# 2020 STATE OF PHILANTHROPY TECH

## A Survey of Foundations in North America

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# EXECUTIVE SUMMARY

## Assessing Current Technology Practices in Philanthropy

In August 2020, the Technology Association of Grantmakers (TAG) conducted a survey to better understand the technology environment, practices, and perceptions of TAG members and their peers throughout North America. This year's survey builds on past surveys, which explored IT tools; management; security; diversity, equity, and inclusion (DEI); integration between IT and program teams; and how many IT staff/consultants are typically employed at foundations. TAG has also added questions about COVID-19 and how emerging societal challenges are affecting how foundations are supporting grantees and nonprofit partners.

233 foundations in North America and beyond responded. Their experiences have provided valuable insights into the current state of technology in philanthropy including:

1. How COVID-19 is affecting technology budgets and philanthropic support.
2. Ongoing challenges of building a culture of diversity, equity, and inclusion.
3. How foundations are approaching growing security threats.
4. What technology tools, practices, and management approaches are in use within philanthropy.
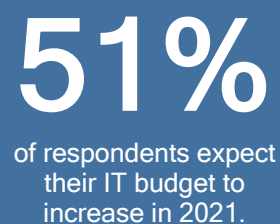
Key findings are introduced below and then explored more fully beginning on page 5.

TAG Members: Download the raw survey results (with identifiers removed) at https://www.tagtech.org/philanthropytech2020.

### THE IMPACT OF COVID-19

No sector has been unaffected by COVID-19. The pandemic closed offices throughout North America and IT departments had to work quickly to implement new processes and tools, and in some cases, provide new forms of support for grantees. The survey's qualitative data found that philanthropic organizations adapted to remote work relatively quickly and continue to recognize the value of investing in technology to support programmatic work.

**51%** of respondents expect their IT budget to increase in 2021.

- 51% of respondents expect to increase their organization's technology budget in 2021. Only 12% indicated that they would moderately or significantly decrease their technology budget.
- 61% of respondents report streamlining the grant application process in response to COVID-19, while 47% report streamlining the reporting process this year. Additional forms of new support for grantees include providing technology tools, training, and technical assistance.

For detailed results (with charts) pertaining to COVID, see page 5.

## DIVERSITY, EQUITY, AND INCLUSION IN IT DEPARTMENTS

IT departments continue to make progress in developing a culture that promotes diversity, equity, and inclusion. However, that progress has been slow. Despite increased scrutiny of racial inequities in 2020, IT departments have made relatively small improvements and many organizations are still at the early stages of internalizing and operationalizing a commitment to DEI.

- 40% of IT departments still do not have DEI programs, an 11% improvement from 2018.
- 37% of IT departments do not receive DEI training, a 3% improvement from 2018.
- Only 11% of organizations provide targeted development opportunities for diverse employees and only 12% are developing a pipeline of diverse leaders.

**40%**
of IT departments still do not have DEI programs.

For detailed results (with charts) pertaining to diversity, equity, and inclusion, see page 7.

## SECURITY TRENDS

Security continues to be a high priority for philanthropic organizations, especially as targeted attacks have risen during the pandemic. This year's survey indicates that organizations are focusing more on security than in previous years to achieve roughly similar results.

- 22% of respondents have experienced a security breach in the past two years (compared to 21% in 2018).
- Implementation or use of multi-factor authentication (MFA) jumped from 47% in 2018 to 72% this year.
- 61% of respondents now carry cybersecurity insurance (up 40% from 2018).
- To build security awareness amongst staff, 64% of organizations report using email reminders, 61% conduct training during staff meetings, and 62% perform phishing tests.

**22%**
of respondents have experienced a security breach in the past two years.

For detailed results (with charts) pertaining to security, see page 10.

## TOOLS, TECHNOLOGY, AND MANAGEMENT PRACTICES

COVID-19 accelerated the use of cloud-based tools, especially collaboration apps such as Slack and Microsoft Teams. The survey also found that Salesforce is being used by more organizations and in more ways than in previous years. Outsourcing, staffing, and integration trends persist from 2018.

- Fluxx continues to be the most-used grants management system (19% of organizations) among survey respondents.
- The number of organizations using Salesforce for grants management has doubled since 2018 (from 6% to 12%). 33% use Salesforce for constituent relationship management (CRM), increasing from 23% in 2018.
- In 2018, Microsoft Teams was a relatively new product and was not utilized enough to be measurable but in 2020, 25% of responding organizations said they use Teams for project management in addition to other uses.
- Outsourcing IT services continues to trend upward with this year's survey seeing an increase in outsourcing infrastructure support. Interestingly, however, this year's survey saw a decrease in outsourcing some services such as email administration.
- Staffing ratios continue at a rate of 1 technology team member per 17 staff. There is some variance by organization type with community foundations seeing a significant improvement since 2018.
- Integration between technology teams and programs teams remains unchanged from 2018. With an open-ended question in this year's survey; however, the full results reveal why some organizations are less siloed than others.

**17:1**
continues to be the average ratio of staff to IT staff.

For detailed results (with charts) pertaining to tools and technology, see page 12.

TAG Members: Download the raw survey results (with identifiers removed) at https://www.tagtech.org/philanthropytech2020.

## ABOUT THIS SURVEY

The results presented here are based upon answers to the "2020 State of Philanthropy Tech" survey conducted by the Technology Association of Grantmakers (TAG). For nearly a decade, TAG has conducted surveys of its members. In 2018, the TAG Survey Committee expanded its approach to include respondents beyond TAG membership and introduced new questions focused on strategy, integration with program staff as well as diversity, equity, and inclusion. In 2020, TAG further expanded the survey to include questions focused on COVID-19.

The 2020 survey contained 33 questions via SurveyMonkey. The online survey was publicly available for four weeks and promoted via email, website, and social media. 233 foundations located in North America and beyond responded.

For information about **methodology**, see page 18.
For information about **responding organizations**, see Appendix A on page 21.
For key **findings at a glance**, see Appendix B on page 22.

# KEY FINDINGS

The following sections will explore each of the four areas presented above in greater depth with supporting data and charts.

1. How COVID-19 is affecting technology budgets and philanthropic support practices.
2. Ongoing challenges of building a culture of diversity, equity, and inclusion.
3. How foundations are approaching growing security threats.
4. What technology tools, practices, and management approaches are in use within philanthropy.

TAG Members: Download the raw survey results (with identifiers removed) at
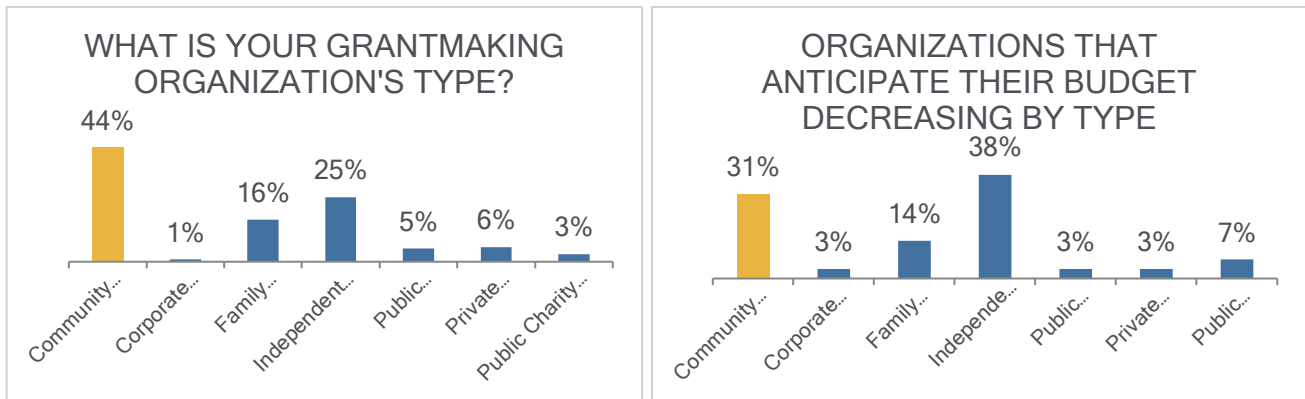https://www.tagtech.org/philanthropytech2020.

## THE IMPACT OF COVID-19

The survey included new questions aimed at understanding how COVID-19 affected the decisions IT departments made in 2020. The results indicate that many foundations are leaning into the new challenges presented by the pandemic.

> **51% of respondents expect to increase their organization's technology budget in 2021. Only 12% indicated that they would moderately or significantly decrease their technology budget.**

Community foundations in particular are choosing to invest more heavily in IT. More than half (58%) said they expect to moderately or significantly increase their technology budgets.



HOW DO YOU ANTICIPATE YOUR ORGANIZATION'S TECHNOLOGY BUDGET WILL CHANGE IN 2021?
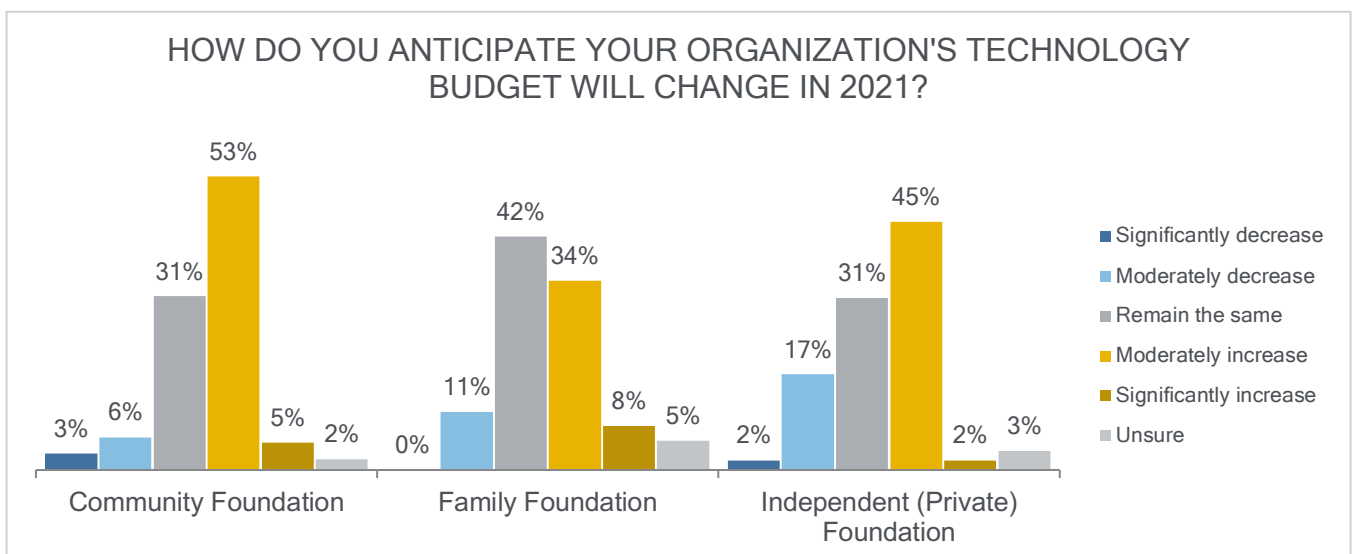
**While community foundations make up 44% of the organizations we surveyed, they only account for 31% of the organizations that say they plan to decrease their budget.**



**WHAT IS YOUR GRANTMAKING ORGANIZATION'S TYPE?**

44% Community...
1% Corporate...
16% Family...
25% Independent...
5% Public...
6% Private...
3% Public Charity...

**ORGANIZATIONS THAT ANTICIPATE THEIR BUDGET DECREASING BY TYPE**

31% Community...
3% Corporate...
14% Family...
38% Independe...
3% Public...
3% Private...
7% Public...

When describing how their organizations responded to COVID-19, respondents report largely positive experiences transitioning their teams to remote working. Many respondents had already implemented many of the tools necessary for teams to work outside of the office or were in the process of doing so. The shutdown accelerated their work and user adoption. The mass closure of offices also helped crystalize conversations that organizations were having about how they work and the technology they need to do it. One respondent said, "[The shutdown] allowed IT to demonstrate that a remote workforce is not only possible, but productive."

**"The structure was in place when COVID-19 hit and the team was brought up to speed very quickly on Skype use and working remotely. They did a great job!"**
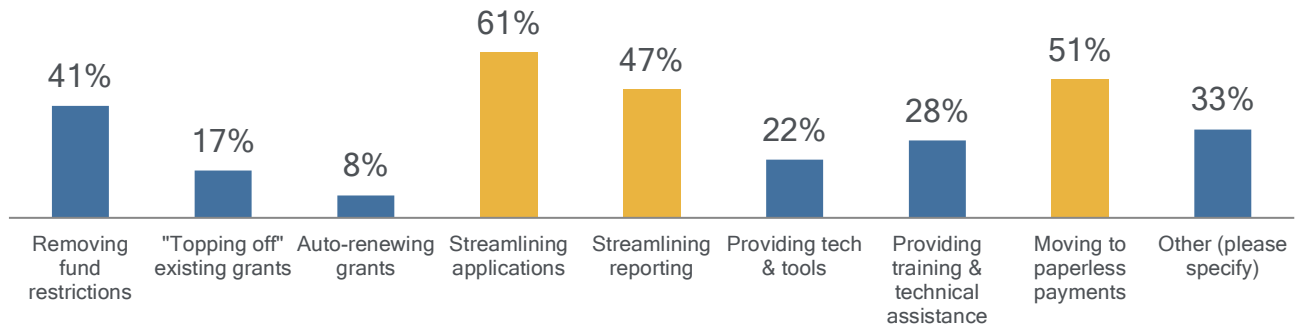
A few organizations did struggle through the spring and into summer. Some reported being forced to delay projects that were planned. And most IT staff worked long hours in March and April to make the sudden transition to remote working. However, the general feeling in the survey responses was positive. "The pandemic brought [our organization] to more holistically integrate technology into the mission of the foundation," reported another respondent.

**Support for grantee technology is getting more attention.**

In response to the pandemic, organizations indicated they are supporting grantees in many new ways including streamlining applications (61%), moving to paperless payments (51%), and streamlining reporting (47%).  "Our competitive grant program already awarded unrestricted operating support, so we haven't changed that. However, we are escalating payments so the process is not a three- or four-month wait for the grantees to receive their funding," said one respondent.

Beyond supporting the grantmaking process, organizations also indicate a new willingness to provide technology tools (22%) and technology training or support (28%).

**IN WHAT NEW WAYS HAS YOUR ORGANIZATION SUPPORTED GRANTEES/ NONPROFIT PARTNERS IN RESPONSE TO SOCIETY'S CHALLENGES IN 2020?**

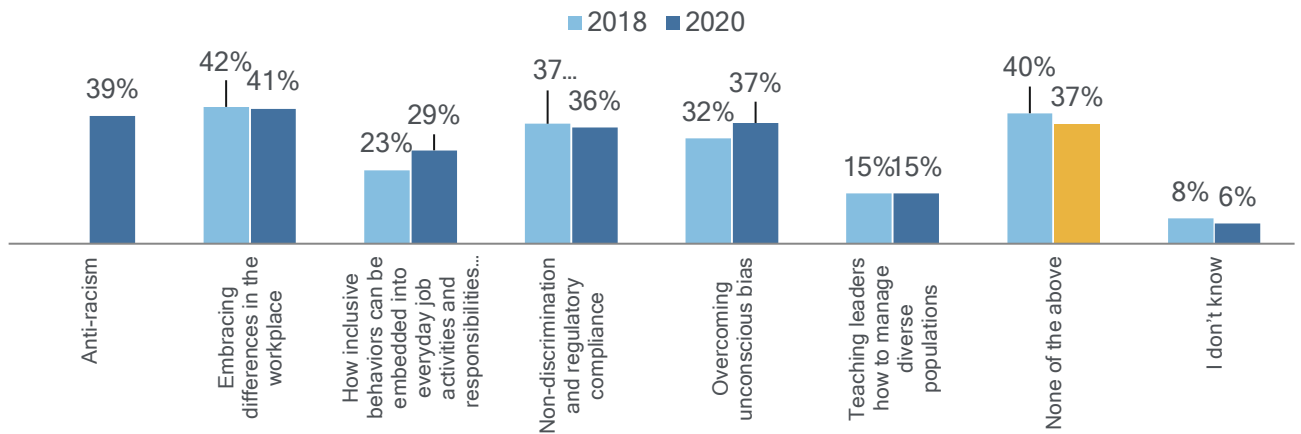| Category | Value |
|---|---|
| Removing fund restrictions | 41% |
| "Topping off" existing grants | 17% |
| Auto-renewing grants | 8% |
| Streamlining applications | 61% |
| Streamlining reporting | 47% |
| Providing tech & tools | 22% |
| Providing training & technical assistance | 28% |
| Moving to paperless payments | 51% |
| Other (please specify) | 33% |

## DIVERSITY, EQUITY, AND INCLUSION IN IT DEPARTMENTS

In 2020, TAG again asked questions related to diversity, equity, and inclusion (DEI). This year, questions were updated within the context of society's important focus on racial equity. For example, this year's survey included "anti-racism training" among the options for training types offered to technology staff.

Overall, the 2020 State of Philanthropy Tech survey shows some progress related to DEI when compared to 2018 State of Philanthropy Tech. Many organizations are working on building a DEI culture and that work, although slow, is reaching some IT departments. However, analysis of the 2020 survey finds that many organizations are still in the early stages of changing their culture and too often IT is not seen as integral to that broader cultural transformation.

> **37% said "none of the above" when asked what DEI training their organizations offered to technology staff.**
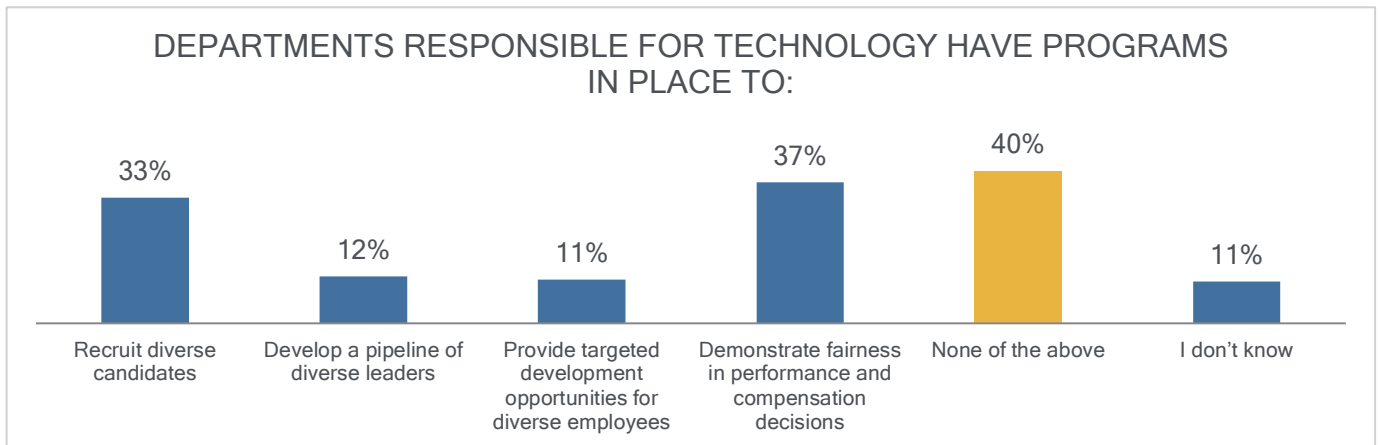
**STAFF RESPONSIBLE FOR TECHNOLOGY ARE OFFERED TRAINING THAT FOCUSES ON:**

■2018 ■2020

| Category | 2018 | 2020 |
|---|---|---|
| Anti-racism | | 39% |
| Embracing differences in the workplace | 42% | 41% |
| How inclusive behaviors can be embedded into everyday job activities and responsibilities... | 23% | 29% |
| Non-discrimination and regulatory compliance | 37... | 36% |
| Overcoming unconscious bias | 32% | 37% |
| Teaching leaders how to manage diverse populations | 15% | 15% |
| None of the above | 40% | 37% |
| I don't know | 8% | 6% |

The number of organizations that offered no DEI training to technology staff has improved slightly from the 40% reported in 2018. Rates of inclusion training and "overcoming unconscious bias" improved the most, but no area of training saw a large increase.

It's notable that 70% who reported "none of the above" on training have one or fewer IT staff members or contractors, and 78% of these fully or partially outsource systems/network administration and server administration. It's possible that some organizations assume that their IT departments are too small to warrant DEI training or that it's the responsibility of contractors to do their own training.

**40% said "none of the above" when asked what DEI programs (in contrast to training as noted above) their organizations have in place for technology departments.**



DEPARTMENTS RESPONSIBLE FOR TECHNOLOGY HAVE PROGRAMS IN PLACE TO:

| Recruit diverse candidates | Develop a pipeline of diverse leaders | Provide targeted development opportunities for diverse employees | Demonstrate fairness in performance and compensation decisions | None of the above | I don't know |
|---|---|---|---|---|---|
| 33% | 12% | 11% | 37% | 40% | 11% |

Of the 40% of organizations that answered "none of the above" regarding DEI training, 73% also have no DEI programs in place, which indicates that the challenge runs much deeper than a lack of training. The role of IT departments in transforming organizational cultures continues to be overlooked and leaders may be failing to recognize how approaches to technology can undermine equity and further exclusion.

**Those organizations who do provide DEI training to technology teams tend to also have DEI programs in place for technology departments. Community foundations lag in both areas while public charity grantmakers lead the pack.**

As the chart below shows, the organizations that are investing more significantly in training are also investing in programs. Public charity grantmakers have made the most progress among the respondents to the survey, but significant work lies ahead with community foundations lagging in both training and programs for technology teams and departments.

**DEI PROGRAMS AND TRAININGS OFFERED BY:**
**ALL RESPONDENTS**
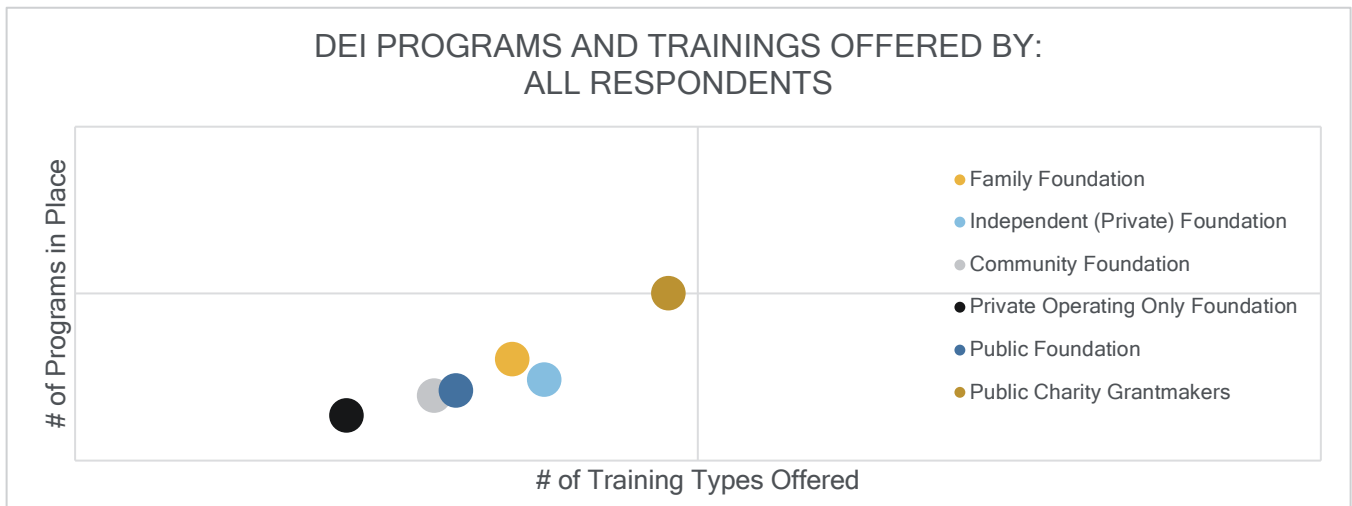
Promisingly, the survey data shows an important correlation between the 12% of organizations with programs to "develop a pipeline of diverse leaders" and those with multiple DEI programs. How might we interpret this correlation?

One way to understand the data might be that organizations with a commitment to develop a pipeline of diverse leaders have moved beyond "checking a box" by recruiting diverse candidates and additionally have developed a commitment to deeper equity and inclusion at the leadership level and more. To be sure, organizations that recruit diverse candidates have taken one significant step, but the survey data shows that organizations with a mature commitment to DEI have developed other programs such as providing leadership development opportunities or teaching leaders how to manage diverse populations.

**The data shows an emerging maturity model for the work of DEI in organizations.**



**DEI PROGRAMS AND TRAININGS OFFERED BY:**
**RESPONDENTS WHO "DEVELOP A PIPELINE OF DIVERSE LEADERS"**
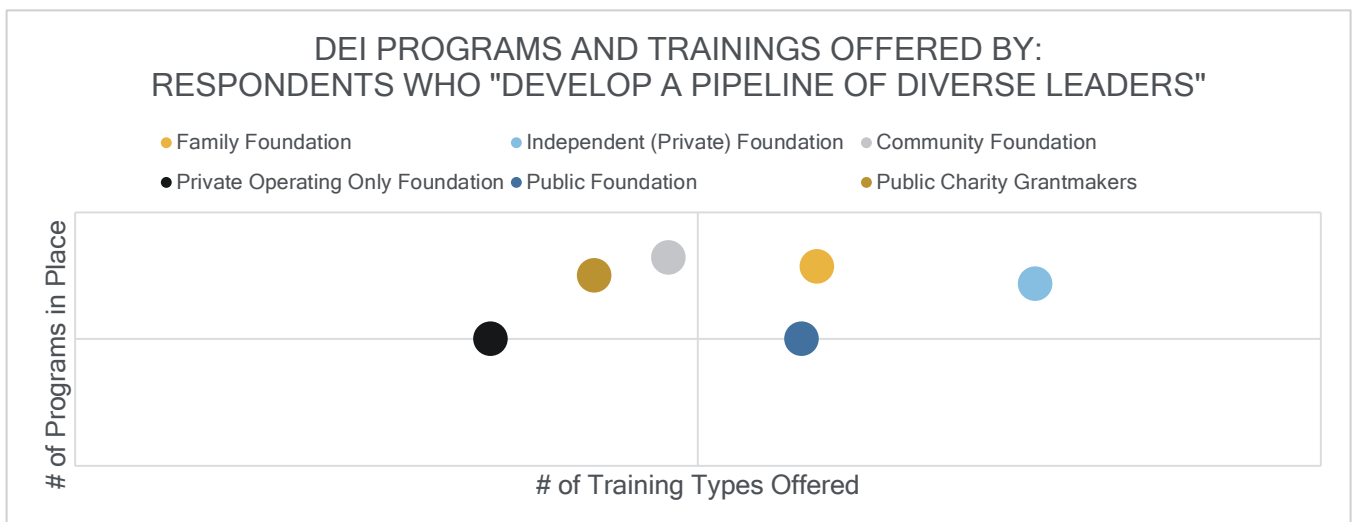
Looking ahead, organizations will need to do more than check a box or two. Investing in multiple DEI programs and training for operations teams—including technology staff—will better support a broader cultural change. For example, foundations would demonstrate a deeper commitment by investing in training for contractors in addition to staff.

# SECURITY BREACHES & PRACTICES

Over the past two years since our last survey, organizations appear to be making strategic investments in security tools and training. A significant majority also have multiple security policies in place and about half (46%) have an incident response plan[1]. It's not a coincidence that organizations are focusing more on security. The shift to remote working and the increase in attacks seen more broadly after COVID-19 hit demands serious attention. One respondent reported: "Technology has been critical for our success in working remotely since March 2020. We had fortunately just converted to a cloud-based database and financial platform, which helped ease the transition. We are now tightening up security and further streamlining our software."

**% REPORTING SECURITY BREACH**



**22% of respondents have experienced a security breach in the past two years (compared to 21% in 2018).**
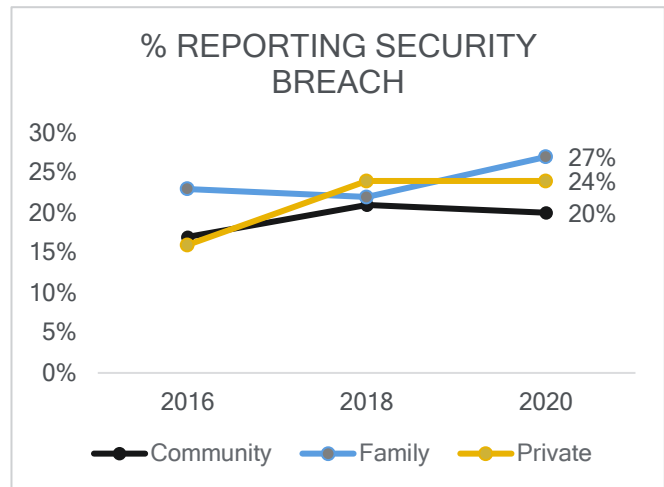
Community, family, and private foundations have all seen an increase in security breaches since 2016. However, since 2018 both community foundations and private foundations saw virtually no change. Family foundations reporting a breach increased from 22% in 2018 to 27% in 2020.

**Multi-factor authentication has gained adoption since 2018.**

Use of multi-factor authentication (MFA) jumped from 47% in 2018 to 72% this year. This change reflects both the increase in the number of vendors offering MFA and the recognition that MFA is a low-cost, low-impact way to significantly improve security. Malware products and email gateway protection each increased 10% from 2018.



WHAT NETWORK SECURITY PRODUCTS DO YOU CURRENTLY HAVE IN PLACE?

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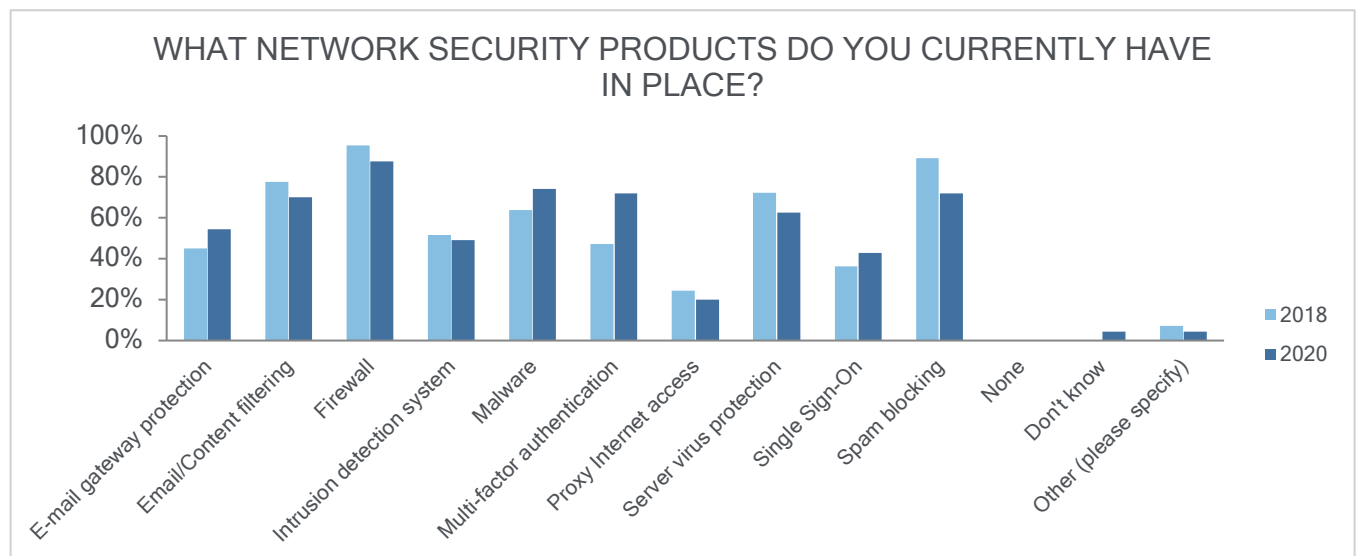
[1] Data on security practices such as the use of an incident response plan is available for TAG members to download at tagtech.org/philanthropytech2020.

> **To build security awareness amongst staff, 64% of organizations report using email reminders, 61% conduct training during staff meetings, and 62% perform phishing tests.**

In terms of security training, many organizations use a similar approach. Training during staff meetings, email security reminders, and phish testing are popular, and few organizations conduct broader social engineering tests or require staff members to pass a test before providing network access. One interesting difference was in-person employee training. Forty-five percent of family foundations provide in-person training versus about 30% at community and independent foundations.



HOW DOES YOUR ORGANIZATION PROVIDE SECURITY AWARENESS TRAINING TO EMPLOYEES?
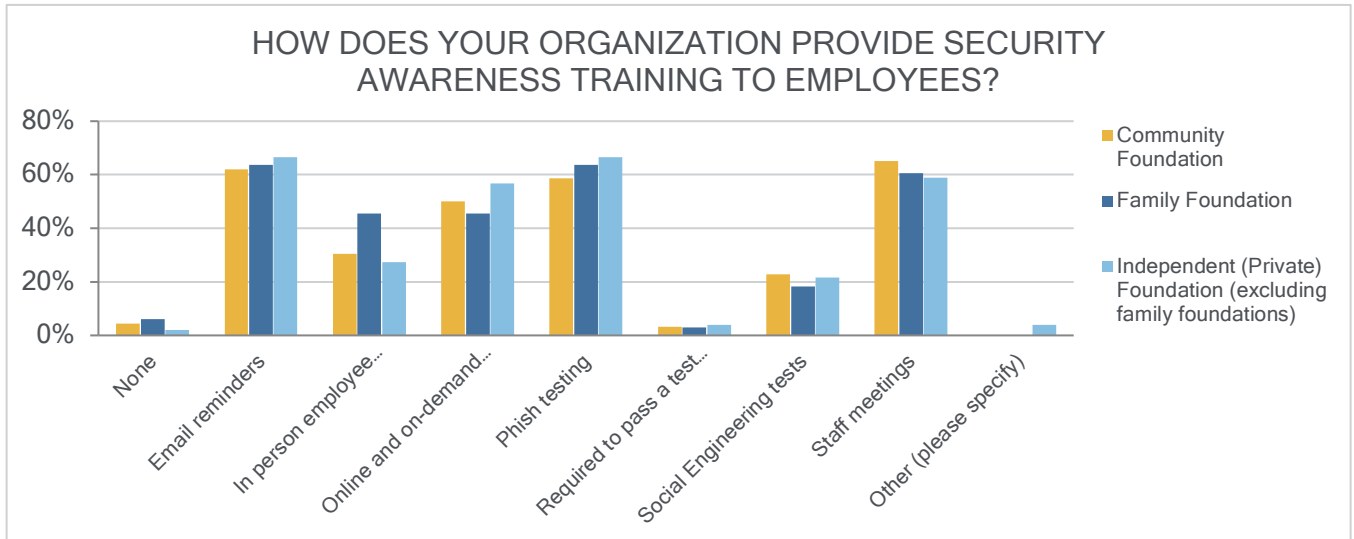
> **The lowest breach rates occurred at organizations using Watchdog or Checkpoint for intrusion detection.**



% OF SECURITY BREACHES ACROSS ORGANIZATIONS USING EACH PRODUCT FOR INTRUSION DETECTION
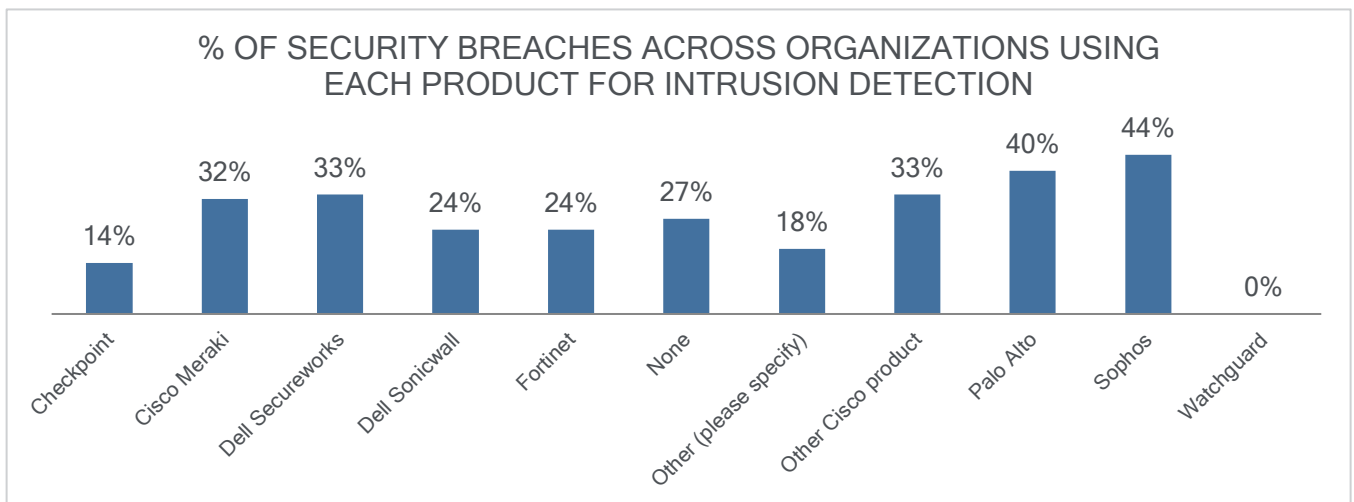
**61% of respondents now carry cybersecurity insurance (up 40% from 2018) with trends being relatively similar between community, family, and private independent foundations.**
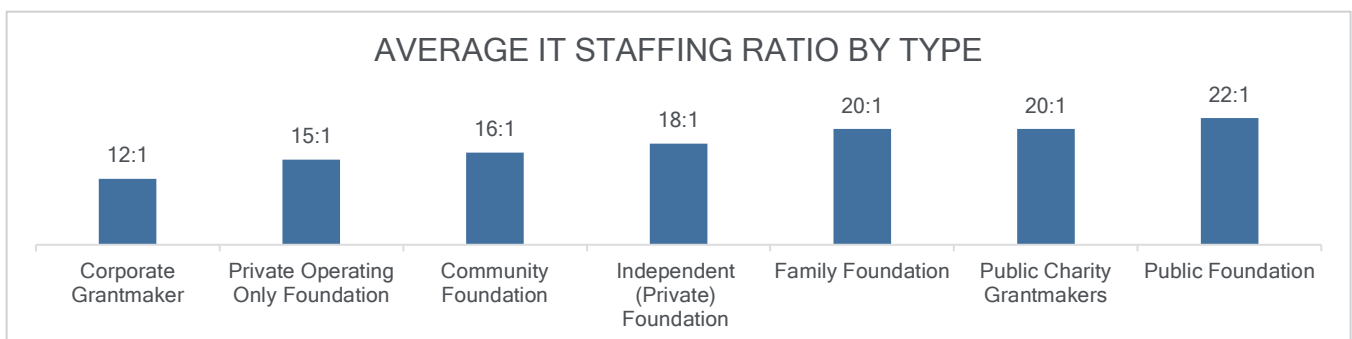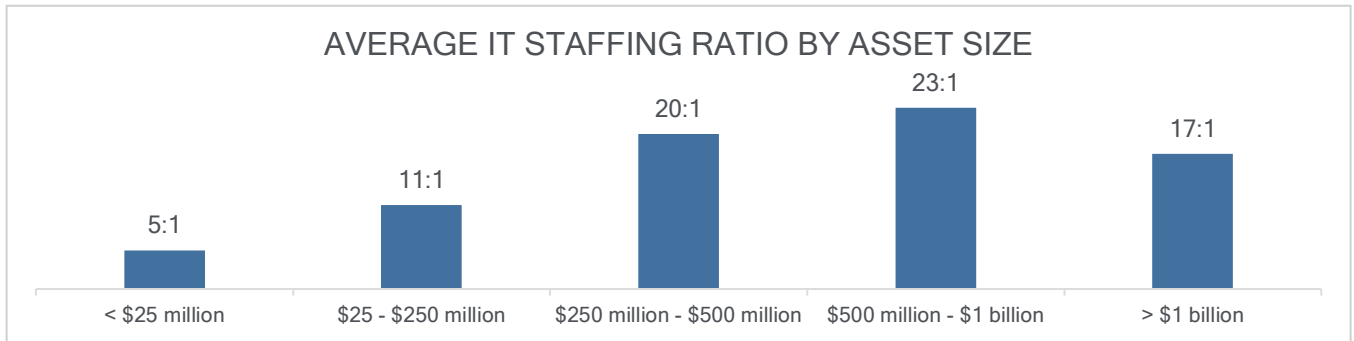
### DO YOU HAVE CYBER SECURITY INSURANCE?
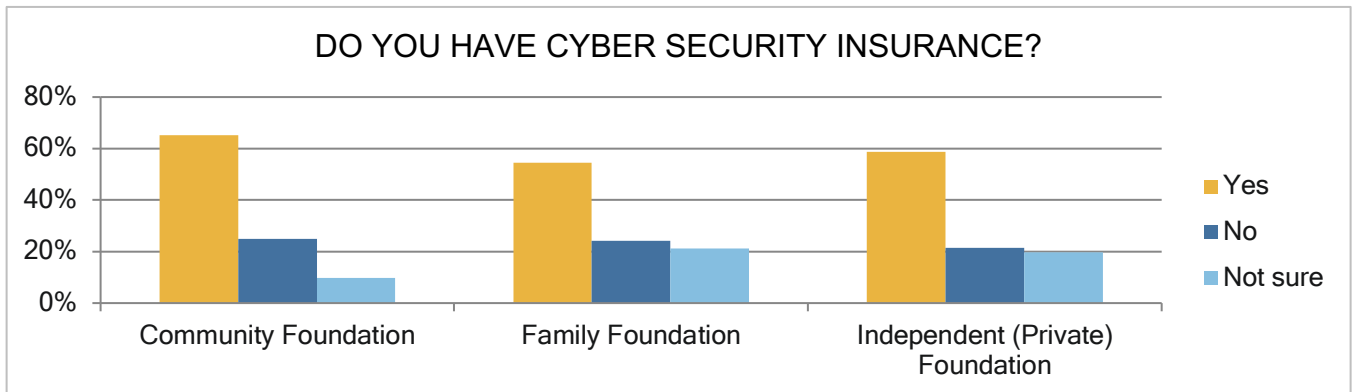


## TOOLS, TECHNOLOGY, AND MANAGEMENT PRACTICES

In the area of tools, technology, and management practices, this year's survey reveals a continuation of previous trends. IT staffing ratios have changed little since 2018 and the perception of IT has also not changed significantly. However, IT seems to play a more integrated role at smaller organizations as well as organizations with larger endowments, while midsized organizations are less likely to involve technology staff in program strategy. Organizations continue to outsource many technology services reflecting a broader trend in philanthropy operations.

Regarding tools, the survey shows emerging trends in core systems with Salesforce's market share growing significantly in both grants management and customer relationship management (CRM). Microsoft is also increasing its market share, both in project management tools (where Teams has emerged as a popular option) and file hosting.

**Staffing ratios hold steady at one IT person for every 17 staff members on average. For community foundations, however, the 2020 ratio (16:1) is a significant improvement over the 2018 ratio of 21:1.**

### AVERAGE IT STAFFING RATIO BY TYPE

## AVERAGE IT STAFFING RATIO BY ASSET SIZE



| | | | | |
|---|---|---|---|---|
| 5:1 | 11:1 | 20:1 | 23:1 | 17:1 |
| < $25 million | $25 - $250 million | $250 million - $500 million | $500 million - $1 billion | > $1 billion |

**64% of respondents believe that IT is perceived as a strategic partner or leader.**

Compared to 2018, an increasing number of family and private foundations perceive IT as a strategic partner. Overall, 60% in 2018 viewed IT as a strategic partner or leader.



ORGANIZATION'S PERCEIVED ROLE OF IT
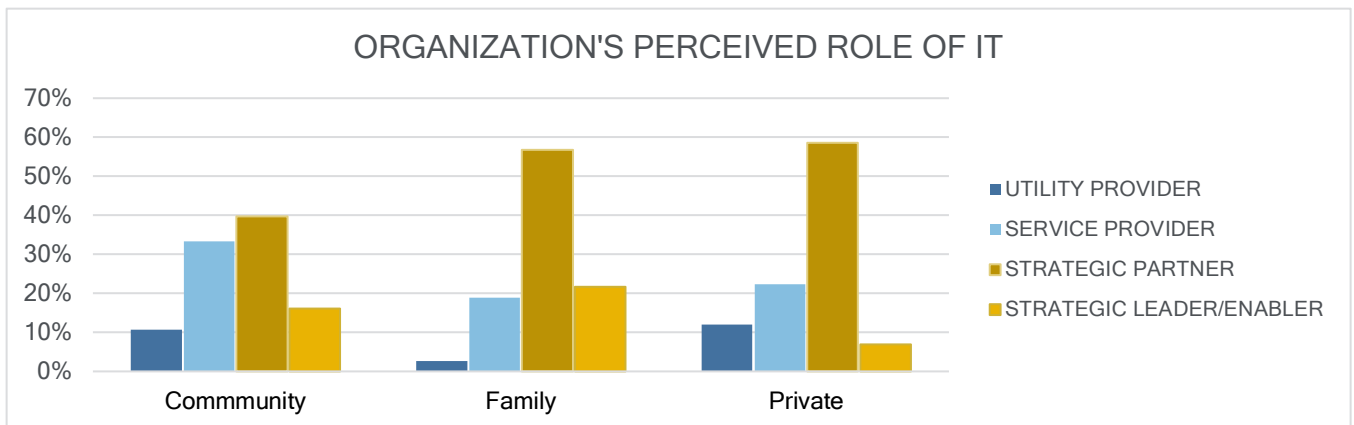
Again in 2020, the survey inquired about integration between IT and program strategy or grantmaking. Results indicate that the level of involvement of IT in program strategy or grantmaking remains unchanged from 2018 but there are some interesting differences based upon organization size as measured in assets.

**72% of mid-sized organizations (those reporting $250 – $500 million in assets) never or rarely involve their IT staff in program strategy.**



TO WHAT EXTENT ARE TECHNOLOGY STAFF INVOLVED IN PROGRAM STRATEGY?
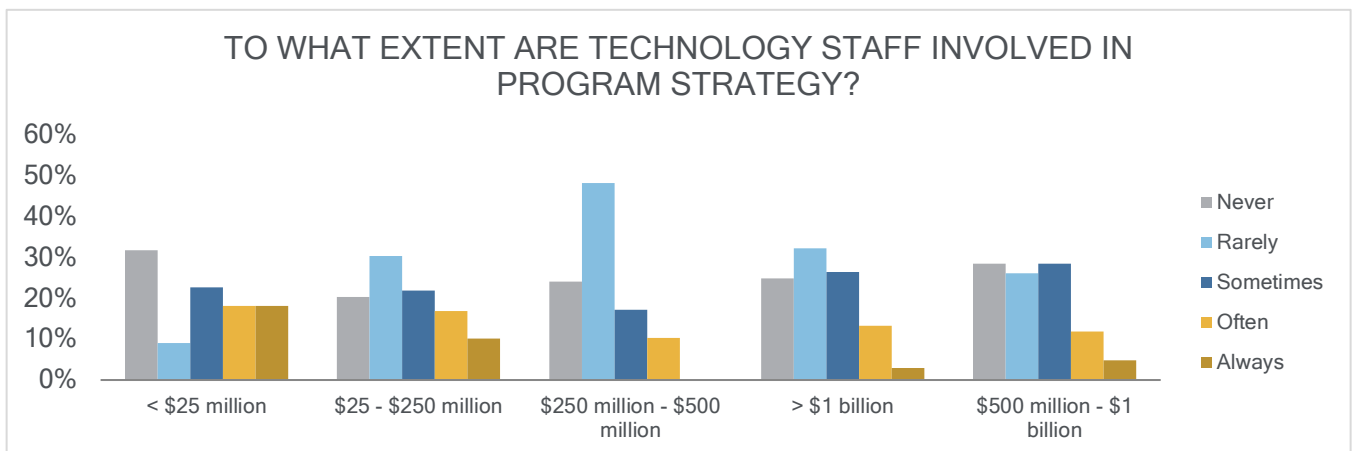
Additionally, the survey finds that the smallest organizations are the most likely to involve IT staff in grantmaking. Of the organizations with a budget below $25 million, 45% at least sometimes involve IT staff compared to about 20% of organizations with a budget above $250 million involving IT staff.

Often, the involvement of IT is the result of staff members filling multiple roles. One respondent said, "I collaborate with our senior team on strategy and also happen to have a program focus on making recommendations to the board about grantmaking." Another respondent said: "I am tech, grants management, and program so I have my hand in many buckets."
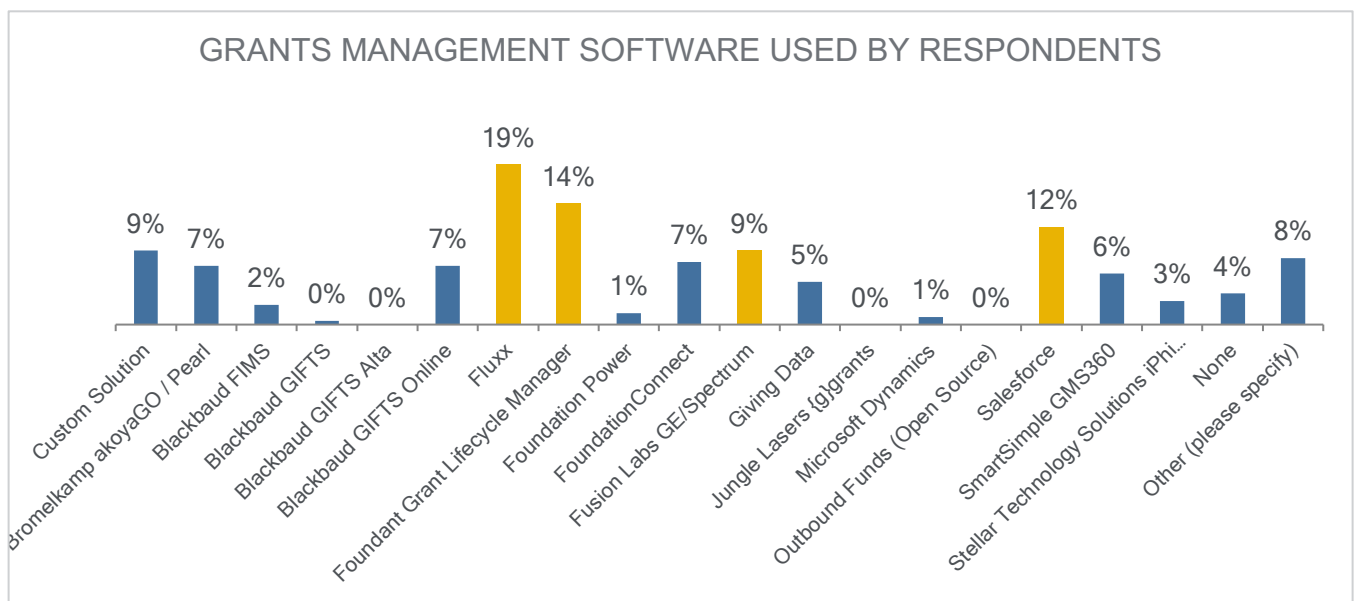
However, others more intentionally integrate IT into other processes. "We are invited in to consult on initiatives that have a strong emphasis on technology. We sometimes make grants for technology initiatives, but always in partnership with a programming team member. As an organization, we take time to consider how technology can help us achieve our mission," reported one respondent.

**The most popular grants management systems have gained market share since 2018 with Salesforce emerging as one of several leading choices.**

The top four systems with the highest usage include:
- 19% using Fluxx (up 4% from 2018).
- 14% using Foundant Grant Lifecycle Manager (up 6% from 2018).
- 12% using Salesforce (up 6% compared to 2018 write-in responses).
- 9% using Fusion Labs GE/Spectrum (up 1% from 2018).

TAG Members: Download the raw survey results (with identifiers removed) at https://www.tagtech.org/philanthropytech2020.

GRANTS MANAGEMENT SOFTWARE USED BY RESPONDENTS

| Software | Percentage |
|---|---|
| Custom Solution | 9% |
| Bromelkamp akoyaGO / Pearl | 7% |
| Blackbaud FIMS | 2% |
| Blackbaud GIFTS | 0% |
| Blackbaud GIFTS Alta | 0% |
| Blackbaud GIFTS Online | 7% |
| Fluxx | 19% |
| Foundant Grant Lifecycle Manager | 14% |
| Foundation Power | 1% |
| FoundationConnect | 7% |
| Fusion Labs GE/Spectrum | 9% |
| Giving Data | 5% |
| Jungle Lasers {g}grants | 0% |
| Microsoft Dynamics | 1% |
| Outbound Funds (Open Source) | 0% |
| Salesforce | 12% |
| SmartSimple GMS360 | 6% |
| Stellar Technology Solutions iPhi... | 3% |
| None | 4% |
| Other (please specify) | 8% |

For more details about these and other Grants Management Systems, refer to **A Consumer's Guide to Integrated Software for Community Foundations** and **A Consumer's Guide to Grants Management Systems**.
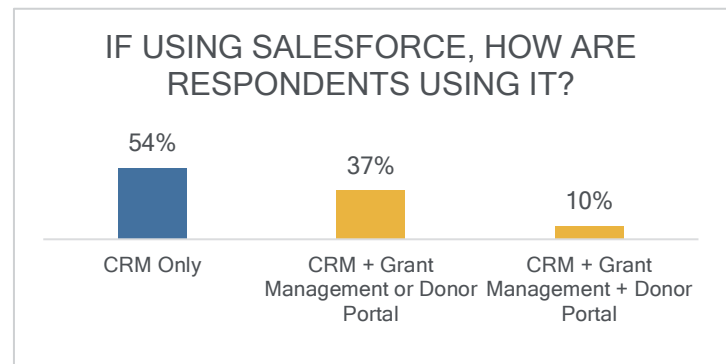
**CRM usage is increasing and Salesforce is significantly growing its market share.**

- 14% of respondents said they're using no CRM software, down from 21% in 2018.
- 33% report using Salesforce for CRM, up 10% from 2018.
- 19% of respondents report using their grants management system as a CRM system, down 3% from 2018.
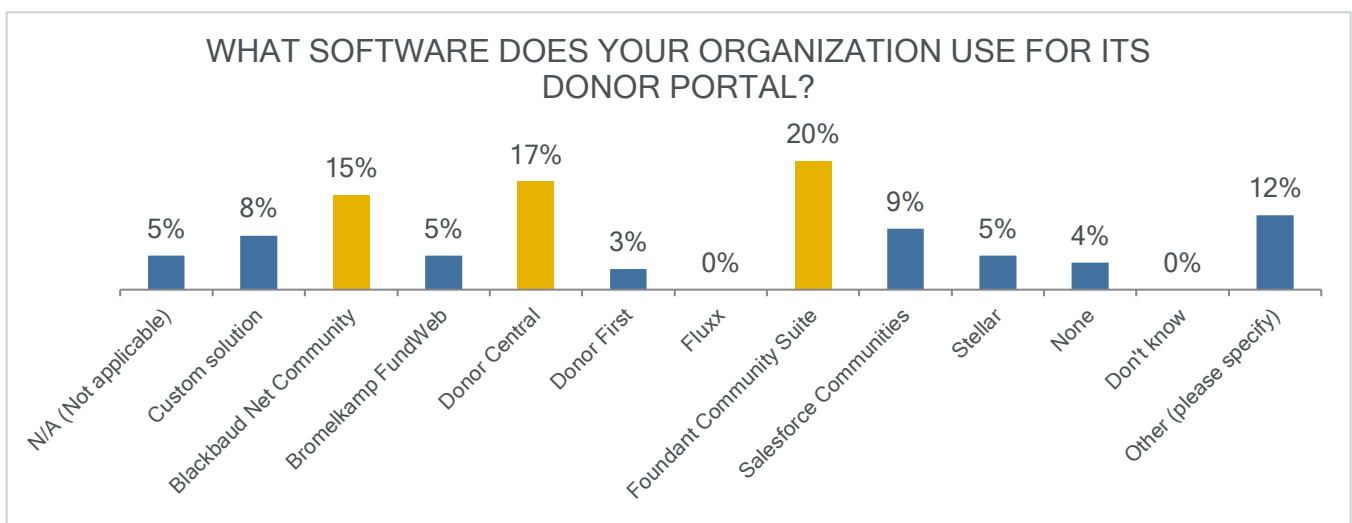
**CUSTOMER RELATIONSHIP MANAGEMENT (CRM) SOFTWARE USED BY RESPONDENTS**

| Blackbaud CRM | Blackbaud Raiser's Edge or eTapestry | FIMS CRM | Foundant Community Suite | Microsoft Dynamics CRM | Salesforce | We use our grants management system for CRM | None | Don't know | Other (please specify) |
|---|---|---|---|---|---|---|---|---|---|
| 1% | 12% | 4% | 10% | 6% | 33% | 19% | 14% | 2% | 9% |
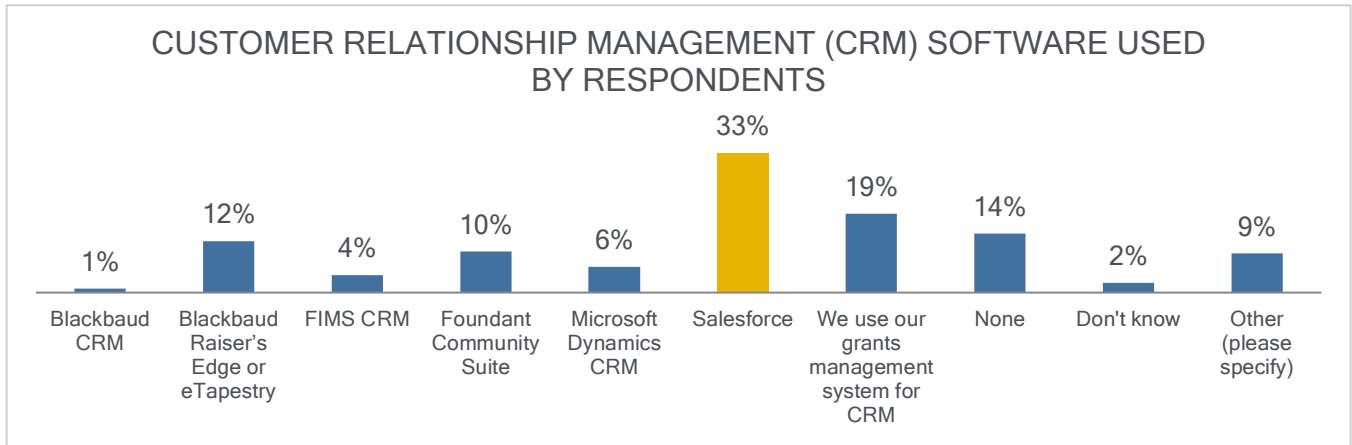
**47% of organizations that use Salesforce for CRM also use it for grants management, as a donor portal, or both.**

It's clear that more philanthropic organizations are viewing Salesforce as an all-in-one solution, perhaps indicating a shift in IT decision-makers' approach as they seek a core system to integrate their tool stack.

**IF USING SALESFORCE, HOW ARE RESPONDENTS USING IT?**

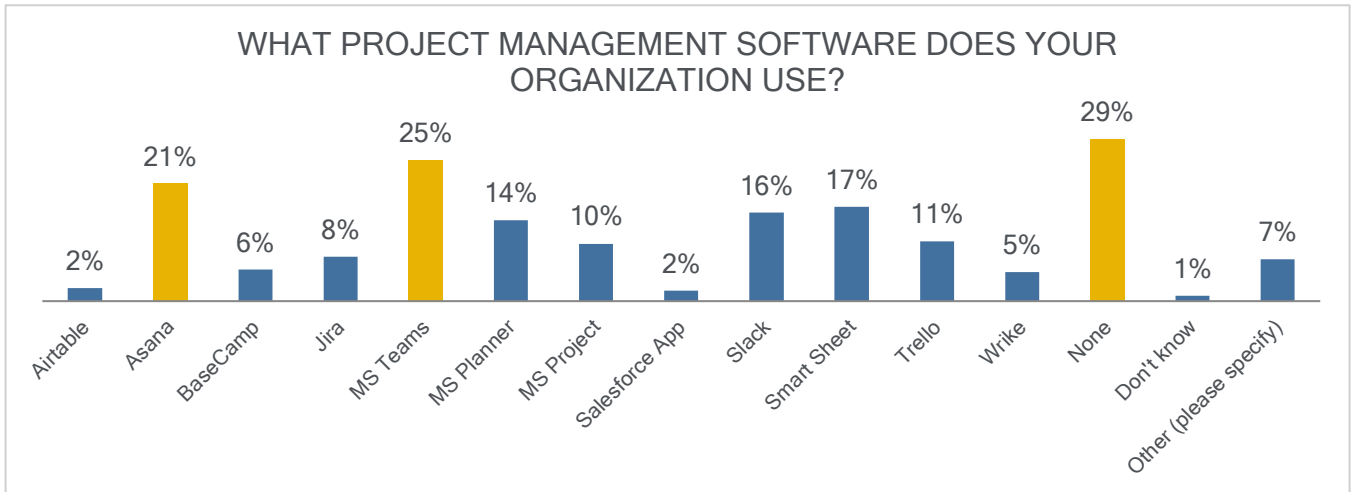| CRM Only | CRM + Grant Management or Donor Portal | CRM + Grant Management + Donor Portal |
|---|---|---|
| 54% | 37% | 10% |

**Donor portals are vital for most community foundations with popular choices including Foundant Community Suite, Donor Central, and Blackbaud Net Community.**

**WHAT SOFTWARE DOES YOUR ORGANIZATION USE FOR ITS DONOR PORTAL?**

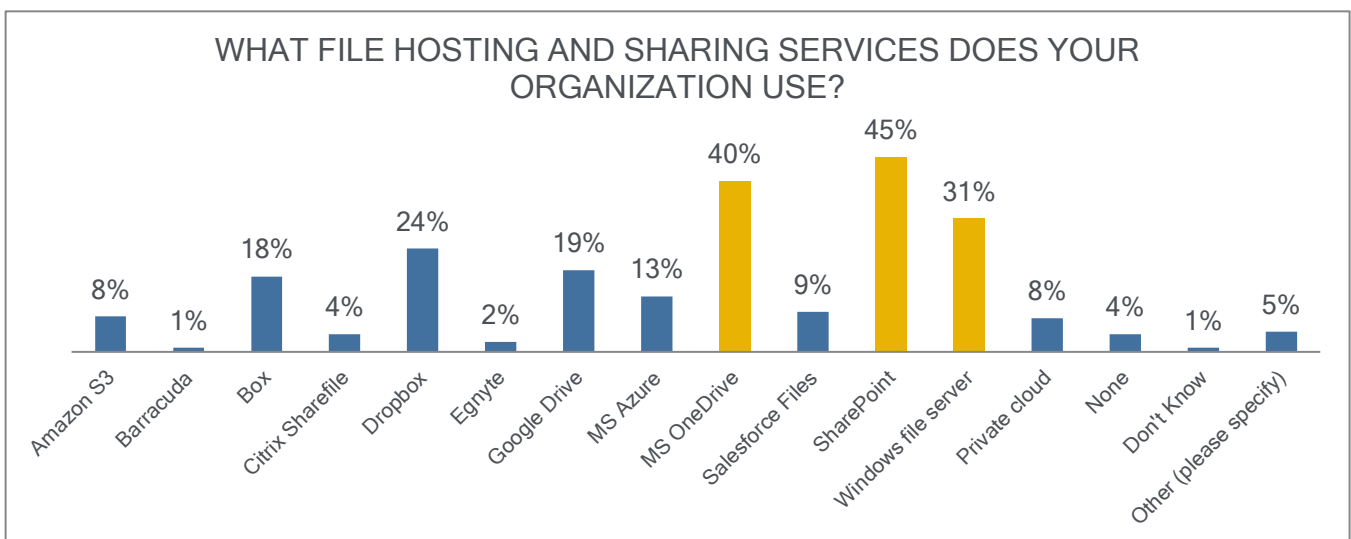| N/A (Not applicable) | Custom solution | Blackbaud Net Community | Bromelkamp FundWeb | Donor Central | Donor First | Fluxx | Foundant Community Suite | Salesforce Communities | Stellar | None | Don't know | Other (please specify) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 5% | 8% | 15% | 5% | 17% | 3% | 0% | 20% | 9% | 5% | 4% | 0% | 12% |

**More organizations are using project management software than in 2018. Microsoft Teams has emerged rapidly as the most popular tool.**

- 29% of responding foundations said that staff members use no project management software, down 5% from 2018.
- 25% of the organizations surveyed use Microsoft Teams. Teams was not included in the 2018 survey.
- In addition to Teams, Jira, MS Planner, and Smart Sheet saw the biggest increases since 2018.

WHAT PROJECT MANAGEMENT SOFTWARE DOES YOUR ORGANIZATION USE?

| Airtable | Asana | BaseCamp | Jira | MS Teams | MS Planner | MS Project | Salesforce App | Slack | Smart Sheet | Trello | Wrike | None | Don't know | Other (please specify) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 2% | 21% | 6% | 8% | 25% | 14% | 10% | 2% | 16% | 17% | 11% | 5% | 29% | 1% | 7% |

**Microsoft continues to lead the transition to cloud-based file hosting and sharing.**

- 45% of respondents reported using SharePoint (up 13% from 2018) and 40% use OneDrive (unchanged).
- 31% still use a Windows file server, down by 5% from 2018.

WHAT FILE HOSTING AND SHARING SERVICES DOES YOUR ORGANIZATION USE?

| Amazon S3 | Barracuda | Box | Citrix Sharefile | Dropbox | Egnyte | Google Drive | MS Azure | MS OneDrive | Salesforce Files | SharePoint | Windows file server | Private cloud | None | Don't Know | Other (please specify) |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 8% | 1% | 18% | 4% | 24% | 2% | 19% | 13% | 40% | 9% | 45% | 31% | 8% | 4% | 1% | 5% |

**Outsourcing trends continue to show a shift away from in-house staffing of technology support and services.**

- 48% outsource server administration and 29% outsource device administration, both big jumps and indicators that an increasing number of organizations are fully outsourcing IT.
- 44% outsource systems/network administration.
- 31% outsource cybersecurity.

There are some exceptions, however, with the following services seeing a decrease or continued use of in-house staff:

- Fully outsourced email services decreased from 48% in 2018 to 29% in 2020.
- Database administration and back-offices operations are the **least** likely to be outsourced.



WHICH OF THE FOLLOWING TECHNICAL SERVICES DOES YOUR ORGANIZATION FULLY OUTSOURCE?
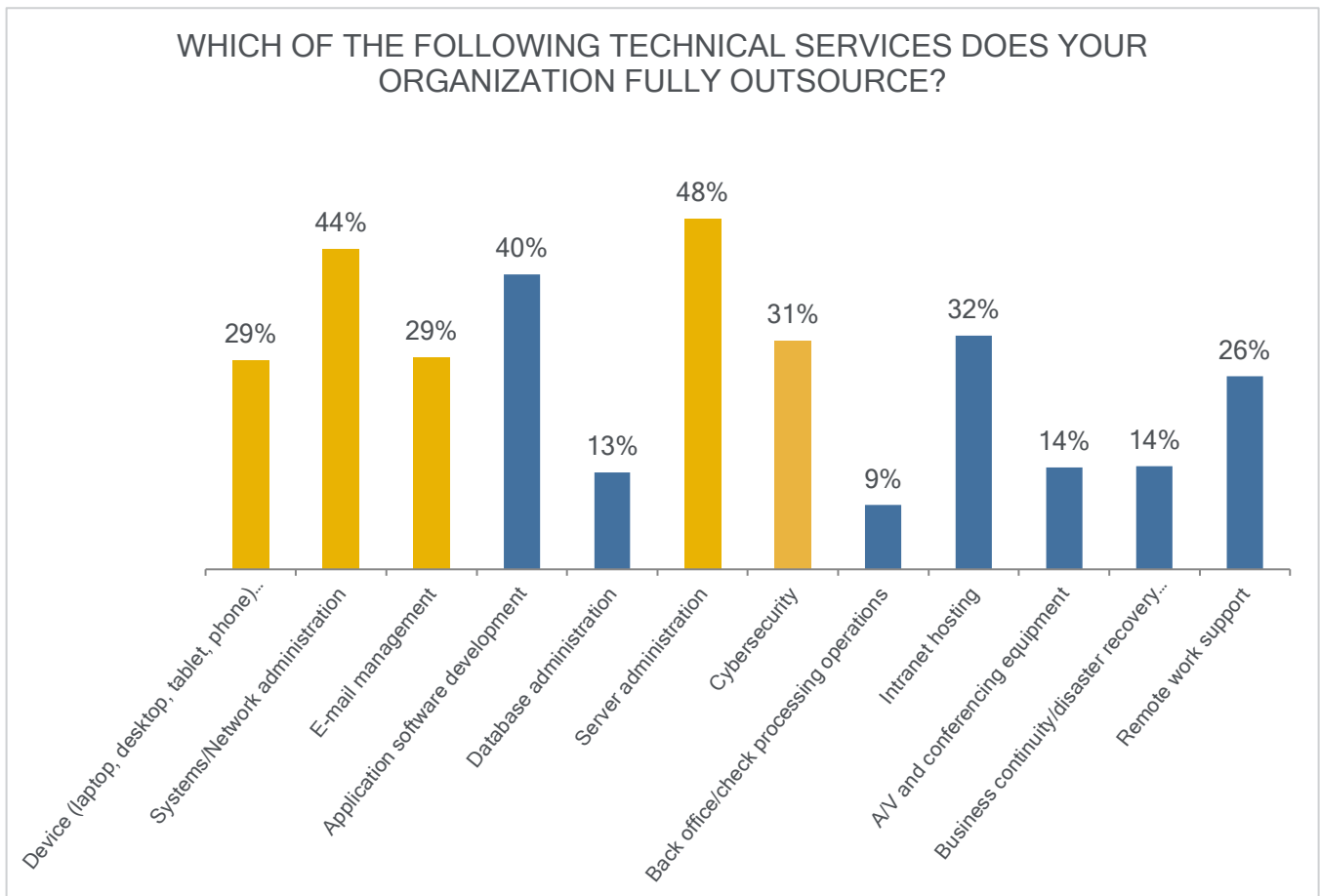
# METHODOLOGY

The results presented here are based upon answers to the "2020 State of Philanthropy Tech" survey conducted by the Technology Association of Grantmakers (TAG). For more than a decade, TAG has conducted surveys of its members focused on technology, management, and security.

In 2020, the Technology Association of Grantmakers' Survey Committee, led by Laura Goff, VP for Information Technology, Marin Community Foundation, continued to build on 2018 by including respondents beyond TAG membership. The 2020 survey included the following:
- Selected questions from previous TAG Technology Management surveys
- Selected questions from previous TAG Tools surveys
- Selected questions from previous TAG Security surveys
- New questions related to COVID-19.

The final survey contained 33 questions via SurveyMonkey. The online survey was publicly available for four weeks and promoted via email, website, and social media. 233 foundations located throughout North America responded. For information about responding organizations, see the appendix on page 20.

## STRENGTHS
- The 2020 approach, leveraging selected questions from previous surveys, has enabled TAG to conduct trends analysis on topics such as security breaches, perceptions of the strategic role of IT, and the use of outsourcing.
- Enabling non-TAG members to respond has widened the lens through which the philanthropic sector reflects upon its current state.
- The addition of questions related to diversity, equity, and inclusion (DEI) in 2018 raised important questions about the extent to which IT departments are being included in training and awareness programs within foundations. Continuing this reflection in 2020 enables foundations to assess the extent to which progress is underway.
- The inclusion of open-ended questions related to COVID support and program integration enable further elevation of best practices and case studies in the months to come.

## LIMITATIONS
- Statistical significance was not calculated for findings contained in this report.
- Only two (2) corporate foundations responded, limiting the ability to make meaningful inferences based on the data.

# CREDITS

The *2020 State of Philanthropy Tech* survey, as well as the results presented here, were developed by the Technology Association of Grantmakers' Survey Committee led by Laura Goff, Vice President for Information Technology at the Marin Community Foundation and Chantal Forster, Executive Director of the Technology Association of Grantmakers.

Committee members include:

Barb Ryan, Bromelkamp Company
Chantal Buard, Impact Atlas
James Law, Grantbook
Jeffrey Jimenez-Kurlander, Surdna Foundation
Lucas Cherry, The Signatry
Roland Kennedy, Bloomberg Philanthropies

Additional analysis and editing were conducted by Tech Impact.

# APPENDIX A: ABOUT THE SAMPLE

233 foundations throughout North America responded to the "2020 State of Philanthropy Tech" survey conducted by the Technology Association of Grantmakers (TAG). Below is an overview of the sample.

**103 community foundations and 58 private independent foundations responded, comprising 69% of all responses in 2020.**
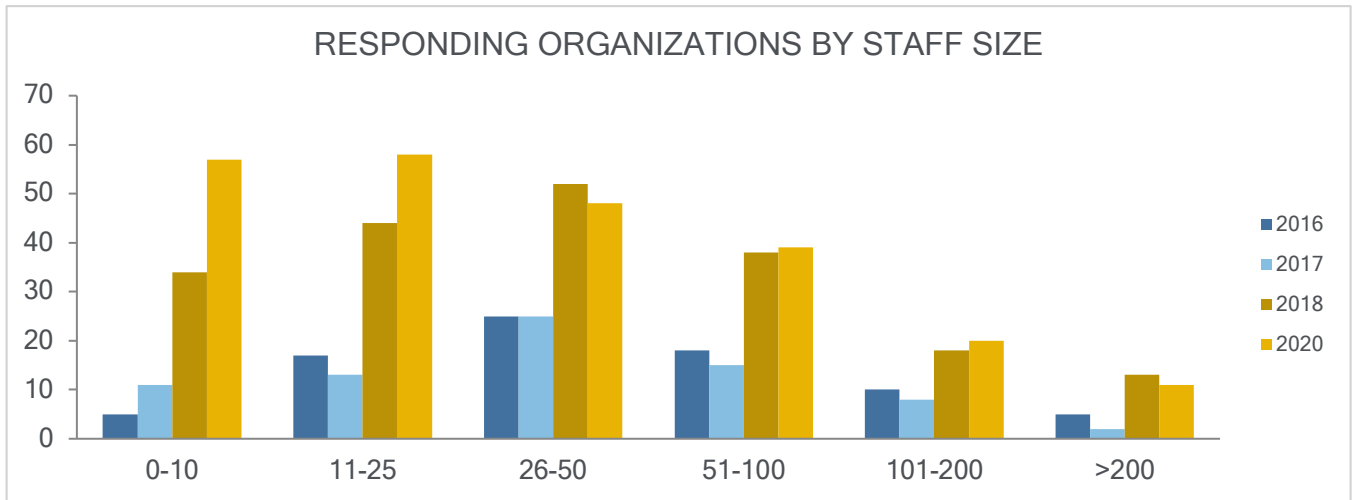


RESPONDING ORGANIZATIONS BY TYPE
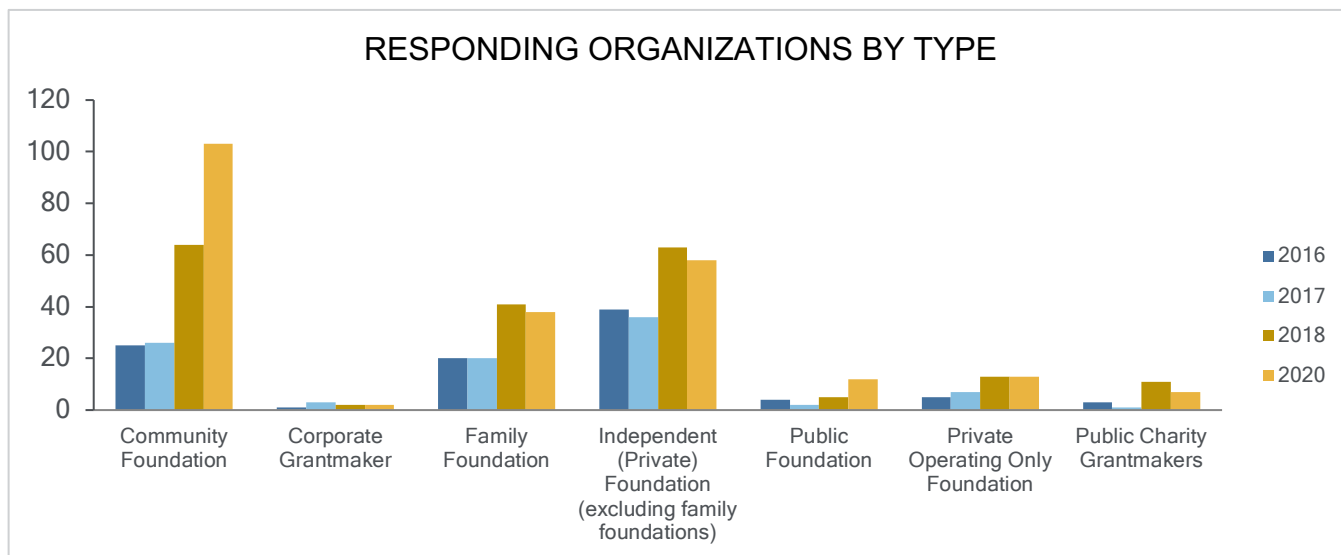
**The 2020 survey was completed by organizations of varying asset size.**

- 30% of responding organizations have assets of over $1 billion.
- 28% of responding organizations have assets between $25 – $250 million.



RESPONDING ORGANIZATIONS BY ASSET SIZE
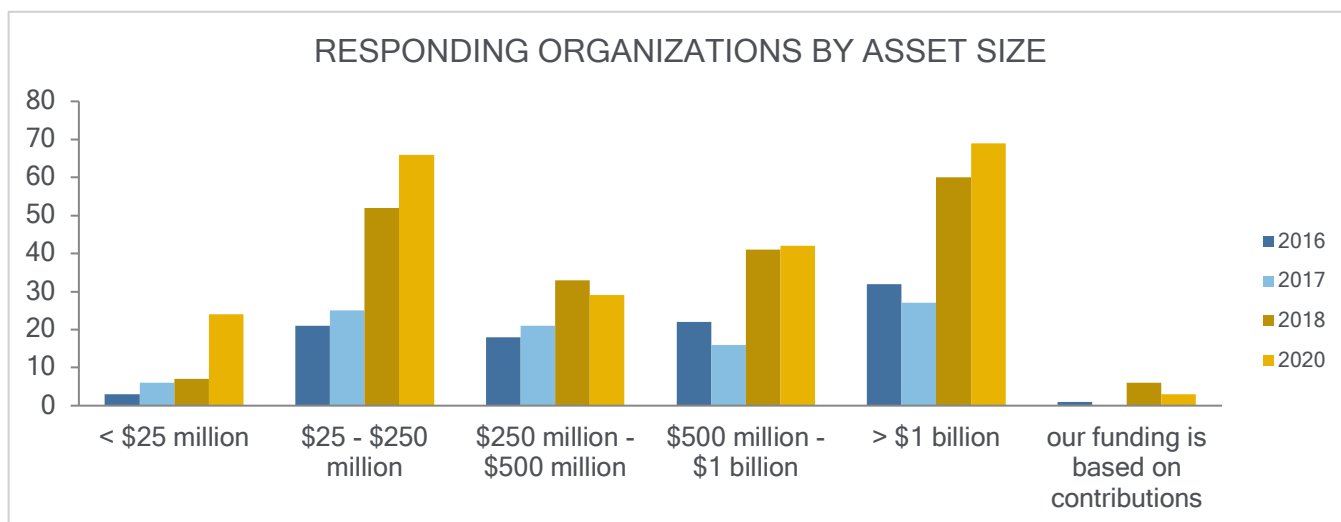
**The 2020 survey was completed by organizations of varying total staff size. 49% of responding organizations employ 25 or fewer people.**

### RESPONDING ORGANIZATIONS BY STAFF SIZE



Legend: 2016, 2017, 2018, 2020

| Staff Size | 2016 | 2017 | 2018 | 2020 |
|---|---|---|---|---|
| 0-10 | 5 | 11 | 34 | 57 |
| 11-25 | 17 | 13 | 44 | 58 |
| 26-50 | 25 | 25 | 52 | 48 |
| 51-100 | 18 | 15 | 38 | 39 |
| 101-200 | 10 | 8 | 18 | 20 |
| >200 | 5 | 2 | 13 | 11 |

# APPENDIX B: KEY FINDINGS AT A GLANCE

**61%** of respondents streamlined grant applications in response to COVID.

**28%** of respondents provided tech training or support for grantees in response to COVID.

**51%** of respondents expect their IT budget to increase in 2021.

**12%** of IT departments have programs to develop a pipeline of diverse leaders.

**22%** of respondents have experienced a security breach in the past two years.

**61%** of respondents carry cybersecurity insurance.

**31%** of respondents fully outsource cybersecurity.

**40%** of IT departments still do not have any DEI programs.

**17:1** continues to be the average ratio of staff to IT staff.

**16:1** is the average ratio of staff to IT staff for community foundations, contrasted with 21:1 in 2018.

**45%** of small foundations at least sometimes involve IT in program strategy.

**25%** of respondents use MS Teams for project management. 29% use no project management tool.

**19%** of respondents use Fluxx for grants management. 14% use a Foundant product.

**12%** of respondents use Salesforce for grants management, double the rate from 2018.

**20%** of community foundations use Foundant Community Suite for their donor portal.

**33%** of respondents use Salesforce for CRM.