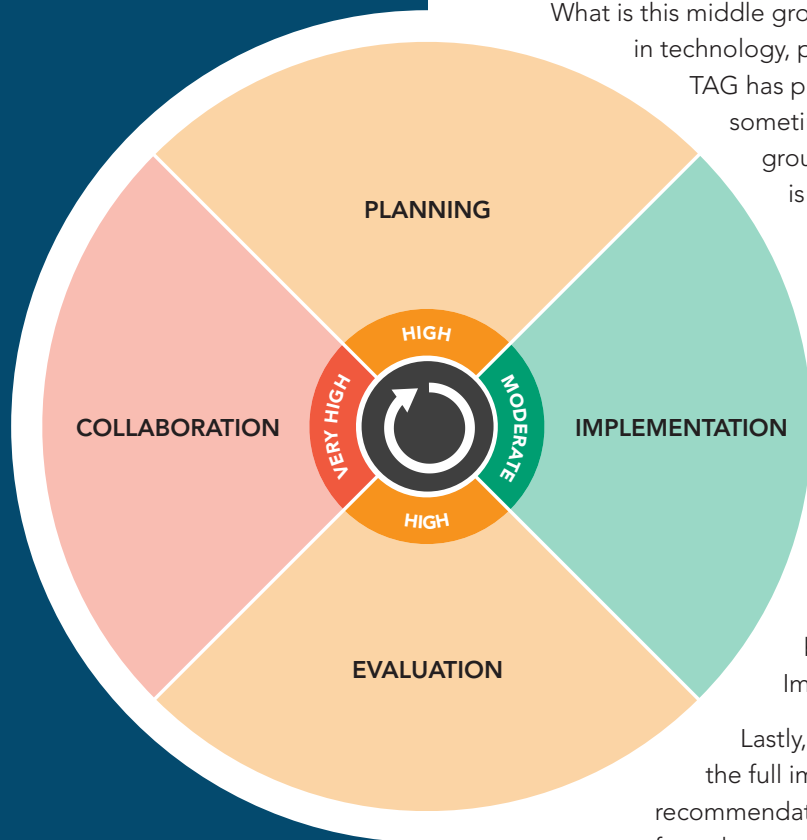


Figure 1: The Impact Lifecycle. The colors illustrate the intensity of opportunity (Green = Low, Red = Very High).

Depending on your organization's ability and interest, for example, you may choose to explore capacity building initiatives designed to build a culture of data literacy within your foundation before proceeding to create or fund the creation of new standards or tools.

For a full list and deeper description of opportunities presented for a range of organizational maturity levels, see page 14.

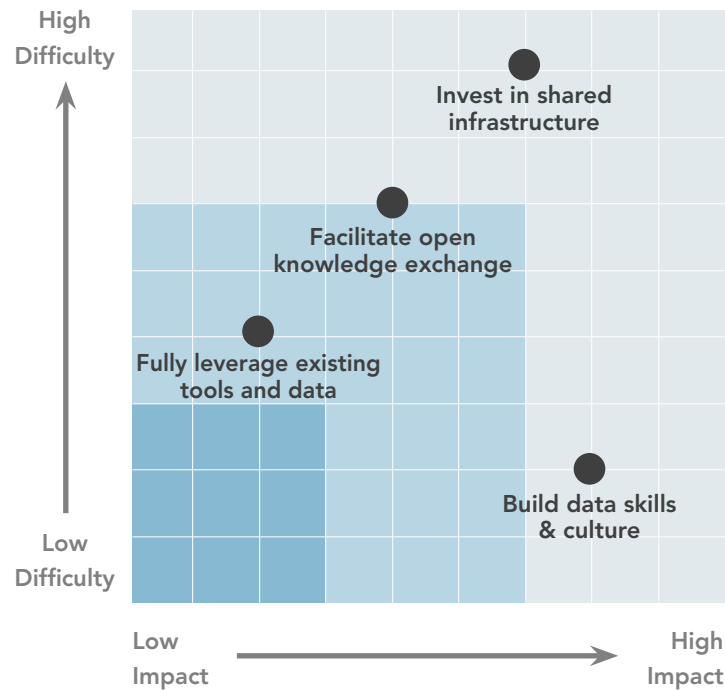


Figure 2: High-level opportunities identified by this research presented by level of difficulty and likely impact.

A CRUCIAL PERIOD IN PHILANTHROPY

Now more than ever, the effectiveness of philanthropy requires the data and tools to accurately assess need, predict outcomes, collaborate with grantee partners, measure and communicate effectiveness, and understand the outcomes of multi-funder efforts. And much of this information is being requested in real-time, or at least with greater frequency than an annual report.

For you as an IT leader, this analysis is intended to increase your influence and the impact of your work. Whether you are just getting started, maturing your approach, or looking to build sector-wide initiatives, the Opportunities section on page 14 offers a variety of suggestions to consider in your strategic planning.

Informed by this research, TAG aims to mobilize the sector not by creating new tools or competing with efforts underway by our members, but rather by acting as a connector, promoter, and convener in order to amplify work already under way while also highlighting potential gaps ripe for innovation. Once identified, TAG may, in collaboration with members and partner organizations, steward future innovation initiatives where there is a genuine need.

BEYOND GRANTS MANAGEMENT SYSTEMS: WHAT IS THE FULL LIFECYCLE OF IMPACT?

Until now, many IT departments in philanthropy have been focused on the **operational elements** of impact and evaluation. Operational elements might include streamlining the grants application process, moving to a fully paperless system, or delivering dashboards of programmatic allocation. In fact, a common question from foundation IT directors is, “Which grants management system does the best job at evaluating impact?”

In the past, many efforts—including TAG’s Simplify project—have taken a narrower view of gaps and opportunities, missing key elements of work needed to integrate the processes associated with assessing, funding, and evaluating impact. As IT leaders, admittedly, we have sometimes left our colleagues without systems, data, or tools due to this narrow lens. With the rise of interdisciplinary grantmaking teams and an increasing dependence on technology, the current state of philanthropy requires a more integrated, holistic assessment. This time, we have used a wider lens.

Through this lens, important gaps have been identified and presented as opportunities, color-coded to reflect the level of opportunity we see for improvement.

THE OPPORTUNITY INDEX

For each area of the lifecycle, we’ve assigned an Opportunity Index ranging from green (low) to red (very high), as shown in the illustration. This index represents the potential benefit to the sector when changes are made as described in the Key Opportunity Areas (see page 14). While we see room for improvement in all lifecycle areas, some have more potential for advancement than others.

- **Very High Opportunity (Red):** We see the largest potential in the area of Sector Collaboration, because historically, organizations within the sector have largely operated individually rather than as a group.

- **Moderate Opportunity (Green):** We see the least opportunity in Program Implementation based on the significant effort already invested in systems, processes, and capacity in this phase.

Deeper analysis of each phase and an assessment of current state as well as opportunity level is presented on the following pages.

Figure 3: The Impact Lifecycle. The colors illustrate the intensity of opportunity (Green = Low, Red = Very High).





Landscape Analysis of the Impact Lifecycle

In order to determine gaps and areas of opportunity across the broad spectrum of work within the impact lifecycle, the TAG research team has conducted an assessment of technologies, initiatives, and resources currently available to support each phase.

In a series of interviews with thought leaders throughout the United States in technology, programs, and evaluation, we asked the following questions:

1. What are the phases of work associated with impact planning and evaluation?
2. What tools, systems, and initiatives are currently in use for each phase of impact work in your organization?
3. Where is there significant opportunity to strengthen and integrate?

Their answers shed light on the current level of support and innovation within each practical phase of the impact lifecycle, and provide the basis for the landscape analysis presented below.

THE PLANNING PHASE OF THE IMPACT LIFECYCLE

Overview

Program planning is the analysis and strategy work that informs and guides a foundation's grantmaking efforts.

Typically, this phase encompasses the following:

- **Landscape Analysis:** Before strategy is set and investments made, most foundations devote research and analysis to understanding the needs of the beneficiary communities as well as the sector's current investment levels. Currently, there are data sources and tools to help funders assess need, but our research indicates that market-driven solutions are not currently providing a sufficient level of support.
- **Strategy:** Developing a program strategy typically involves the creation and usage of conceptual models to guide a grantmaker's funding decisions. For example, program strategists might create a Theory of Change and Logic Models to describe the specific resource inputs, activities, outputs, and desired outcomes of the program based on the landscape assessment conducted earlier. While some software tools exist to facilitate this approach, they are not in wide use, and models often cannot be created collaboratively across teams or funders. Furthermore, such tools are standalone and not integrated with work in other lifecycle phases.



Figure 4: Opportunity in the planning phase is high due to under-utilized resources and the potential to better integrate this work with evaluation.

“Taxonomy is a vital building block in creating the kind of 21st century information system that befits philanthropy... Having that kind of system will unleash the ability of foundations to work far more efficiently with each other and with other sectors to achieve the kind of scale that can drive real change in the world.”

— Brad Smith, President, Foundation Center

- **Taxonomy:** Many grantmakers make use of a taxonomy to tag or “code” their portfolio of investments with terms that relate to specific target populations or support strategies. While sector-standard options do exist, such as the Foundation Center’s Philanthropy Classification System and the Sustainable Development Goals, these are not widely adopted and many foundations choose to use a proprietary taxonomy. Competition between taxonomies creates confusion and makes it difficult for the sector to do apples-to-apples comparisons of evaluation efforts.

Landscape Analysis

Opportunity Index: High. Grantmakers put great effort into planning, but many are not taking full advantage of the resources available to support this work and are not structuring their efforts in a way that facilitates and more easily integrates with evaluation and collaboration.

PLANNING	
<i>The available resources are not being fully utilized.</i>	
STRATEGY	
<ul style="list-style-type: none"> ▲ WKKF Logic Model Development Guides ● Software (e.g. Theory of Change Online, Dylomo) 	
TAXONOMY	
<ul style="list-style-type: none"> ▲ Foundation Center Philanthropy Classification System ▲ UN SDGs (Sustainable Development Goals) ▲ GeoTree 	
LANDSCAPE ANALYSIS	
<ul style="list-style-type: none"> ▲ Foundation Center Maps/Data ▲ GuideStar Data ▲ Community Commons Community Health Needs Assessment ▲ Cultural Data Project ▲ Human Rights Funders Network Map Tool 	
OPPORTUNITY INDEX <ul style="list-style-type: none"> ● Moderate ● High ● Very High 	COVERAGE <ul style="list-style-type: none"> ● Technologies ■ Initiatives ▲ Resources

THE IMPLEMENTATION PHASE OF THE IMPACT LIFECYCLE

Overview

Program implementation refers to the logistics of making and administering grants. Typically, this phase encompasses the following:

- **Grants Management:** The logistics of grantmaking is the primary focus of most IT and grants management departments, and is supported through the use of a Grants Management (GM) System and related tools. This phase includes activities such as researching funding opportunities, soliciting proposals, accepting and reviewing grant applications, performing due diligence, processing payments, and collecting grantee reports. Currently, the sector is well-supported by a rich variety of GM and other systems from several commercial vendors and Philanthropy Serving Organizations. For years, the philanthropic sector has focused on optimizing business processes and technologies relating to grants management.
- **Relationship Management:** The work of grantmaking involves relationship management at numerous levels. For example, grantmaking might include building local or issue-based networks, recruiting fellows, working with researchers, and facilitating interactions between funders, grantees, and beneficiaries. Traditionally, these interactions have occurred offline or in shadow IT systems such as single-department CRM systems. This fractured approach to relationship management means that grantees often have to use several different systems to interact with different funders, and very few efforts exist to consolidate the experience for grantees across multiple funders. Similarly, many organizations lack a single system for managing all relationships related to field-building at the macro and micro levels.



Figure 5: Opportunity in the Implementation phase is moderate due to existing support by technology systems from commercial vendors and Philanthropy Serving Organizations.

“By minimizing the amount of time, effort, and money that nonprofits spend getting and administering grants, funders increase the amount of time, effort, and money devoted to mission-based activities for both grantmakers and grantseekers.”

— PEAK Grantmaking

Landscape Analysis

Opportunity Index: Moderate. This work is well-supported by technology systems from commercial vendors and Philanthropy Serving Organizations; however, organizational silos between such departments as IT, Communications, and Programs result in disconnected systems for communicating and managing relationships with all people touched by an organization.

IMPLEMENTATION	
<i>The ecosystem is relatively mature in this area, but there is room for better integration.</i>	
GRANTS MANAGEMENT	
<ul style="list-style-type: none"> ■ PEAK Grantmaking’s Project Streamline ● Commercial Grants Management Systems ▲ GuideStar Data ▲ Center for Effective Philanthropy ▲ Grantmakers for Effective Organizations 	
RELATIONSHIP MANAGEMENT	
<ul style="list-style-type: none"> ● Social Networks (e.g. Facebook, LinkedIn) ● Private Online Communities (e.g. Higher Logic, Boonex) ● CRM Systems (e.g. Salesforce) 	
OPPORTUNITY INDEX <ul style="list-style-type: none"> ● Moderate ● High ● Very High 	COVERAGE <ul style="list-style-type: none"> ● Technologies ■ Initiatives ▲ Resources

THE EVALUATION PHASE OF THE IMPACT LIFECYCLE

Overview

Evaluation includes the strategic and hands-on work related to collecting and using data to understand the impact of our programs. Typically, this phase encompasses the following:

- **Evaluation Framework:** An evaluation framework is often used to analyze data and turn it into insight about the success of a program. When an organization wants to better understand the impact of its work (whether it's as simple as a few indicators related to food access, or as complex as clinical trial protocols in medicine), an evaluation framework can provide a systematic process for doing so. Several existing technology tools are available to help in designing and implementing a framework, but often they focus on individual pieces of the framework rather than the integrated whole. The few systems that attempt to offer a comprehensive approach are generally not tightly integrated with other systems used by grantmakers.
- **Data Acquisition:** Data collection and preparation are a fundamental requirement for the work of program evaluation. And yet, currently, many foundations fund duplicative efforts for data collection when such endeavors could be coordinated across funders. Previously, the most common approach to measurement was to collect small amounts of statistically meaningful data that could be used to infer insights about a larger group. The increased ability to collect more, better, and new types of data has changed the game, making large-scale direct observation more practical. Using existing technologies to build shared infrastructure targeted at the specific needs of the sector would be of great value. This could include specialized survey-style systems for building assessment tools, centralized repositories, and databases for storing data from multiple sources. Such shared efforts could also foster quicker adoption of cutting-edge technologies that might be too challenging for individual organizations to implement.
- **Data Analysis & Reporting:** Built upon data acquired, whether primary or secondary, the results of program evaluation are predicated upon analysis of qualitative and quantitative data based upon the evaluation framework created during the Planning phase. Currently, a wide variety of analysis, visualization, and reporting tools are available, but many organizations lack staff fluent in data analysis. Additionally, the outcomes of analysis are rarely shared in reusable formats or databases capable of self-serve analysis by decision-makers. In this phase, we recommend making data literacy a key priority for foundations and their partners. Once skills are stronger, there is additional opportunity to mature your organization with self-serve business intelligence frameworks.



Figure 6: Opportunity in the Evaluation phase is high due to fast-moving advances and the lack of shared platforms built for and supported by philanthropy.

“We believe that informed decision-making leads to more effective stewardship of resources and better results. It is an ongoing process of collecting information and using that information to deploy resources most effectively.”

— MacArthur Foundation

Landscape Analysis

Opportunity Index: High. The technologies to enable much of this work already exist, but the sector needs to become stronger in their utilization. By improving data literacy within our organizations, we can create a culture more likely to adopt and benefit from these tools. By building shared infrastructure, we can make these technologies more available, increase adoption, and improve their usefulness. We also need to embrace cutting-edge technologies more quickly to benefit from fast-moving advances.

EVALUATION <i>Many pieces are in place, but we need much broader adoption and more infrastructure.</i>	
EVALUATION FRAMEWORK <ul style="list-style-type: none"> ● Software Platforms (e.g. Sopact) ▲ SDG Indicators ▲ Impact Genome ▲ BetterEvaluation.org ▲ Innovation Network ▲ Center for Evaluation Innovation 	
DATA ANALYSIS <ul style="list-style-type: none"> ● Analytics Tool (e.g. Tableau, PowerBI) ▲ Capacity Building (e.g. Datakind, Data Scientists for Social Good) 	
DATA ACQUISITION <ul style="list-style-type: none"> ▲ American Community Survey ▲ Open Government Data (e.g. data.gov) ▲ Open Data Repositories (e.g. datahub.io) ▲ Foundation Center Data ▲ WINGS Global Philanthropy Data Charter ■ Data Trusts ● Survey Tools (e.g. SurveyMonkey) ● Assessment Tools (e.g. Algorhythm.io) ● Data Catalog Software (e.g. Waterline Data) 	
OPPORTUNITY INDEX <ul style="list-style-type: none"> ● Moderate ● High ● Very High 	COVERAGE <ul style="list-style-type: none"> ● Technologies ■ Initiatives ▲ Resources

THE COLLABORATION PHASE OF THE IMPACT LIFECYCLE

Overview

Sector collaboration offers a vision of scaling investments by sharing data, knowledge and networks, building infrastructure, and coordinating efforts across the social and public sectors. Typically, this phase encompasses the following:

- **Publishing Knowledge:** Currently, the results of program evaluation are typically privately held. Grantmakers can increase the value of evaluation efforts by sharing knowledge with the rest of the sector. At this time, some shared repositories exist (such as Issue Lab) but are less adopted than is ideal.
- **Shared Infrastructure:** Much of the technology infrastructure to support evaluation is deployed and used by individual organizations. Large grantmakers often have access to robust solutions, but the majority of the sector does not. Some shared platforms exist, but many of these are not broadly adopted. Shared tools would enable a much larger number of organizations to do comprehensive evaluation, and would also facilitate more collaborative efforts. The sector-wide grant data and analysis tools provided by the Foundation Center is a good example of a project that promotes sharing and could be of benefit to the entire sector. We need more shared systems to support planning, data acquisition and analysis, and knowledge publishing. Commercial solutions can help meet some of these needs, but won't meet all of them, so the sector needs to fund and build solutions to address the missing pieces.
- **Collective Evaluation:** The vision of realizing collective impact requires a collective form of evaluation. Currently, few tools, resources, and initiatives exist to encourage collective forms of cross-funder evaluation.



Figure 7: Opportunity in the Collaboration phase is very high due to a growing need and desire for shared data, resources, and knowledge but very little sustained investment.

Landscape Analysis

Opportunity Index: Very High. While there is a growing need and desire for shared data, resources, and knowledge, there is very little sustained investment in development, adoption, and stewardship of shared collaboration, infrastructure, and sector-wide initiatives.

COLLABORATION <i>Collaboration efforts have begun to grow, but significant investment is still needed.</i>	
PUBLISHING KNOWLEDGE <ul style="list-style-type: none"> ▲ IssueLab ■ Data Repositories (e.g. IATI, datahub.io) 	
COLLECTIVE EVALUATION <ul style="list-style-type: none"> ■ SDG Index and Dashboards ■ Funders Learning Group for Using Evidence for Change (Nerd Herd) ■ Digital Impact Toolkit ■ Sustainable Development Solutions Network ■ Impact Management Project ■ Co-Impact.io ■ Evaluation Roundtable 	
SHARED INFRASTRUCTURE <ul style="list-style-type: none"> ▲ Foundation Center & GuideStar ▲ TechSoup NGOSource ■ Global Partnership for Sustainable Development Data ● Brighthive Basket/Reframe ▲ Collaboration Platforms (e.g. Data.World) GlobalGiving 	
OPPORTUNITY INDEX <ul style="list-style-type: none"> ● Moderate ● High ● Very High 	COVERAGE <ul style="list-style-type: none"> ● Technologies ■ Initiatives ▲ Resources



Key Opportunity Areas

Based upon the analysis presented earlier in this whitepaper, TAG has identified four clusters where the sector is presented with significant opportunity to address gaps or inefficiencies in impact infrastructure. Shared as actionable commitments your organization can prioritize for today and beyond, the four opportunities are:

1. Build data skills and culture.
2. Fully leverage existing tools and data.
3. Facilitate open knowledge exchange.
4. Invest in shared infrastructure.

Getting started is easier than you might think. For each opportunity, actions are presented in three stages of maturity so that you might apply suggestions as is most fitting for your organization and current level of maturity.



Figure 8: Where are you? Consider taking advantage of opportunities that are most appropriate for your organization's current state.

Begin where you find your organization today. Evaluate suggestions within your current phase and prioritize opportunities that lie ahead. Moving toward Stage 3 will serve to advance the sector as a whole in partnership with other funders as well as nonprofit partners and grantees.

If you are just getting started or have few resources, building a culture of data literacy both internally and externally is a good place to start, not only because it boosts your own organization's ability to make an impact but also because increasing data skills in the social sector serves to strengthen grantee partners as well as the sector as a whole.

BUILD DATA SKILLS & CULTURE

Below are actions you can take to build data literacy in your organization and beyond.

Getting Started

1. Make data literacy a priority for your organization.
 - Demonstrate the use of data in decision-making through the use of organizational dashboards and reports.
 - Provide professional development opportunities for staff. There are many free or affordable online/self-paced resources from such sites as YouTube, Udemy, and Lynda to help learn the basics of working with databases, doing analysis, and creating visualizations. Additionally, universities like the University of Chicago offer online Data Science certificates for professionals: <https://grahamschool.uchicago.edu/academic-programs/professional-development/data-analytics>
 - Add aspects of data literacy to job descriptions, such as working with databases and analyzing or visualizing data.
2. Prioritize data coding in your organization.
 - At a basic level, even if your organization isn't ready to implement a comprehensive coding system, you can get started by creating **detailed grant descriptions** that include the same types of information that make up a taxonomy: subject areas, populations, organization types, transaction types, support strategies, geographic targets, as well as any additional information your organization finds important. This will allow third parties (like the Foundation Center) and machine-learning tools to help code your grant data, and will also allow you to more easily recode your data if you change your taxonomy in the future.
 - Begin implementing some form of **taxonomy**, even if it is custom, and devote time and training to ensure your organization is able to accurately and consistently code your full grant portfolio. The 17 goals of the UNs Sustainable development Goals make up a good starting point, as do the top levels of the Foundation Center's Philanthropy Classification System.
 - **Geo-code** your organization's grant data. Without this, your grants appear as though the geographic focus is that of the location of the grantee, which is often incorrect.
 - Consider enabling users to enter free-form keywords or "folksonomy" in addition to taxonomy, which helps promote buy-in and participation in coding efforts, augments formal coding, and further supports external coding efforts.

Maturing Your Practice

1. Deepen data literacy.
 - Progress a culture of data-literacy by creating cross-functional project teams tasked with data analysis and reporting on topics of value to your organization. Ensure staff at every level feel included and can understand the basic concepts of working with data.
 - Implement the infrastructure needed to collect, analyze, and share data. Give your staff access to this infrastructure as well as time and learning resources to practice working with it. For example, consider equipping program teams with systems and tools that use the Foundation Center’s Maps, Stats, APIs, and custom data sets to conduct the landscape analysis needed during the Planning phase of the Impact Lifecycle (See page 6).
 - Deepen your support of grantee data literacy by providing operating funds to build sustainable skills and systems.
2. Commit to collecting outcomes data with your grantees, even in a lightweight fashion:
 - Begin by adding data collection and sharing requirements to your grant agreements wherever appropriate. DigitalImpact.io has some resources to help get started, including a Guide to Proposal Development, Data Maturity Model, and a Funder-Required Data Management Plan template.
 - Start by using simple web-based tools to support data collection (such as SurveyMonkey, SurveyGizmo or FrontlineSMS).
 - Create policies around the collection and use of data to help ensure data privacy and ownership issues are address. Resources like Digitalimpact.io can help with this.
 - Provide funding support and capacity building for data collection as part of the grant.
3. Make data collection more purposeful to you, your grantees, and the sector.
 - Engage with your beneficiary communities to include their input around the goals of data collection and what and how data is collected and used.
 - Send your grant data to the Foundation Center (www.foundationcenter.org) via your GMS, using their spreadsheet template, or through their APIs.
 - Share any non-private data collected through open data repositories (like datahub.io).
 - Coordinate work across grantees to help identify possible overlap in data collection efforts or needs.

4. Evolve and future-proof data coding.
 - Prioritize and chart a migration plan for your organization to adopt a shared taxonomy such as the Foundation Center's Philanthropy Classification System (taxonomy.foundationcenter.org), or the UN's Sustainable Development Goals (sustainabledevelopment.un.org), or a program-area specific taxonomy. If you need customization, you can add "nodes" to an existing taxonomy for extra detail, which still allows for shared analysis of your data.
 - Multi-code, applying codes from multiple taxonomies to your grants if possible. This give you greater control over how your data is used in combination with other data for analysis.
 - Enable more granular coding of grants. For example, include allocations (e.g. percent) or emphasis (e.g. high/medium/low) for different codes.

Advancing the Sector

1. Coordinate with other funders.
 - Develop shared programs and resources for data literacy efforts targeted toward grantmakers and nonprofits.
 - Make use of affinity groups to assess where existing data collection efforts or needs might overlap. Develop methods of collecting new types of priority data as desired (e.g., private donations, governmental grants and spending, private sector CSR contributions, volunteerism).
 - Collaborate with TAG or other funders by providing funding to make access to the Foundation Center's data and tools more widely available. This might include an effort to change the business model by funding access for the entire sector through long-term grants. Current usage is small compared to the potential usage across the sector, and the closed access to the data and subscription model of the tools prevents broad adoption.
2. Influence software and service providers.
 - Develop user-testing consortiums to provide usability data on existing software such as grants management systems and ultimately improve the user interface of systems used by staff and grantees.
 - Review the basic forms of coding suggested in "Getting Started on page 15" (e.g., geo-coding, multi-coding rich grant descriptions, etc.) and work to influence software vendors to prioritize deeper support for taxonomy coding in their tools.
 - Emphasize the need for, and consider funding, open-sourced **auto-coding tools** that will help ease the burden for your staff and the entire sector.

FULLY LEVERAGE EXISTING TOOLS AND DATA

It's true: Every grantmaker has a unique approach to assessing need as well as funding and evaluating change.

While understandable, this uniqueness sometimes undermines the social sector's ability to compare "apples to apples" and ultimately understand the outcomes of funding investments.

A key set of opportunities uncovered by this research is the strong need to a) become aware of existing tools and data resources; and b) commit to operationalizing the use of these shared resources. Ultimately, leveraging existing tools and data reduces the burden on grantee partners while also enabling grantmakers to share a common language and framework for change.

Below are actions you can take in your organization to ensure existing resources are used.

Getting Started

1. Before developing an idiosyncratic set of indicators for program evaluation, become familiar with shared indicators such as those from the UN's Sustainable Development Goals or those provided by the Impact Genome Project, or others that are standard to your program areas. Consider using these standard indicators.
2. During the application process:
 - In your application process, enable the reuse of information from sources like Guidestar's Platinum Profiles (www.guidestar.org) by making it easy for applicants to reference their profile. Encourage all applicants to create a Platinum Profile to enable data reuse.
 - If granting to an arts organization, enable grantees to reuse profiles from sites such as culturaldata.org during their grant application.
 - Consider enabling nonprofits to reuse applications from another funder instead of requiring additional time to complete your custom application.
3. During reporting:
 - Consider accepting reports sent to other organization for the same project instead of requiring a custom report.
 - Consider using a grantee's annual report as their grant report.
 - While obvious, it's worth restating: During reporting, consider asking grantees only for information that your organization will actually use to evaluate their work.

Maturing Your Practice

1. In the planning phase of your work, make use of existing tools such as Community Commons “Community Health Needs Assessment” system and contribute to its ongoing refinement.
2. If existing standardized frameworks exist for your program work, adopt them or use them in parallel to your organization’s unique approach. For example, the US Department of Education’s National Center for Education Statistics provides frameworks for assessing educational progress in several subject areas, as well as for adult literacy, which may be useful to grantmakers evaluating their education programs.
3. During the application process:
 - Consider accepting shared applications through a system such as the Common Grant Application (www.commongrantapplication.com).
 - If a custom application process is required for your organization, ensure your GMS is leveraging APIs such as G4G, or Guidestar for Grant Applications to auto-populate grant applications with information from Guidestar. Learn more at: <https://learn.guidestar.org/products/resources/guidestar-for-grant-applications>.
 - If your GMS does not support G4G, influence software providers to prioritize implementation and offer to provide user testing for their approach.
4. During the reporting process:
 - Consider implementing some of the recommendations described in PEAK Grantmakings “A Better Way: Recommendations for Better Reporting”.

Advancing the Sector

1. Beginning with funders in similar program areas such as early childhood, racial equity, financial literacy, etc., devote time and resources to cross-funder initiatives designed to define and utilize common framework elements such as:
 - Taxonomies and terms for a programmatic framework.
 - Approaches to logic models so that they can be compared.
 - Indicators and measurements to be used for the indicators including common baselines and targets, common data points to be collected in support of measurement.
 - Data collection tools.
 - Reporting frameworks on shared outcomes.

Once investments are made and outcomes assessed, how well does this knowledge inform the field-building and funding work of the future?

FACILITATE OPEN KNOWLEDGE EXCHANGE

Another key finding of this landscape analysis is that the outcomes of thoughtful evaluation are rarely shared openly with the sector. Whether a technical limitation (i.e., lack of open knowledge-sharing platforms) or a cultural limitation (i.e., hesitancy to share unpolished or less-than-flattering findings), there remains significant opportunity to build a culture of knowledge-sharing as well as the platforms for doing so in a thoughtful, useful fashion.

This report urges foundations to consider taking an “open by default” approach, publishing as much of the work-product of their efforts as possible, so that others can see and learn from their process and not just their end result.

Below are actions you can take in your organization and beyond to initiate knowledge sharing and/or invest in a culture of open collective learning.

Getting Started

1. Start by ensuring that your program framework and elements are publicly available on your website so that grant applicants and other organizations can learn from your efforts.
2. Whether collecting outcomes data or synthesizing findings into a “knowledge product” or report, consider publishing to shared repositories such as IssueLab.org, datahub.io, Grantmaker Affinity Group resource libraries, and other locations.
3. Share your evaluation frameworks and tools.
4. Publish your needs assessment data and analysis on open/shared platforms so that other organizations can benefit from that work.
5. Add good descriptions and names to your documents so that search engines can more easily find them.

Maturing Your Practice

- Share your strategy efforts, including theories of change, logic models, needs assessments, funding landscape analyses, and custom taxonomies. These resources could be shared on Issuelab.org, through the resource libraries of grantmaker associations, or in online forums for groups like PEAK Grantmaking or Council on Foundations.
- Share your frameworks and components, including indicators, baselines, measurements, assessment tools, and analysis methodologies or protocols. These resources could be shared through the same avenues as above.
- Add detailed description blocks to all of the documents you create to help ensure the content is more searchable and can be more easily categorized if needed. This might include the type and purpose of the document, subject areas, populations, geographic information, date information, or references to other documents.

- Add metadata to all the documents you create and share to help describe the contents of your documents which will also help search engines and other machine systems find and understand the contents. This might include the same type of taxonomy coding you might do for a grant and also standardized data people/organization/place data such as that described by schema.org.
- Request source datasets as part of grantee reports so that you might develop a repository of data for sharing more widely with the sector (addressing any privacy issues before publishing, of course).
- Get digital object identifiers (www.dio.org) for your documents so they can be consistently referenced if you don't publish to a location that already does so (such as IssueLab.org).

Advancing the Sector

- Create or take advantage of existing shared platforms for assessing overall grantee effectiveness as an alternative to reporting on individual grants. One example of such an effort is Mission Measurement's Impact Scorecards.
- Collaborate with other funders to design and fund the creation of shared platforms for:
 - Gathering, sharing, and analyzing needs assessment data. This might mean a large single effort or several different efforts that are program-area or geographic-area specific. This could include the building of data trusts, data collection tools or efforts, data repositories or shared databases, etc. Community Commons' "Community Health Needs Assessment" is an example of such an effort.
 - Many of the existing knowledge-sharing platforms were initiatives by groups of funders to solve shared problems. This includes the Foundation Center's Electronic Reporting program, the International Aide Transparency Initiative data repository, and TechSoup's NGO Source shared equivalency determination system. Groups of funders can take a similar approach as new shared needs are identified.

“An economy needs roads, bridges, and train stations to thrive. A community needs schools, parks, and houses of worship to ensure the flowering of human potential. And civil society needs infrastructure to ensure that nonprofits and foundations can act with integrity and impact.”

— From the May 13, 2016 letter *“Investing in Infrastructure”* to the sector from 22 Philanthropy-Serving Organizations.

INVEST IN SHARED INFRASTRUCTURE

Individual or custom solutions mean duplication of effort, and are often only available to organizations with significant resources, meaning that many mid-sized and small foundations (including family and community foundations as well as their partners) are left without infrastructure. Philanthropy-Serving Organizations help fill certain needs, but often their walled garden and pay-to-play approaches limit the utility and adoption of their systems. Market-driven solutions have successfully addressed some but not all areas.

An analysis of the impact landscape suggests that the future of social sector impact will rely on the willingness of foundations to invest in shared infrastructure.

Below are actions you can take in your organization to begin aligning with or investing in the need for shared infrastructure.

Getting Started

1. Resist the temptation to build custom tools when existing commercial or open source systems will provide the majority of the utility needed; adjust your business processes to align with standards. When in doubt, reach out to TAG for contacts at peer organizations to learn more about the long-term costs of building your own custom approach.

Maturing Your Practice

1. Utilize existing shared infrastructure platforms both to benefit directly and to support their ongoing availability to the sector. This includes GuideStar's G4G/Premier API, Foundation Center's Maps tool, NGO Source, and Data Arts.
2. Participate in the Foundation Center's Get On the Map campaign so that all the funders in your geographic region can get access to shared grant data. Learn more at: <http://foundationcenter.org/gain-knowledge/foundation-data/get-on-the-map>.

Advancing the Sector

1. Work with affinity groups such as TAG to develop shared language regarding the need for social sector infrastructure. Interested? Send an inquiry to partnerships@tagtech.org.
2. Partner and prioritize funding for the development, deployment, and support of infrastructure projects that will benefit the entire sector. For example, this research has identified the need for several endeavors including:
 - A common set of platforms for publishing your work.
 - Data collection tools targeted at the needs of the social sector.
 - Data repositories for publishing datasets.

Just as shared infrastructure in transportation and communication facilitates much of our society and economy, the philanthropic sector is realizing the need to build shared infrastructure to support its work.

- Databases to house data from multiple funders/nonprofits to support more comprehensive analysis.
 - Better discovery tools (like specialized search engines) to make it easier to find relevant knowledge and data resources.
 - Platforms for knowledge exchange and network development.
 - User-testing groups for social sector tools.
 - Shared data platforms for assessing community need and coverage of existing investment across the sector.
 - Alternative business models that better support entrepreneurs working to meet the needs of the sector. This is needed because existing investment structures (such as traditional banks and venture capital) often won't support businesses that target niche markets that are too small or have a low potential for economic return.
3. Develop tools that help the sector see the big picture for planning purposes, including gaps between community needs and foundation investments, to help the sector set priorities and allocate resources where they are most needed.



Moving Forward

The opportunities described here offer individual grantmakers and the sector as a whole a chance to shape what Philanthropy will look like in the future.

Together, with honest self-assessment and wise investment, we can build teams, approaches, and tools that increase the efficacy of our partners' work in improving society. Ultimately, our investments will better scale to be sufficient in meeting the challenges of our world.

Today, your organization can begin its journey. Based on the reflection and assessment presented in this whitepaper, your organization can begin moving forward on the opportunities presented by taking three simple steps.

1. **Internal Reflection:** Review your organization's efforts in light of the opportunities presented to understand where you are today. This should include input and participation from your entire organization, from your leadership and board down to the support staff in your programs and infrastructure departments.
2. **Mature Your Efforts:** Based on your current state, select stretch-goals from the opportunities listed and dedicate resources to acting on them. What can you do today? Take action to:
 - Build data skills and culture.
 - Fully make use of existing tools and data.
 - Facilitate open knowledge exchange.
 - Invest in shared infrastructure.
3. **Get Involved:** The path forward is a path of integration, requiring participation from grantmakers and grantees of all sizes, regions, and programmatic areas. To stay engaged, join TAG's mailing list specifically for this purpose: partnerships@tagtech.org.



Methodology

This paper includes information and ideas gathered from over 50 interviews, conversations, and additional sources, including:

- Interviews with thought leaders and subject matter experts who work within the philanthropy community at grantmakers, Philanthropy Serving Organizations, or vendors/consultancies.
- Knowledge resources (white papers, articles, surveys, websites, etc.) published by organizations within the community.
- Presentations and discussions from philanthropy-related and technology-related conferences and gatherings.
- Internal knowledge sharing within the TAG community.
- Internet-based research and exploration.

Strengths and limitations of this approach include:

- The breadth of focus and desire to learn unanticipated things led to good, high-level insights, but it means we have left many questions unanswered and threads of discussion unexplored. There are many more voices that could add meaningful contributions to this work that have not yet been heard from and included.
- There was no formal data gathering or statistical analysis done. This paper was meant to be more of a qualitative than quantitative treatment of the subject, providing value that numbers alone would not, using examples to support our findings. However, this approach may have missed relevant information that should be included in further discussions.
- This paper cannot stand as an authoritative and static guide on the topics we've addressed. We hope this effort sparks discussions that lead to greater sharing and learning, and perhaps further knowledge resources.

The research team for this work was led by Poney Carpenter with oversight by the Simplify Committee and TAG Executive Director, Chantal Forster.

Poney Carpenter, Consultant for TAG

Poney Carpenter has over 25 years working with information technology and data across several industries and types of organization. For the past several years, he has focused on supporting philanthropic organizations with their mission-related work.

Chantal Forster, Executive Director, TAG

Chantal is a veteran IT management consultant focused on leveraging technology for social welfare. Prior to leading TAG, Chantal developed community-driven technology initiatives in the philanthropic, public and social sectors with a focus on evidence-based strategy.

TAG SIMPLIFY COMMITTEE

TAG Simplify committee members include the following:

- Gavin Clabaugh, Vice President, Information Services, Mott Foundation
- John Mohr, CIO, MacArthur Foundation
- James Rutt, CIO, Dana Foundation
- Jonathan Werbell, CIO, Bloomberg Philanthropies
- Kris McDaid, Assistant Vice President, Information Technology, Robert Wood Johnson Foundation
- Ross Comstock, Vice President, Information Systems & Technology, W.K. Kellogg Foundation

ADDITIONAL CONTRIBUTORS

Andrew Means and Karen Graham and Chris Bernard from Idealware provided editorial guidance.

Andrew Means, Data & Technology Advisor

Andrew Means is a serial social entrepreneur leading organizations that use data and technology to create impact. He is co-founder of social sector data infrastructure firm BrightHive, founder of Big Elephant Studios which works with social change organizations to use data and technology, and founder of professional development organization Data Analysts for Social Good. Andrew holds a Master in Public Policy from the Harris School at the University of Chicago.

Karen Graham, Director of Capacity Building, Idealware

Karen Graham is a sought-after speaker, trainer, writer, and consultant with expertise in technology leadership and innovation, nonprofit software, and digital strategy. She holds an MBA in Nonprofit Management from the University of St. Thomas.

Chris Bernard, Managing Editor, Idealware

Chris is a career writer and journalist with two decades of experience.



Resources

Project-Specific Interviewees

- Alix Dunn, ED, The Engine Room
- Amy Sample Ward, CEO, NTEN
- Andrew Means, Big Elephant Studios, Brighthouse, Data Analysts for Social Good
- Benjamin Bellegy, ED, Worldwide Initiatives for Grantmaker Support
- Dahna Goldstein, Fellow, New America, prev. Altum, Philantech
- David Goodman, VP Ecosystem at Brighthouse, prev. Fluxx, Evaluator
- Gabi Fitz, Consultant, Think Twice, prev. Foundation Center, IssueLab
- Henry Berman, CEO, Exponent Philanthropy
- Jason Ricci, prev. CEO, Fluxx, CTO, Energy Foundation
- Jeannine Corey, Consultant, Philanthropy.io, prev. Foundation Center Director of Grants Information Systems, FJC Directory of Operations
- Kasia Stochniol, Associate Directory, Acumen Fund
- Keith Porcaro, Fellow, Harvard University
- Kevin Bolduc, VP Assessment, Center for Effective Philanthropy
- Kyle Rinne, Strategy and Learning Manager, Grantmakers for Effective Organizations
- Lisa Rau, CEO, Fionta
- Marty Schneidermann, Consultant, Information Age Associations
- Meriah E. Heredia-Griego, PhD, Research Assistant Professor, University of New Mexico
- Michael O'Brien, Executive Partner, Gartner
- Monte Rouler, President, Community Initiatives
- Peter York, Pricipal, BCT Partners, prev. Founder, Algorhythm.io, Senior Partner & CRO, TCC Group, Evaluator
- Raj Aggarwal, President, Provoc.me
- Russ Barrett, VP of Technology, Council on Foundations
- Steven Lawrence, Consultant, TCC Group, prev. Foundation Center
- Sean McDonald, CEO, Digitalpublic.io, Fellow, Stanford Digital Civil Society Lab

Consulted

- Annie Rhodes, Director of Foundation Strategy, Blackbaud
- Bill Anderson, Data & Information Architect, Development Initiatives
- Bradford Smith, President, Foundation Center

- Chantal Forster, Executive Director, Technology Affinity Group
- David Carr, Programme Manager, Open Research, Wellcome Trust
- Gavin Clabaugh, VP of Information Services, CS Mott Foundation
- George Alter, Research Professor, ICPSR @ Michigan.edu
- Hannah Kahn, Director of Grants Management, Chan Zuckerberg Initiative
- Jacob Harold, CEO, GuideStart
- Jake Porway, Executive Director, Datakind
- Jason Saul, CEO, Mission Measurement
- Jeff Spies, Center for Open Science
- John Mohr, CIO MacArthur Foundation
- Jonathan Werbell, CIO, Bloomberg Philanthropies
- Kevin Bohrer, Hewlett Foundation
- Kris McDaid, Assistant VP for IT, Robert Wood Johnson Foundation
- Leon Wilson, CIO, Cleveland Foundation
- Lucy Bernholz, Ph.D., Director, Digital Civil Society Lab at Stanford PACS
- Martin Tisne, Investment Partner, Omidyar Network
- Patrick Collins, CIO, Hewlett Foundation
- Robert Reid, CEO, JF Maddox Foundation
- Robert Kirkpatrick, UN Global Pulse
- Ross Comstock, VP of Information Systems, WK Kellogg Foundation
- Rufus Pollock, President, Open Knowledge Foundation
- Shaida Badiee, Open Data Watch
- Stephen Larrick, Sunlight Foundation
- Kimberly Howard Robinson, Ph.D., Executive Vice President, The Forum for Youth Investment
- Kara Carlisle, Vice President of Programs, McKnight Foundation
- Hannah Kahn, Director of Grants Management, Chan Zuckerberg Initiative
- Ross Comstock, Vice President, Information Technology, W.K. Kellogg Foundation

Evaluation Frameworks

- Evaluation Roundtable
- American Evaluation Association
- Center for Evaluation Innovation
- Catholic Relief Charities Evaluative Thinking
- Straight Talk on Evidence
- US Dept of Ed National Center for Education Statistics

Indicator Systems

- SDG Indicators
- Impact Genome

Other Resources

- Inside Philanthropy
- Stanford Social Innovation Review
- Philanthrophiles
- Alliance Magazine
- Chronicle of Philanthropy
- Philanthropy Roundtable

Reading List

- Open letter titled “Investing in Infrastructure”
This letter, available on the Center for Effective Philanthropy’s website demonstrates the broad shared understanding and support for much more shared infrastructure to support the sector.
http://www.effectivephilanthropy.org/wp-content/uploads/2016/05/Investing-in-Infrastructure_digital.pdf
- Introduction to Data Trusts:
<https://medium.com/@McDapper/the-civic-trust-e674f9aeab43>
- Listen for Good: Feedback from the People Served by Nonprofits and Foundations
https://d35kre7me4s5s.cloudfront.net/wp-content/uploads/2018/08/12003129/L4G_External-Memo_Revised-July2018-final.pdf
- Betterevaluation.org Website: Sharing Information to Improve Evaluation
<https://www.betterevaluation.org/>
- United Nations Sustainable Development Goals and Global Indicator Framework
This list of subject areas and associated indicators provides an excellent starting point for organizing and evaluating program work.
<https://unstats.un.org/sdgs/indicators/indicators-list/>
- Foundation Review article “Benchmarking Evaluation in Foundations: Do We Know What We Are Doing?”
This 2013 article takes an in-depth look at evaluation strategy and practices inside a group of grantmakers, offering insight into the trends within and challenges around their evaluation efforts.
<https://scholarworks.gvsu.edu/tfr/vol5/iss2/5/>
- W.K. Kellogg Foundation Logic Model Development Guide
This white paper is the definitive resources for how to develop logic models for grantmaking programs, and a clear explanation of what a logic model is and how to build one.
<https://www.wkcf.org/resource-directory/resource/2006/02/wk-kellogg-foundation-logic-model-development-guide>



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