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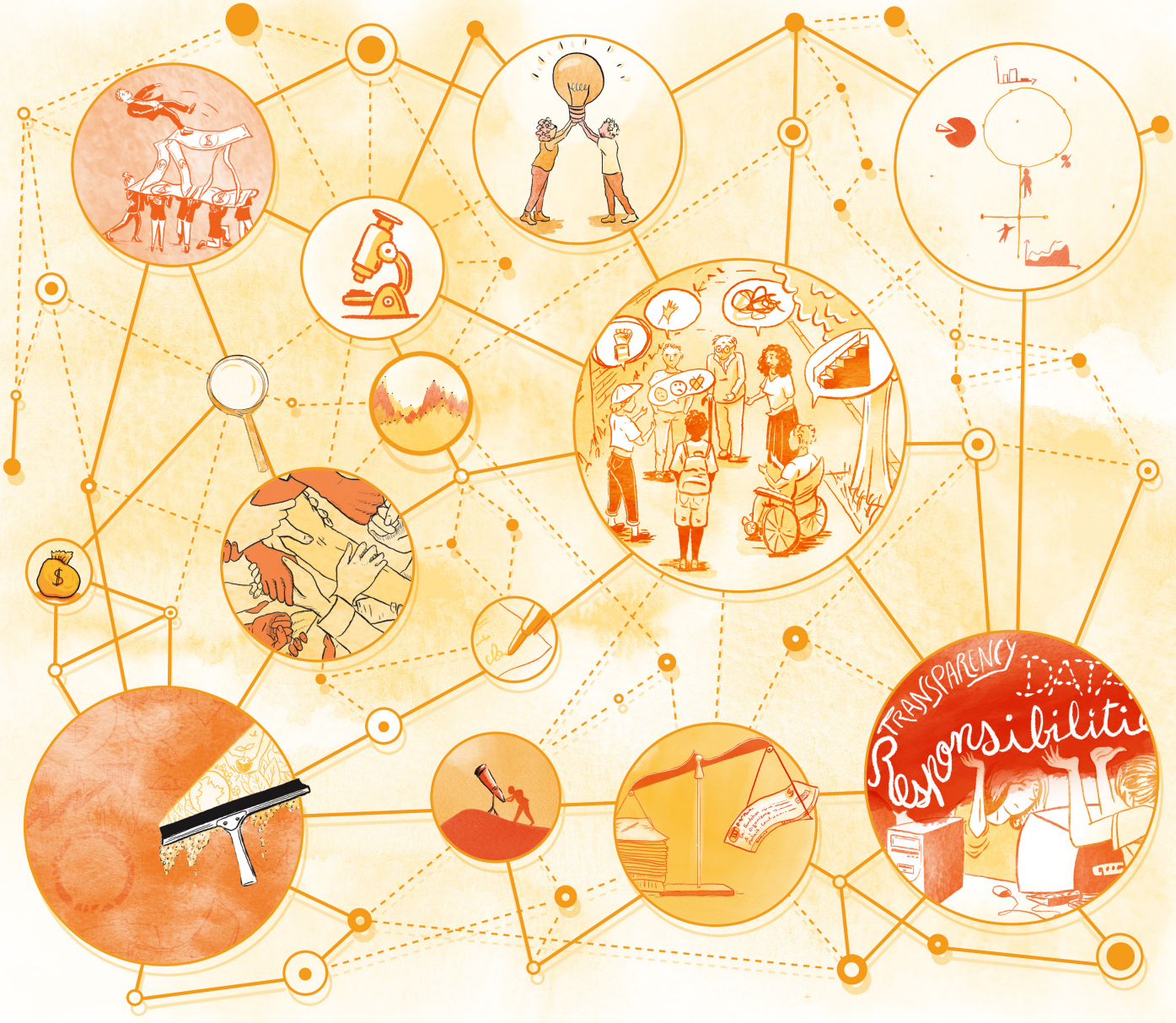

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À propos du PhiLab | About PhiLab

Le **Réseau canadien de recherche partenariale sur la philanthropie** (PhiLab), anciennement Laboratoire montréalais de recherche sur la philanthropie canadienne, a été pensé en 2014 dans le cadre de la conception de la demande de financement du projet développement de partenariat CRSH intitulé « Innovation sociale, changement sociétal et Fondations subventionnaires canadiennes ». Ce financement a été reconduit en 2018 sous le nom d'« Évaluation du rôle et des actions de fondations subventionnaires canadiennes en réponse à l'enjeu des inégalités sociales et des défis environnementaux ». Depuis ses débuts, le Réseau constitue un lieu de recherche, de partage d'information et de mobilisation des connaissances des fondations canadiennes. Des recherches conduites en partenariat permettent la coproduction de nouvelles connaissances dédiées à une diversité d'acteurs : des représentants gouvernementaux, des chercheurs universitaires, des représentants du secteur philanthropique et leurs organisations affiliées ou des partenaires.

Le Réseau regroupe des chercheurs, des décideurs et des membres de la communauté philanthropique à travers le monde afin de partager des informations, des ressources et des idées.

The **Canadian network of partnership-oriented research on philanthropy** (PhiLab), previously called the Montreal Research Laboratory on Canadian philanthropy, was thought up in 2014 as part of the conception of a funding request by the NRCC partnership development project called "Social innovation, social change, and Canadian Grantmaking Foundations". From its beginning, the Network was a place for research, information exchange and mobilization of Canadian foundations' knowledge. Research conducted in partnership allows for the co-production of new knowledge dedicated to a diversity of actors: government representatives, university researchers, representatives of the philanthropic sector and their affiliate organizations or partners.

The Network brings together researchers, decision-makers and members of the philanthropic community from around the world in order to share information, resources, and ideas.

Social Sciences and Humanities Research Council of Canada
Conseil de recherches en sciences humaines du Canada
Canada

ÉTUDES DE CAS | CASE STUDIES

De quoi parlons-nous au niveau des communautés?
What is being discussed on the community level?

Artiste | Artist: Mélika

ÉTUDES DE CAS | CASE STUDIES

The nonprofit sector equipped with out-of-date digital technology will not achieve meaningful openness & transparency without first prioritizing technical modernization

By Helen Knight, *Nonprofit Technology Consultant*

Helen Knight fights poverty with technology. Helen leads award-winning transformations through Helen Knight Nonprofit Technology Consulting Inc. where she designs and implements strategic technical change for nonprofits large and small. Helen is also an advisor to the Canadian Centre of Nonprofit Digital Resilience and Charity Navigator NYC.

So often the technical ecosystem of nonprofits reminds me of Winchester Mystery House, a 160-room house constructed one room at a time over 60 years. With no architect and no overarching plan, the house sprawls aimlessly over 4.5 hectares. Every room is out of alignment with the next, having windows that open into walls, stairs to nowhere, and skylights in the floor. The house has been uninhabited for the past 100 years. No addition of another kitchen or renovation of a bathroom will turn this house into a home. The Winchester Mystery House is a physical allegory to the technical ecosystem of many nonprofit organizations, cobbled together from donated hardware and free software. Built and supported by limited engagements of cheap and sometimes under skilled resources, they seem to be equipped to address one problem at a time, not considering the requirements of a whole home.

The unstable networks, barely functional workstations and antiquated data systems are not the enabler that technology promised. Front line staff are tasked with entering information numerous times into slow and unstable systems that alternate between demanding repetitive data entry and preventing any data entry at all. Many nonprofit staff do not benefit from the data they enter; they rarely see an insightful report or dashboard that provides new information about the important decisions they must make. With most staff focused on mission delivery, the technology they must use is just a frustrating barrier that reduces their capacity for impact. In this digitally ancient sector very few nonprofits are technically capable of internally sharing meaningful and accurate data.

There is no easy path to external data sharing; there are too many problems to remediate them by simply changing internet service providers or hiring a new vendor. The complications of working in a technical ecosystem built without an architect and without a plan are deeply rooted in the long history of every cost saving decision made without the benefit of technical expertise.

Historic Photo of the Winchester Mystery House
Source: Winchester Mystery House

Blame King Henry VIII. Since 1530, nonprofits have been held to arcane accounting standards which limit administrative expenses since 1530. Technology has changed a bit in the last five hundred years, but the tight budgets of nonprofits have not. Donors and grants are the lifeblood of a nonprofit, but I am not sure some funders understand how unreliable many nonprofits' technical foundations really are. I can more easily find funding for an innovative new system than garner an investment in the hardware and services necessary to stabilize and secure an environment. With no funding to remediate, nonprofits will continue to face significant technical barriers to their mission. With cybercrime rising globally, the cost of recovering from a ransomware attack is often far greater than the cost to stabilize and secure a nonprofit environment, but few funders are willing to address the staggering technical debt of the sector.

I believe the way to address the technical challenges nonprofits face is to start inviting more technical expertise to the nonprofit decision-making table by:

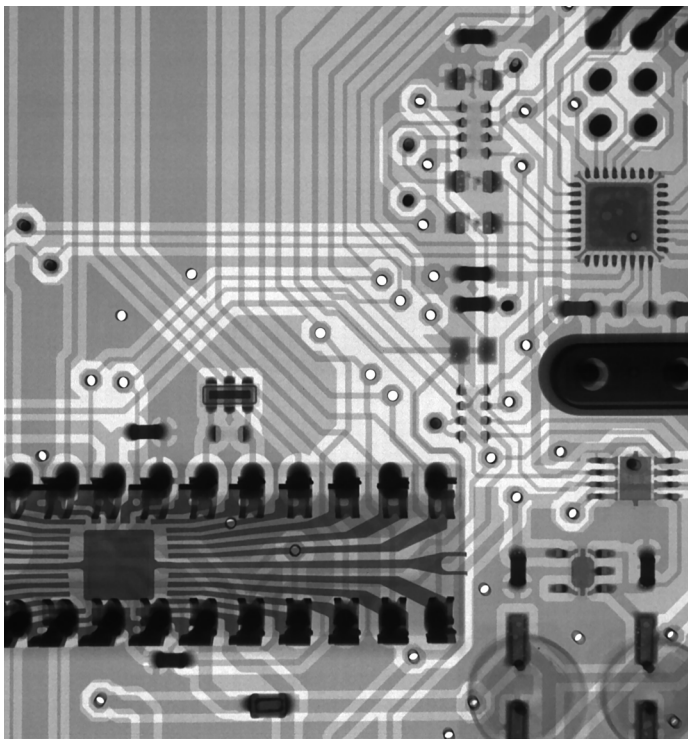
1. Recruit senior technical leaders to join every nonprofit governance board
2. Fund the Executive Director to hire a senior technical leader to sit at the decision-making table
3. Charter a technology committee of board, employee, and volunteer experts in the community
4. Mandate the new technology committee to:
    a. Assess current technical barriers to mission
    b. Prioritize those technical barriers by impact, urgency, and social return on investment
    c. Craft a roadmap of prioritized investments
    d. Reduce costs by partnering with academia and utilizing practicum students
5. Pursue funding based on the prioritized roadmap

Following this approach ensures effort isn't wasted on the wrong priority, that a stable foundation is laid first, and that future systems aren't misaligned. Leveraging external financial expertise has always been common for boards, it is time to finally leverage external technical expertise. Executive Directors have been on their own for years, focused on delivering mission amid growing demand, faced with failing technology yet not having a skilled and trusted advisor to ask for technical help. The many Chief Information Officers I know would be excited to have the opportunity to use their skills, education and knowledge to give back to the community.

> With no funding to remediate, nonprofits will continue to face significant technical barriers to their mission.

Once senior technical leadership is in place, and a stable foundation has been laid is when the opportunities to use technology to enable mission truly multiply. For example, after I steadied the technical foundation of one large nonprofit, I was able to embark on the next step of the prioritized roadmap. A volunteer

department was staffed with seven people working full time to manage 5,000 volunteers. The staff were struggling to manage using a paper calendar and had asked simply for a shared calendar. When I started digging into the many challenges in effectively managing volunteer resources it was clear there were significant process barriers preventing the dedicated staff from achieving greater impact. With the support of the Executive Director and Board, I was able to secure a $200,000 grant to invest in a world class Volunteer Management System.



Using technology to move volunteer registration from the employees and onto the many eager volunteers meant the volunteers were now able to:

1. Upload evidence of their certifications and police checks
2. Watch onboarding videos
3. Take knowledge tests
4. Sign consent and non-disclosure forms
5. Select a volunteer role that matched their skill set
6. Schedule a day and time that worked for them

All six tasks could be accomplished from the comfort of a potential volunteer's home computer or mobile phone. We maintained a way for volunteers to enroll without using the system, but 95% of the volunteers were able to develop themselves into fully knowledgeable and vetted volunteers on their own.

The social return on investment was remarkable. By the following year, the number of volunteers had doubled to 10,000, and all staff members in the volunteer department gained 20 hours back every week. The leader of the volunteer department was now able to pivot the team from administration to relationship management, and as a result, donations the following year were $5 million higher. Yet the most astounding result was the increased mission impact; with more volunteer helping hands available, the social workers were able to spend more time focused on their area of expertise, housing 40% more people the following year!

A supportive and informed Governance Board, an Executive Director who understood the importance of having a senior technology leader at the decision-making table, and funders who were willing to invest in the functions that support mission worked together to enable technology to change hundreds of lives in one year. This is the promise of technology finally realized, this is what happens when technology has the same importance to the executive and the governing board as finance.

Technology experts must be given the support, time, space, and funding to create stable foundations at nonprofits. Only with a healthy, integrated ecosystem, accessed by front line staff using reliable devices on a stable network, can the nonprofit sector achieve meaningful openness & transparency.

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