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Key Findings From

Harnessing Collaborative Technologies
Helping Funders Work Together Better

Foundations want to collaborate, but it's not easy

More and more, foundations are engaging in collaboration as a way to leverage their impact as they work to address large, complex problems. From learning with peers to identifying new funding partners to developing large-scale, multi-year pooled funding initiatives, many grantmakers believe that by working together they can be more efficient and effective.

Yet, according to research conducted by the Monitor Institute and the Foundation Center, many of these same foundations are struggling with challenges in working together. Among potential obstacles are the time needed to manage the collaborative process and develop protocols for sharing information and taking joint action, as well as difficulties in finding new funding partners. These challenges can ultimately prevent collaborations from moving forward.

New technology can help

Fortunately, a range of new technologies—such as social networking sites, file-sharing tools, crowdsourcing systems, wikis, and almost too many others to name—are making it easier than ever before to communicate and connect. These new tools can make collaborations easier by reducing inefficiencies and enabling new methods of working together that were difficult to imagine just a few years ago.

Project management tools are streamlining the process of aligned action. Communications technologies are making it easier than ever to build relationships and share ideas across organizations and geographies. Matching systems are helping donors and foundations connect more efficiently with organizations and projects. Data visualization tools are helping funders see the bigger picture and make collective, informed decisions.
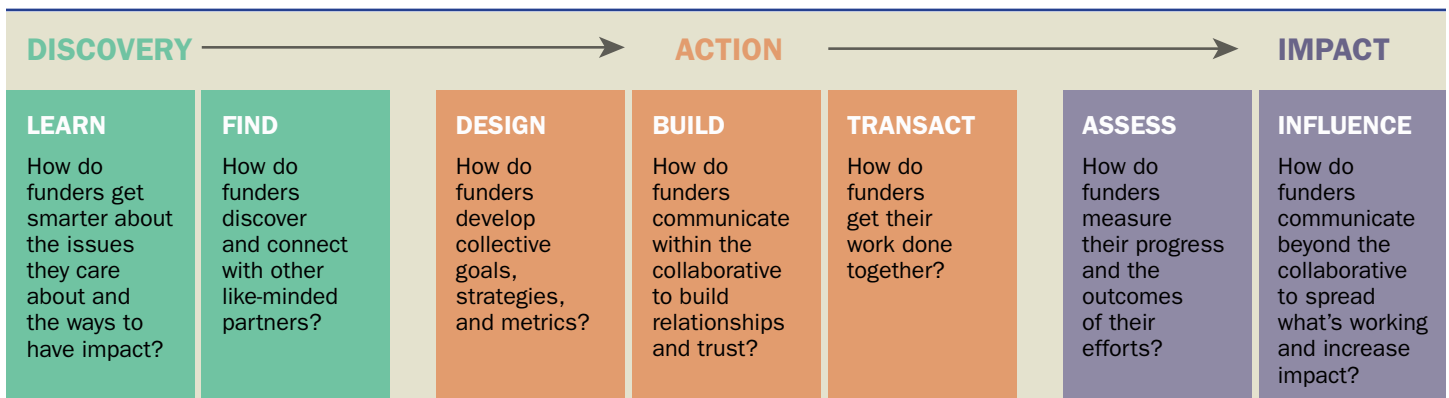
About This Report

Harnessing Collaborative Technologies: Helping Funders Work Together Better was produced through a joint research project of the Monitor Institute and the Foundation Center.

The research included an extensive literature review on collaboration in philanthropy, detailed analysis of trends from a recent Foundation Center survey of the largest U.S. foundations, interviews with 37 leading philanthropy professionals and technology experts, and a review of over 170 online tools.

The report is a story about how new tools are changing the way funders collaborate. It includes three primary sections: an introduction to emerging technologies and the changing context for philanthropic collaboration; an overview of collaborative needs and tools; and recommendations for improving the collaborative technology landscape.

Key Findings From Harnessing Collaborative Technologies: Helping Funders Work Together Better outlines key themes from this research and serves as a companion piece to the full report and a GrantCraft interactive tool finder.

Collaborative Needs

DISCOVERY ⟶ **ACTION** ⟶ **IMPACT**

LEARN	FIND	DESIGN	BUILD	TRANSACT	ASSESS	INFLUENCE
How do funders get smarter about the issues they care about and the ways to have impact?	How do funders discover and connect with other like-minded partners?	How do funders develop collective goals, strategies, and metrics?	How do funders communicate within the collaborative to build relationships and trust?	How do funders get their work done together?	How do funders measure their progress and the outcomes of their efforts?	How do funders communicate beyond the collaborative to spread what's working and increase impact?

COLLABORATION DIAGNOSTICS

IBM Collaboration Assessment Tool — Wilder Collaboration Factors Inventory

COMMUNICATIONS & MEETINGS

GoToMeeting · Conceptboard · pidgin · webex · anymeeting · TelePresence · Adobe Connect · StartMeeting · Y! GROUPS · Blackboard collaborate · Google groups · Blogger · Campfire · twitter · skype · ClickWebinar · YouTube · WordPress.com · GroupBoard.com Advanced online whiteboard software · FUZEBOX · Google Hangouts · HELLO Twiddla · FreeConferenceCall.com · Zip conferencing · join me

COMPREHENSIVE COLLABORATION WORKSPACES

Ubidesk · oogwave · ThoughtFarmer · Microsoft SharePoint · SOSIUS · Socialtext · ZOHO Work·Online · Drupal Commons · fmyi · webex weboffice · jive · kablink OPEN COLLABORATION · huddle · chatter · KARL · wiggio · iCohere

CONFERENCE MANAGEMENT

Lanyrd.com the social conference directory · Eventbrite

CONTENT MANAGEMENT SYSTEMS

Drupal · Joomla! · Plone

Funders don't need to reinvent the wheel

Foundations don't necessarily need a team of consultants and programmers to develop brand-new technology to facilitate their collaborative work. Existing technologies built for more general purposes can often be used to reduce the challenges of working together. From basic online scheduling resources to sophisticated strategy tools and comprehensive knowledge portals, technology exists to address many of the barriers foundations may face when collaborating. The logos surrounding the text of this key findings report give a sense of the range of funder collaboration tools now available.

Start with collaborative needs, not tools

With so many tools to choose from, it's hard to know how to start. But it is important for foundations to begin with the collaborative needs of the group in mind, not with the tools themselves. The Monitor Institute and the Foundation Center have identified three core types of collaborative needs that can be facilitated by technology: discovery, action, and impact.

What follows are descriptions of the challenges inherent in each phase and examples of how technology can support foundation efforts with specific activities in each phase.

Discovery

LEARN: How do funders get smarter about the issues they care about and the ways to have impact?

FIND: How do funders discover and connect with other like-minded partners?

The discovery phase of collaboration includes work that funders do to learn about issues and find partners. This includes activities such as scanning the landscape for information about the state of a field, critical problems, lessons learned, and effective solutions, as well as finding and vetting funding partners, potential grantees, key stakeholders, consultants, and other experts. This phase was cited by funders the project team interviewed as the area where technology could most easily trigger major improvements in current practice.

Funders are looking for forums and trusted filters that can help them make sense of available information, sift through the noise, and pick out the information they need to guide their strategies and activities. Luckily, many online tools already exist to help foundations find, share, and discuss news and information; elevate "hot" content to ensure that important information is easily accessible; gather, index, and disseminate the collective intelligence of the social sector; and create data visualizations to make sense of complex social and economic trends.

Technology tools can also help foundations move beyond low-tech and ad hoc means of finding funding partners, which can be time consuming, inefficient, and limiting in the number of connections that can be made. For example, data visualization tools offer foundations a range of customization options to create maps and charts that reveal patterns of giving and funding relationships. Social networking sites may also provide an important resource for funder collaboratives, especially those that explicitly help funders connect and collaborate more easily.

DATA AGGREGATION, SHARING, & STANDARDS

FOUNDATION DIRECTORY ONLINE · eGrant Reporter · IRIS · GLASSPOCKETS Bringing transparency to the world of philanthropy · NGOsource · GUIDESTAR · GIIRS · CULTURAL DATA PROJECT · foundationconnect · ZOHO CRM · NHI · Success Measures Project · issuelab · SUGARCRM · salesforce · Intuit QuickBase · CHARTING IMPACT · OpenAid Register · TRASI · CHARITY NAVIGATOR Your Guide to Intelligent Giving · FLUXX

DATA ANALYSIS & VISUALIZATION

centrifuge · GAPMINDER · orgnet.com InFlow 3.1 · JUPITERFISH · kaggle · tableau software · GivingData A DATA PLATFORM FOR PHILANTHROPY · PHILANTHROPY IN/SIGHT · CFinder · WASHfunders.org · GoodData · COMMETRIX · Many Eyes · C·IKNOW · The Community Platform · STRATEGY LANDSCAPE™

Action

DESIGN: How do funders develop collective goals, strategies, and metrics?

BUILD: How do funders communicate within the collaborative to build relationships and trust?

TRANSACT: How do funders get their work done together?

One of the biggest ongoing challenges for funder collaboration is how funders work and make decisions together. The action phase of collaboration is about designing strategy, building a sense of community, and transacting business. In this phase, a key challenge for collaborators is the time and energy required for group decision making and action. Virtually every funder interviewed for this project had a story about a negative experience with collaboration based on frustrations with group processes.

Fortunately, many new technology tools have been developed that make the coordination process easier and more efficient across organizations and geographies. Many of these tools have been built for broader markets, like the business sector, but can easily be applied to philanthropy. Group processes may also be streamlined using comprehensive collaboration workspaces. These online workspaces integrate many individual tools for collaborative work, such as document sharing, calendar sharing, blogging, and group discussion boards. They complement face-to-face interaction by providing a platform to sustain activity over time, maintain and extend existing relationships, facilitate dialogue and conversation, expand a network to include others with similar interests, and foster an ongoing sense of community.

Impact

ASSESS: How do funders measure their progress and the outcomes of their efforts?

INFLUENCE: How do funders communicate beyond the collaborative to spread what's working and increase impact?

The impact phase of collaboration is a critical moment for funders to assess collective progress and extend the impact of their work to a broader audience. Funder needs related to impact can often involve the important tasks of gathering and disseminating feedback and other data, as well as the sharing of knowledge broadly with the field. Technology has long played an important role in the collection, analysis, and sharing of data. But the emerging concept of "open data" and the growing capacity of groups to build collective datasets are opening up important new possibilities for aggregating information and sharing it broadly with interested stakeholders.

In years past, activities like disseminating the results of assessments were considered the wrap-up phase of a grant or funding initiative. Increasingly, funder collaboratives are seeking strategies for sharing what they are learning in real time to allow for course correction, knowledge dissemination, and policy change. Social media tools enable iterative conversations to occur throughout the life cycles of funder collaborations. Technology tools can help these funders spread the word about what they have learned and what works in many ways. For example, as the traditional media sector shrinks, blogs have become an important resource for funders to share what they are learning and thinking about and to enable others to find and benefit from that knowledge. Others are creating online communities to share digital resources, as well as information about how those resources are used in diverse environments.

DATA GATHERING

Quora · uservoice · ALL OUR IDEAS · foursquare · geo · YouthTruth · StackExchange · plaxo · GREAT Nonprofits · competiq · SurveyMonkey

DATA ORGANIZING

EVERNOTE · MindView · mindjet · THE BRAIN · MindGenius · mindmeister · Mindomo · delicious

FILE SHARING & COLLABORATIVE WRITING

onehub · Dropbox · DrupalWiki · MediaWiki · Google Drive · box · egnyte · netdocuments · A.nnotate · DokuWiki · EtherPad · Alfresco

FUNDRAISING & MATCHING

foundation REGISTRY i3 · MissionFish · bolstr · CDP · Network for Good · globalgiving · KICKSTARTER · crowdrise · EarlyShares · DonorsChoose.org · Social Impact EXCHANGE · GiveWell · AngelList · click2cause · indiegogo · KIVA · ventureintro

NEWS AGGREGATION

PND Philanthropy News Digest · Flipboard · digg · NEWS.ME · Newsmotion.org

JOINT DECISION MAKING

groupMind express · TeamVoice · deci · thumb · loomeo

INNOVATION MANAGEMENT

Intuit Brainstorm · IdeaScale · learning registry · changemakers · INNOCENTIVE

Tools alone aren't enough to make collaboration happen

Because the field of philanthropy is voluntary and independent by nature, foundations never have to collaborate. But working together can help funders aggregate resources to match the scale of the problems they are seeking to address. And new technologies can significantly decrease the barriers to collaboration when they are used thoughtfully, particularly with lower-intensity forms of working together, like learning networks and aligned funding.

This means choosing and implementing tools that are designed to be as easy as possible to use, integrate seamlessly with existing systems, allow for customization to specific user needs, enable sharing information among numerous potential stakeholders, and carefully balance simplicity and comprehensiveness. It also means considering the "ecosystem" of data, people, and processes that are required to support the technologies, as well as the motivations, policies, and incentives needed to drive their use.

In this way, new technologies represent an important opportunity to make working together easier, alleviating some of the barriers that slow progress and helping provide the infrastructure for a more collaborative and effective philanthropic future.

Get more information

To read a full copy of *Harnessing Collaborative Technologies: Helping Funders Work Together Better*, visit foundationcenter.org/gainknowledge/research/pdf/collab-tech.pdf or monitorinstitute.com/downloads/what-we-think/collaborative-technologies/Harnessing_Collaborative_Technologies.pdf. This report includes extensive listings of tools that are currently available to help facilitate collaborations.

This executive summary, *Key Findings From Harnessing Collaborative Technologies: Helping Funders Work Together Better*, is available at foundationcenter.org/gainknowledge/research/pdf/collab-tech-summary.pdf and monitorinstitute.com/downloads/what-we-think/collaborative-technologies/Harnessing_Collaborative_Technologies_(ExecSummary).pdf.

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Readers can access an interactive resource for identifying tools to facilitate collaboration created by GrantCraft, a joint service of the Foundation Center and the European Foundation Centre, at collaboration.grantcraft.org.
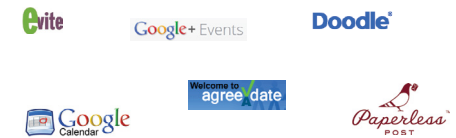
Tweet your thoughts about *Harnessing Collaborative Technologies* using #nptech.

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PROJECT MANAGEMENT

Project · Miradi · Basecamp · Trello · 5pm · asana · tracky · glasscubes · LeanKit Kanban · Teambox · central desktop

SCHEDULING & CALENDAR SHARING

Evite · Google+ Events · Doodle · Google Calendar · agree date · Paperless Post

SOCIAL NETWORKING & ONLINE COMMUNITY

facebook · LinkedIn · Ning · Google+ · Meetup · causes · yammer · Take Part · wiser.org · RE AMP · OpenArchitecture · NationBuilder · jam · idealist.org · care2 · skoll world forum · reddit · Lithium