

THE FUTURE OF PHILANTHROPY:  
TECHNOLOGY INTEGRATION FOR THE PUBLIC GOOD

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The purpose of the study is to understand the influence of technological changes on philanthropic community partners.<sup>1</sup> The scholarly literature on the use of technology by philanthropic organizations is limited. The first objective is to understand the impact of technological innovation on philanthropic organizations as community partners. The second objective is to consider the future work in the philanthropic sector. To achieve these objectives, this research adopted qualitative research methods: informational interviews were conducted with representatives of philanthropic organizations that are integrating technology. Additionally, analysis incorporated organizational profiles, missions, and information about the issues these organizations seek to address. These interviews informed case studies that show five themes. The five key themes for the future of philanthropy are: the role of technology, the irreplaceable human touch, the importance of community, accessibility to data and software, and the promotion of transparency. Finally, based on these themes four recommendations are given for future workers - students and job seekers - looking for opportunities in the philanthropic sector. The contribution of this thesis is providing initial insights on the use of technology by philanthropic organizations, how they envision the future, and what the implications are for emerging philanthropy practitioners.

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<sup>1</sup> In this thesis, philanthropy is defined as “voluntary action for the public good” (Payton & Moody, 2008, p. 27) and the author views this definition to be a broad and affirmative conception of philanthropy. In this thesis, community partner refers to a philanthropic organization that participated in this project as described in the methods and results. While philanthropic and nonprofits organizations are not entirely synonymous, for parsimony these will often be referred to in short-hand as nonprofit organizations (NPOs) since that is how they are commonly known in the U.S.

## TABLE OF CONTENTS

1. INTRODUCTION .....	1
2. LITERATURE REVIEW .....	2
2.1. Technology Changes in the Philanthropic Sector .....	2
2.2. Research on the Use of Technology by NPOs .....	6
2.3. Community-Engaged Research .....	8
2.4. Case Studies.....	15
2.5. Remaining Questions.....	18
3. METHODOLOGY .....	20
3.1. Sample .....	20
3.2. Measures.....	22
3.3. Analysis .....	22
4. RESULTS AND FINDINGS .....	25
4.1. Organizational Overview and Context .....	25
Case Study 1: Asociación Civil por la Igualdad y la Justicia (ACIJ) and Fundación Ambiente y Recursos Naturales (FARN) .....	26
Case Study 2: Apache Software Foundation .....	27
Case Study 3: Make Philanthropy Work .....	27
Case Study 4: Data Foundation .....	28
Case Study 5: Gnome Foundation .....	29
Case Study 6: Big Philanthropy .....	30
Case Study 7: Free Software Foundation .....	30
Case Study 8: Institute for Child, Youth and Family Policy, The Heller School For Social Policy And Management At Brandeis University .....	32
Case Study 9 & 10: Center for Open Science .....	33

4.2.	Envisioned future of philanthropy.....	34
	Theme 1: Integration of Technology and Philanthropy .....	34
	Theme 2: Importance of Human Touch .....	37
	Theme 3: Community.....	38
	Theme 4: Data and Software Accessibility .....	38
	Theme 5: Transparency and Democratization.....	39
4.3.	Recommendations for Philanthropy Students or Job Seekers .....	40
	Recommendation 1: Soft skills.....	42
	Recommendation 2: Philosophy .....	45
	Recommendation 3: Get Started.....	46
	Recommendation 4: Technical and Academic Proficiency.....	47
4.4.	Results Summary.....	48
5.	DISCUSSION .....	51
5.1.	Future of Philanthropy and Recommendations .....	52
	Philanthropic Organizations as Community Partners.....	53
	Students .....	57
5.2.	Limitations and Future Studies.....	57
6.	CONCLUSION .....	59
7.	APPENDICES.....	60
7.1.	Appendix A: Coding List .....	60
8.	REFERENCES .....	64
9.	CURRICULUM VITAE	



## LIST OF TABLES

Table 1. Examples of AI utilization to render missions (Source: Author-created table based on modifications described by Wallace, 2018a and Wallace, 2018b).....	4
Table 2. List of Community Partners .....	21

## LIST OF FIGURES

Figure 1. Concepts Analysis Function of ATLAS.ti Including 10 Imported Interview Data .....	26
Figure 2. An Overview of the Emergent Theme .....	35
Figure 3. An Overview of the Emergent Themes of Recommendations .....	41

## 1. INTRODUCTION

The advancement of technology has inevitably led to various transformations in industrial structures, information accessibility, communication methods, healthcare, and values. These transformations have also had an impact on, and will continue to influence, the philanthropic sector. In their role as community partners, philanthropic organizations can aid researchers in better understanding these changes and their impact on the ways they integrate technology into philanthropic practices. Thus, this community-engaged research project seeks answers to this research question: How are philanthropic community partners engaging technology advances? In particular, this thesis seeks to answer this question by moving beyond social media usage alone into more advanced technologies, such as artificial intelligence, and their innovative potentials within philanthropy.

This study has two primary objectives. The first is to understand the impact of technological innovation on philanthropy, with philanthropic organizations as community partners to inform this understanding. The second is to offer recommendations for students, who need updated information about the implications of evolving technological changes for their future work. Students are thus the primary audience for this thesis project.

## 2. LITERATURE REVIEW

The following literature review has three sections. The first reviews technology changes in the philanthropic sector. The second scopes existing studies in academic sources on philanthropy to summarize what is known about the use of advanced technology by philanthropic and nonprofit organizations. The third pivots from a focus on technologies to consider philanthropic and nonprofit organizations as community partners. Existing scholarship on community-engaged research is then reviewed toward informing the subsequent case study approach of this thesis project.

### ***2.1. Technology Changes in the Philanthropic Sector***

To conduct rigorous research, it is important to refer to credible sources, such as peer-reviewed journals. However, as will be explained further in a subsequent section, the availability of scholarly research on this topic is limited due to the novelty of many of the rapidly evolving changes. While research is underway and more academic publications on this topic are forthcoming, practitioner-oriented sources are also an important supplement to contextualize understanding of newly emerging phenomena (Denney & Tewksbury, 2013; Knopf, 2006). Therefore, in this section, practitioner-oriented sources (e.g., *The Chronicle of Philanthropy*, *Stanford Social Innovation Review*, and GuideStar.org) are summarized, with caution, to describe contemporary changes in emerging technology.

Technology is transforming people's lives, and the philanthropic field is no exception. Technological developments can be both an exciting opportunity and a risk. The organizations and associations in the philanthropic sector have been and will be affected by the technology wave in various ways, such as 1) innovative service delivery to address social and environmental problems, 2) optimizing operations for nonprofit organizations

(NPOs), and 3) The emergence of new challenges for philanthropy and civil society (McNutt et al., 2018).

Nonprofit organizations are incorporating innovative service delivery to address social and environmental issues. Early use of Artificial Intelligence (AI) in nonprofits was as a tool to find new ways to deliver on a charity's mission, one example being the use of machine learning to create new predictive models. Medical research is the most prominent, where datasets and technology partners were available, with a number of nonprofits and philanthropic foundations using AI to develop new methods for early diagnosis and intervention in life-threatening diseases. Early uses of AI in medicine date back to the 1960s, but most papers regarding AI in medical journals are heavily skewed toward the late 2010s and beyond (Siwicki, 2020). In summary, although AI was used early in medical research, AI has great potential in the philanthropic and nonprofit field to improve social and environmental problems.

One area in which AI systems excel is in identifying patterns in "big data," large amounts of user-generated data that can then be used to make predictions. When it comes to philanthropy, it might be possible to apply machine learning to data on existing grantmaking to identify patterns and predictive measures of success that could be used to inform future funding. Examples of AI utilization to enhance missions are shown in Table 1.

Table 1. Examples of AI utilization to render missions (Source: Author-created table based on modifications described by Wallace, 2018a and Wallace, 2018b)

Name of the organization	Activity	A.I. utilization
<b>Artificial intelligence and image recognition</b>		
Refunite	Help families that have been separated by the chaos and confusion of conflict to reconnect by using advanced technology.	Refugees use the service by registering basic information about themselves and the person they wish to find. An algorithm searches for possible matches among the more than 1.1 million people registered in the Refunite system.
Wild Me	Estimate the number of endangered animals and track them.	Created an open-source software platform that combines artificial intelligence and image recognition, to identify and track individual animals.
<b>Automating Repetitive Tasks</b>		
Seattle Against Slavery	To fight sex trafficking, police officers often go undercover and interact with people trying to buy sex online.	Created chatbots designed to disrupt sex trafficking significantly.
<b>Tailoring Services</b>		
Benefits Data Trust	Helps people enroll for government-assistance programs (food stamps and Medicaid).	Using machine learning to adapt its services to clients' needs and turning to data science to predict who might apply successfully on their own to shape outreach efforts.
College Forward	Help first-generation and low-income college students finish their degrees.	Using artificial intelligence to flag coaches when students might be headed for trouble.
Crisis Text Line	Provides free, 24/7, high-quality text-based mental health support and crisis intervention	An algorithm to identify the highest-risk texters, label them "code orange," and move them to the top of the list

Natural Language Processing (NLP) is the application of machine learning systems to the task of interpreting and generating human language. The field is currently experiencing significant growth, and the capabilities of NLP systems have improved dramatically over the past few years; NLP has the potential to bring significant value and change to philanthropy.

Organizations collect data through documents, memos, questionnaires, and forms, but when it comes time to strategize, they may be overwhelmed by the wealth of sources of information and the information they have may be buried in a vast amount of text data. Machine learning and natural language processing (NLP) can uncover previously unseen patterns in data sets through scoring and tagging, automatically discovering patterns such as which salient adjectives people are using in their survey responses. It can uncover previously unseen patterns in a dataset.

In another type of machine learning, the topics generated by Latent Dirichlet Allocation (LDA), which generates a requested number of “topics,” may reflect categories of user interests and concerns. These can form the basis for interest-based user personas that can help improve product, fundraising, or strategic decisions. Automating these specific tasks can also free up staff to do higher-value, more creative work that machines cannot do (Lee & Kinsella, 2020).

In November 2022, the AI company OpenAI launched ChatGPT, an artificial intelligence chatbot, with automated responses. It is recognized that ChatGPT has limitations (Hadley, 2023), such as the lack of information beyond 2021, and the possibility of inaccuracy and bias, which consequently requires human review and editing. Yet there are benefits of using ChatGPT, which only requires editing rather than writing from scratch, and is a great starting point for routine tasks such as drafting fundraising announcements, posting on social networking sites and websites, and so on (Haynes, 2023).<sup>2</sup> Not only can it reduce the workload on fundraising staff, but it may also allow smaller nonprofits to prepare grant applications on par with larger, more sophisticated nonprofits and universities. It may level the playing field and give historically marginalized organizations the resources to compete for funding with the largest and most privileged nonprofits (Hadley, 2023). Although, while described as generative, ChatGPT may not be particularly creative, and thus it is possible that these functionalities may not ultimately benefit nonprofits.

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<sup>2</sup> The author declares that she understands she must be responsible for the creation and interpretation of her work and accountable for its accuracy, integrity, and validity. She further declares that the generation or reporting of results using a generative AI tool is not included in her work. She uses a generative AI tool in order to improve its language and readability.

While NPOs could benefit from AI use in delivering missions and in their operations, the public is apprehensive about the ethical implications of such technology adoption. Regarding safety, AI-driven tools make it easy for actors with malicious intentions to distribute phony fundraising appeals to donors, and credit card fraud might occur (Haynes, 2023). If the NPOs feed information into an AI that is not owned or controlled by themselves, it might raise privacy risks (Childress, 2023; Lee & Kinsella, 2020). NLP algorithms are based on what has been input or “learned” by the machine, therefore, there are risks that the output might be wrong or biased by the information sources fed into it (Haynes, 2023; Lee & Kinsella, 2020). While AI might reduce menial work and potentially release staff to devote more value-added work, a human check is essential to make sure the appropriate human touch remains (Hadley, 2023). To maximize the benefit of using AI, NPOs need AI policies to address multiple aspects, such as employees, volunteers, and vendors’ use of AI, and disclosure of AI usage (Childress, 2023; Hadley, 2023).

## ***2.2. Research on the Use of Technology by NPOs***

In the previous section, the technology used by NPOs, mainly the use of artificial intelligence, was described. The source of the information was from practitioner-oriented sources and non-academic outlets. This section reviews academic sources that address technology use by NPOs. To understand the current state of research on the use of technology by nonprofit organizations, articles were extracted from nonprofit-related journals by using Google Scholar.



The greater part of the literature on technology in philanthropy does not yet thoroughly attend to the use of novel technology by NPOs. There are a few exceptions to this, however many of the existing studies that refer to AI or machine learning are actually integrating these technologies into research use, as tools for methods. Thus, the existing publications that focus on technology integration by nonprofits remain scarce. Nevertheless, the following sections describe the procedures that were used to conduct this literature review.

The scope of the review was artificial intelligence integration by NPOs. First, the literature search was conducted through the use of Google Scholar, and the search criteria were: 1) keywords: artificial intelligence or machine learning, 2) sources: articles published in the *Nonprofit and Voluntary Sector Quarterly*, and 3) time period: 2010-2022. The search strategy and selection criteria yielded 18 articles. Five of them were removed because they were irrelevant. In the remaining 13 research articles, there were no studies on the use of artificial intelligence by NPOs. However, two main points were drawn from these studies. One is the dearth of research regarding the use of technology by NPOs, and the other is attention to the use of social media as the main technology usage that has been studied to date within NPOs. This is notable given the long history of AI described above, though it is possible that people may have recently become aware of AI with the launch of ChatGPT at the end of 2022.

While the use of artificial intelligence by NPOs was explained in the practitioner-oriented sources as described in the previous section, this phenomenon was surprisingly neglected by academic research, thus far. More attention to date has focused on the use of technology as a research tool than curiosity has been lent to understanding it as a

philanthropic tool. Ten out of thirteen articles mentioned the use of technology as a research method: machine learning algorithm (Brandtner, 2021; Enjolras, 2022; LePere-Schloop, 2022; LePere-Schloop et al., 2022), machine reading (Fyall et al., 2018), machine coded (Li et al., 2022), AI-driven tool (Williamson et al., 2021). The remaining three were not used as methods for research. In these instances, AI, machine learning, and big data are mentioned in future research directions (Benjamin et al., 2022), for novice researchers (Schubert et al., 2022), and as a way of facilitating online volunteer contributions (Cox et al., 2018).

No studies were found on whether and how AI is used by NPOs. Yet, two studies of technology being used by NPOs are about social media (and many more exist on this topic, though not typically returned based on a keyword search for AI). For those two studies, one examines how much the audience and reach can be predicted by the use of Facebook (Enjolras, 2022), and the other examines NPOs' emotion-based content strategies on Facebook and public engagement behaviors (Li et al., 2022). Insights from these studies can be beneficial for future research on the use of AI tools in philanthropy since they lay the groundwork for attention to predictive analytics. Nevertheless, a clear dearth of attention to these topics remains, despite the technology having been available for a number of years. Thus, further research is needed to understand how NPOs are using advanced technology, such as artificial intelligence and machine learning.

### ***2.3. Community-Engaged Research***

Shifting gears away from a focus on technology, this section considers philanthropic organizations as community partners. Doing so is steeped within a tradition of community-engaged research. Based on existing scholarship, community-engaged

research (CER) is not a methodology, per se, but a more general “philosophy of inquiry” or an “orientation to inquiry” (Boyd, 2014) that has specific ramifications for the way the process of research is conducted, specifically who is considered the expert. As evidence of the generalities in this philosophical approach to engaging community that supersedes specific methodological techniques, Boyd (2014) mentioned that there is not a great deal of consensus on CER. However, much commonality in methods and norms is nevertheless observed. For example, CER can be referred to as Participatory Action Research (PAR) (e.g., McIntyre, 2008; Smith, 1997), Community-Based Research (CBR) (e.g., Boyd, 2014; Kerstetter, 2012), and Community-Based Participatory Research (CBPR) (e.g., Minkler, 2004; Viswanathan et al., 2004). Though there seems not to be a universally agreed upon acronym for this type of research, there is a great deal of commonality across these terms. Thus, in this thesis, those terms are used in reference to the original source, as a way to respect the multiple disciplinary traditions from which the terms were generated.

Philosophical approaches refer to a general orientation for the how and why of doing research. Some refer to this as methodology, whereas methods can be understood as the specific procedures or techniques implemented to manifest that philosophy of research. It is thus helpful to describe the purposes of research. Generally, the purpose of research is to provide new knowledge, and the philosophy of research assists researchers in designing the research process. One should consider ontological, epistemological, logical, and axiological perspectives when deciding how to conduct and evaluate research.

To further understand research, and from a holistic-comparative standpoint, Smith (1997) categorized research into three forms: positivist (empirical-analytic), interpretive (historical-hermeneutic), and liberatory or critical. Empirical-analytic inquiry (positivistic

approach) is a deterministic philosophy, and its intent is to explain. The positivist ontology is that reality exists and considers facts are facts. Additionally, this philosophical underpinning to research is grounded in a belief that truth can be discovered, and knowledge is conjectural by the scientific method rather than being interpreted. Epistemologically, positivists considered activities that can be observed and experimented upon as those that are worth studying. It aimed to generalize universal laws from a value-neutral stance. The relation between researcher and participant was considered objective and dualistic, and people were the “objects” of the study. The disinterested researcher formed research questions and hypotheses to empirically test deductively (Creswell & Creswell, 2017; McGregor, 2018; Smith, 1997). While historical and not necessarily still present today, this approach informed many modern scientific approaches. However, deductively informed research does not necessarily implement this positivist philosophy literally. Rather, many contemporary approaches to deductive research are less determinative and more probabilistic in being careful to acknowledge limitations on what can be confirmed.

On the opposite end of the philosophical spectrum, the intent of interpretive inquiry is to understand meaning. Interpretivists view reality as existing in people’s minds, or as collectively constructed. This approach sees reality as pluralistic and relative, considering multiple realities that are depending on a person’s perceptions. Truth is created, and knowledge is constructed, by many different people. Therefore, knowledge considered valid in one culture might not be seen as valid in a different culture. Interpretive methods are typically inductive in logic, such that multiple methods of knowing are valued.

Techniques include case studies, content analysis, and discourse analysis, all of which are designed to seek interpretative meaning (McGregor, 2018; Smith, 1997).

While those two prior approaches are often described as polarized, a third philosophy is critical inquiry, which intends to emancipate, and aims to create social transformation in order to redress injustices, support peace and form spaces of democracy. From an ontological perspective for critical inquiry, the reality is shaped by social and historical contexts, including ethnic, cultural, gender, social and political values. As reality is subject to change from concerted human effort, the creation of a new reality is possible. People are able to improve themselves with the knowledge that is obtained through questions that challenge the status quo and existing power systems. As the researcher's values regarding social justice are embedded in the research, objectivity is not possible, nor desirable. Rather, research participants are actively involved in the process of social changes that research creates. Many critical inquiry researchers employ action or participatory research approaches to reflect upon and solve problems (McGregor, 2018; Smith, 1997).

Although the process is not fixed, there are some common steps that are typically involved in an action-based process. These include identifying the problem, building relationships and partnerships, collecting and analyzing data, taking action, and reflecting on the process. Dialectic reflection is an important part of action research, as it allows participants to critically examine their experiences and plan for future action (Smith 1997, Hacker 2017). The critical inquiry process emphasizes collaboration and relationship-building between researchers and participants. Academic researchers and community partners are not in a "being researched" and "doing research" relationship, but are equal

contributors in the process, working collaboratively and sharing their different expertise with the project.

Community-engaged research is a type of critical inquiry. As a related approach, participatory action research is about transforming individuals and society for the liberation of the oppressed (Smith, 1997). Whether overtly political and designed to create immediate change, as in the case of PAR, or about valuing multiple sources of expertise, as in CER, critical inquiries share in common that they seek to challenge traditional research approaches with a singular expert by involving multiple stakeholders, as co-experts. Involving multiple people in the creation of knowledge is valued as an improved means for understanding complex social problems, which require multiple perspectives. It also can have pedagogical benefits for both community partners and students (Boyd, 2014). Thus, community-engaged research can be a type of critical inquiry because it challenges traditional knowledge hierarchies by involving community partners as co-experts.

Based on this research philosophy, community-engaged researchers employ multiple research designs, such as qualitative research methods involving focus groups and intervention research with a quasi-experimental or randomized controlled design (Coughlin & Yoo, 2017). Mixed methods include observations, interviews, surveys, focus groups, and document analysis can be used to collect data (Khan & Fisher, 2013). In summary, a community-engaged research approach is methodologically ambidextrous, as a philosophical approach that can be implemented through many different techniques.

While research involving communities has many benefits, some ethical and practical issues are identified. These include difficulties in achieving a true “community-driven” agenda, insider-outsider tensions, the limitations of “participation;” and issues

involving the sharing, ownership, and use of findings for action (Boyd, 2014; Kerstetter, 2012; Minkler, 2004). Proponents of this approach agree that it is often challenging to implement the philosophical approach in practice, especially due to the increased time-intensiveness to thoroughly engage in community-based relationships. It can also be difficult for students seeking to engage in this type of research to be able to feasibly conduct this kind of research within the timeline of most academic programs, as it takes time to develop and foster relationships. However, part of this issue can be alleviated by moving from a truly community-based approach toward a perhaps more readily implementable goal of community-engaged research. While not entirely community-driven, community-engaged research can retain a similar privileging of community partners as knowledge experts, while also respecting their limited time to participate in every aspect of the research process.

One form of community-engaged research can be the case study method. For example, there are case studies regarding childcare in poor communities in South Africa (Marcus, 2000) and in New York City (Khan & Fisher, 2013). Additionally, Kitzman-Ulrich & Holt (2017) addressed community participatory health promotion in faith-based settings. Plus, Vanleene and colleagues (2018) examined how much citizens are involved in community development in Belgium. In all these examples, a case study approach is utilized as a way to engage community partners in the process of research.

Philanthropy has a history of valuing research designed to inform communities, sometimes referred to as pracademic (practice+academic) research. For example, McCully (2019) defined pracademic research as “intellectually rigorous and systematic studies of actual practices, practical conditions and results, by academically trained and certified

scholars” (McCully, 2019, p. 218), and he suggested that fast-moving technological advancements necessitate pracademic research. Moreover, Baskerville and Wood-Harper (1996) provided a comprehensive overview of the action research methodology applied within the context of information systems development, and philanthropy relies upon updated information. The use of “research to practice” (R2P) has given way to a more productive “research and practice” (R&P) terminology, with researchers and students learning from practitioners and vice versa, a reciprocal influence (Davidson, 2017; McCully, 2019). In summary, taking a community-engaged approach can be useful in philanthropy as it is in broader translational research: data and results that are translated for understanding by the general public.

Specifically, CER can inform an understanding of changes in philanthropy, since community partners drawn from philanthropic practitioners can provide updated expertise on the ways evolutions are occurring. In scholarship, there has been an argument that the dissemination of technology in the nonprofit sector has trailed behind other sectors, however, later findings argue for different conclusions (McNutt, 2020). Philanthropic practitioners can help to settle this academic debate by explaining what the case within the context of their organizations is. Additionally, it is anticipated that technological progress will create options for organizations with limited resources. The impact on people and organizations by technology is inevitable, however, not enough research has been done in this area (McCully, 2019). Plus, the pedagogy aspect of CER also lends itself well to the study of fast-changing technologies in NPOs. For all these reasons, community-engaged research could be helpful for understanding the future of philanthropy.



## *2.4. Case Studies*

Case studies can be a type of community-engaged research. Yet, they are also a particular method in their own right. Before attending to the case study design of this project, this section describes what case studies are and the variety of forms they can have. Several challenges and misinterpretations are considered alongside their community-engaged advantages. Then, a description is provided for how community-engaged research can be integrated into a case study design. Lastly, several examples of case studies in philanthropy are reviewed to inform the design of the current project.

Case study research involves an in-depth investigation of a person, organization, location, event, phenomenon, or another subject of interest. Its purpose is to identify significant patterns and outcomes that can be used to predict future trends, bring hidden issues to light for practical application, and enhance the comprehension of a significant research problem. In the social sciences, the concept of a case study pertains to both an analytical approach and a research design for scrutinizing a problem. Both can be used to generate theories and applications. The analysis techniques for examining a case may include quantitative, qualitative, or mixed, depending on the type of data collected (USC Libraries, n.d.).

Case studies have found applications across various academic fields. For instance, Crowe and colleagues (2011) investigated the utilization of case study approaches within the realm of healthcare. Mills and colleagues (2010) emphasize the integration of case studies in medical practice as a means of enhancing the implementation of treatment guidelines. Robinson and McAdams (2015) similarly employed the case study methodology in the psychology research, specifically focusing on the phase of emerging

adulthood. Just as case studies are applied to prove effective in refining healthcare guidelines, their potential extends to the enhancement of the philanthropic field.

Despite their proven utility across various fields, case studies often face misunderstandings and challenges. Case studies in the social sciences may be perceived as limited in their ability to contribute to creating new knowledge because they are not randomly selected, and the findings may not be generalizable to a larger population. However, they can have utility for transferring skills and information to industry. Despite these advantages, Flyvbjerg (2006) identified five misunderstandings about case-study research. The primary reason for this is the perception that knowledge that is not tied to specific contexts holds greater value compared to practical, context-dependent knowledge. Furthermore, some believe that case studies cannot contribute to scientific development. Third, case studies could be thought useful only for hypothesis generation, which is merely the first step in the research process. In addition, there could be researcher bias in the validation of case studies. Finally, it could be thought to be difficult to summarize and develop general propositions and theories based on specific case studies. Notably, most of these critiques of case studies are derived from positivistic approaches to research, whereas community-engaged research processes value the more context-situated facets of case study approaches.

Additionally, Flyvbjerg (2006) cited Kuhn's (1987) insight that a discipline without a large number of thoroughly executed case studies is a discipline without systematic production of exemplars, and a discipline without exemplars is an ineffective one. In this regard, a greater number of quality case studies can improve a field of study. This, this current thesis project draws from this wisdom in designing a case study approach. The

philosophical intention is to draw upon the insights of critical inquiry by prioritizing the expertise of community partners and using case studies to conduct community-engaged research.

Despite some misconceptions about case studies, as Peattie (2001) (cited by Flyvbjerg, 2006) stated, detailed case studies are more useful to practitioners and more interesting to social theory due to their greater attention to context. Thus, in the current thesis project, case study data collection is utilized to conduct a community-engaged approach, with input from community partners regarding technological integrations. The case study approach is used to develop recommendations for emerging practitioners and students who wish to pursue careers in the philanthropic sector. In these ways, the community developed process of research is honored and integrated throughout the approach of this study on philanthropy.

To further inform the case study approach of the current study, a literature review was conducted to find examples of case studies in philanthropy. In order to specifically gain insights into the utilization of the case study method in research pertaining to nonprofit organizations (NPOs), an inquiry was conducted within the archives of *Nonprofit and Voluntary Sector Quarterly* (NVSQ) and *Voluntas*, two reputable journals in philanthropic and nonprofit studies. The search was centered around keyword scoping for “case study.”

Many of these case studies originated within social movement scholarship and utilize resource mobilization theory as a way to describe how, and to what end, political events occurred, and these are mostly focused on the political institutional context and protest event as the case (e.g., Hua et al. 2016; Sheng 2019). Others investigate how organizations respond to the market institutional context, such as financial crisis or funding

priorities (e.g., Narvaiza et al. 2017), or the market mechanisms affecting individuals within a single organization (e.g., Shaker et al. 2016). In particular, this study draws upon the approaches of Huang (2022), Chenhall et al. (2016) and Noh (2019). The design of the current study draws mostly from those approaches that: focus on organizations as the unit of analysis, recognize organizations to be embedded within both political and market institutional contexts, view organizations to be making uneven adaptations to these contexts, and thus focus on which practices are engaged. Therefore, case study research is understood in this thesis project to be helpful for understanding a relatively novel phenomena – use of artificial intelligence by NPOs – that has not yet been thoroughly researched.

### ***2.5. Remaining Questions***

In summary, the importance of technology is indisputable, and changes are imminent for the philanthropic sector. As observed in the previous sections, it is evident that practitioner-oriented sources have covered the use of AI to enhance operational efficiency to achieve missions, as well as the ethical implications and challenges inherent in AI utilization by NPOs. Contrastingly, scholarly articles in philanthropic and nonprofit studies have predominantly limited their focus on AI to utilization of these tools within the process of research. Studies investigating the incorporation of AI within the NPO sector thus far remain scarce, despite intellectual and practical relevance. Some literature has examined the use of technology by NPOs, but its focus has been limited to the utilization of social networking platforms. Presumably, research on the use of AI will increase, especially with the rapidly increasing attention to AI in the general public. The current

study offers an exploratory step in this direction, ideally prompting further knowledge and new studies.

Therefore, the primary question guiding this research is: How are philanthropic community partners engaging technology advancements? To address this query, the study has two objectives. The first is to examine technological innovation in philanthropic organizations. The second objective builds from the first by then aiming to provide students with recommendations for their future careers in the philanthropic sector based on the impact of evolving technology. As the primary audience is students, the goal of this project is to use case studies to inform about technological innovations in philanthropic organizations.

### 3. METHODOLOGY

The current project involved community-engaged critical inquiry through case studies. Data for the case studies were generated primarily from informational interviews with representatives of philanthropic organizations that are integrating technology. Organizational representatives were invited to participate in a brief informational interview in order to learn about whether and how their organization was transforming traditional philanthropic practices through the use of technology. This primary data was supplemented with content analysis of information available about these organizations online, including their websites, missions, profiles, and about the issues these organizations are seeking to address.

#### *3.1. Sample*

Organizations were selected for inclusion if they met these three criteria: (1) a 501(c)3 status nonprofit entity or directly serve nonprofit organizations (e.g., as a nonprofit consultant); (2) engage in philanthropic activities, such as fundraising, grantmaking, grant writing, volunteer coordination, resource/service provision to the general public at free or reduced cost; and (3) involve technology within the ways their organization is working to transform the future of philanthropy (e.g., open source software provision, AI in fundraising solicitations, garnering resources to make data open access). Additionally, a small number of cases were identified through snowball sampling: when participating organizational representatives recommended another relevant organization or representative.

The IRB protocol was approved prior to conducting interviews. Recruitment occurred by email. The author invited identified potential community partners to

participate in an informational interview for 15–20 minutes. The informed consent described the intention of this research project to use the real names of organizations, rather than pseudonyms, in order to increase the potential for students to learn about these actual organizations, and to provide credit to the content creators. In this way, community partners were invited to be active agents in the construction and sharing of knowledge, rather than passive subjects of research. If community partners agreed to participate as a named organization, informational interviews were hosted online through a video conferencing platform.

A semi-structured questionnaire was used to ensure all community partners were asked comparable questions. To enhance learning, the interviews were not audio or video recorded. The interviewer composed notes during the interview to record responses. The 10 participating community partners are listed in Table 2.

*Table 2. List of Community Partners*

#	Community Partner Organizations
1	Asociación Civil por la Igualdad y la Justicia (ACIJ) and Fundación Ambiente y Recursos Naturales (FARN)
2	Apache Software Foundation
3	Make Philanthropy Work
4	Data Foundation
5	Gnome Foundation
6	Big Philanthropy
7	Free Software Foundation
8	Institute for Child, Youth and Family Policy, The Heller School For Social Policy and Management, Brandeis University
9	Center for Open Science: Community Partner 1
10	Center for Open Science: Community Partner 2

### ***3.2. Measures***

The interviews encompassed a series of questions that probed into various aspects of the interviewed organizations. The inquiry delved into the organization's mission, focusing on its fundamental purpose and objectives. Additionally, the interviews explored the organization's mission such as a current primary target problem or need that it aims to address. The role of technology within the organization was a key area of investigation, aiming to understand the extent to which technology is integrated into its operations.

The interview process also extended to capturing the community partners' perspectives on the future trajectory of philanthropy. This encompassed their visions and anticipations for how philanthropy would evolve in the coming years, potentially shaped by technological advancements and changing societal needs. The interviews concluded by seeking recommendations from the community partners. Specifically, insights were gathered regarding the desired skill sets and competencies that students should possess to align with the evolving demands of the philanthropic sector.

### ***3.3. Analysis***

The case study data was analyzed and is presented as narrative descriptions of each organization. Additionally, the envisioned future of philanthropy and recommendations for students were qualitatively coded using Computer Assisted Qualitative Data Analysis Software (CAQDAS) to find common themes across cases. Specifically, these data were analyzed in ATLAS.ti.

Each case study began with a description of the organization and its use of technology. In order to understand how technology is used in each organization, the data obtained was presented with an overview of the organization, its target issues, and a



description of the organization's use of technology. Next, their envisioned future of philanthropy and recommendations for students were presented. The methods to analyze data involved identifying common themes, unique insights, and areas of disagreement, focusing particularly on the use of technology in organizations.

To create codes, there are two types of coding: deductive coding, in which a tentative "start list" of codes is developed prior to data collection, and inductive coding, which emerges gradually during data collection (Miles et al., 2014, p. 81). This study used inductive coding to explore commonalities from the data.

The coding process unfolded in two cycles. The first cycle employed descriptive coding, which summarizes the basic topic of a passage of qualitative data in a word or short phrase (Miles et al., 2014, p. 74). Interview notes were read line by line to find as many ideas for themes and patterns as possible. In the second cycle, the data was reorganized around the key concepts and ideas by grouping them into categories or themes (Miles et al., 2014, p. 87). Tactics to generate meaning were used to draw validation conclusions (Miles et al., 2014, pp. 277–293). Categories were judged by two criteria: first, internal homogeneity, which concerns the extent to which data in a category are organized in a meaningful way; and second, external heterogeneity, which concerns the degree to which differences between categories are bold and distinct (Patton, 2002).

For the first cycle coding, 47 codes were created, and 55 quotations were coded for Future of Philanthropy; 39 codes were created, and 68 quotations were coded for Recommendations. Codes were created with FoP for the topic of Future of Philanthropy at the beginning of the code to identify the topic, and RMD for Recommendation. See Appendix A: List of codings for a comprehensive description of each code. Affective

methods - Emotion coding (Miles et al., 2014, p. 75) were initially created. In the course of my research on organizations, it was challenging to determine the relevance of personal emotions and how to integrate this code into the final conclusions. Therefore, the Emotion codes were not utilized in the analysis. Nevertheless, the need for further investigation was recognized, as these data may have the potential to answer certain research questions.

In the second cycle, the codes were grouped into categories and themes to extract key concepts and ideas; after the second cycle, the writing phase still required modifications. Allocating a lot of codes in one sentence was not working well for clustering, as it resulted in the repetition of the same content. For example, “Human touch” and “Ask questions, communication” were often covered, and “Recommendation” had to be re-categorized because of the repetition of the same content. In summary, through a systematic approach to qualitative interpretive techniques, case studies were analyzed for collective themes, and critical inquiry was implemented through the process of engaging community partners in the knowledge construction process to inform recommendations for emerging philanthropic studies students.

## 4. RESULTS AND FINDINGS

In this results section, the analysis is divided into three parts. First, the case study organizations are described using information obtained from interviews. Second, an envisioned future of philanthropy for each of the five emergent themes are described. Finally, recommendations for students and job seekers seeking opportunities to work in the philanthropic sector are given for each of the four themes.

Figure 1 was created through the Concepts Analysis function of ATLAS.ti that included 10 imported interview data. Words such as Technology, Skills, Community, and People were emphasized in the relative size of the words displayed, based on their frequency count.

### ***4.1. Organizational Overview and Context***

In this section, ten case studies are presented. Each study provides an overview of the organization and outlines the targeted issues. Most of the material came from the website and information shared during the interview. All the information described in this section is attributed to the organizations named below. This is followed by the use of technology within these organizations.



to strengthen legal safeguards and enhance government efficacy, ultimately benefiting the entire community.

Both ACIJ and FARN leverage technology to further their mission. A notable use of tech within these groups was the establishment of an online learning platform. To address rights violations, they launched a digital platform to educate Argentinians about the constitution and environmental law. This online resource not only made education more affordable but also broadened its reach.

### **Case Study 2: Apache Software Foundation**

Apache Software Foundation (ASF) is a philanthropic organization that provides software for the public good. The organization does this by providing services and aid for software project communities that participate in ASF activities. The primary problem that the organization is currently targeting is the issue of companies taking control of all of its software. To combat this problem, ASF is working to create an open and fair network that would allow for volunteer software collaboration, rather than a software monopoly.

Technology is the heart of Apache Software Foundation. ASF primarily focuses on providing open-source technology that is cutting edge and always evolving. This innovation, which ASF brings to technology, draws volunteers to ASF and builds community. The community of volunteers that surround technology in this organization allows for productive collaboration, making the software development sustainable as well as beneficial for those using it.

### **Case Study 3: Make Philanthropy Work**

The organization specializes in enhancing fundraising programs through a collaborative approach. They merge proven strategies with digital innovations to create

tailored solutions for engaging sophisticated donors and adapting to changing philanthropic trends. Their services include crafting unique, long-term fundraising strategies that address specific challenges, recommending a custom mix of tactics, and partnering with nonprofit groups and educational institutions to generate significant fundraising growth. The organization has transformed through diversifying its team's expertise, offering innovative, relationship-driven strategies, and aims to connect loyal donors with impactful missions for future success.

The artificial intelligence that Make Philanthropy Work uses operates as a highly functional sales representative. The AI can appear as an employee and converse with donors using an email template that is similar to a Mad Lib by filling in the email template with specific details that pertain to the individual donors. AI is the intermediary between two live human beings as they make a connection to a potential donor and then pass them off to a real-life sales representative.

#### **Case Study 4: Data Foundation**

The Data Foundation is an organization that is on a mission to improve government, business, and society through open data. The Data Foundation researches data that they can use to then educate policymakers in order to help aid in their decision making. The type of work that the organization does includes research, advocacy, drafting legislation, and education about the importance of standardized data and evidence. The primary need that the Data Foundation is currently targeting is open data. The foundation strives to educate the public about the importance of standardized data so that data from multiple sources can be cross-examined and made available to the public. Data Foundation encourages open data to promote transparency between the government, businesses, and society.

While the role of technology in the Data Foundation is not paramount, it is still a necessary tool in conducting operations. The Data Foundation relies on cloud-based technology to work and share information. There is also a need for statistical programs in order to filter through data, surveys, etc. when compiling and producing open-source data.

### **Case Study 5: Gnome Foundation**

The GNOME Foundation is a non-profit organization with a mission to provide a free and open-source desktop user interface (UI) for Linux-based operating systems, emphasizing improved usability and accessibility. Their overarching goal is to empower individuals with trustworthy technology, fostering a diverse and sustainable ecosystem for free software personal computing. In pursuit of this mission, the GNOME Foundation is focused on enhancing its UI to attract a wider range of contributors and users. Their efforts target key areas that are accessibility, performance, and functionality. Initiatives like the Google Summer of Code program are employed to draw in contributors, including students and designers. Proficiency in open-source technology, coding languages, and soft skills like collaboration and online interaction are deemed essential for these organizational representatives.

The organization's core revolves around technology, engaging developers, designers, and UI specialists who heavily rely on varied technological platforms including issue trackers, communication tools, and mailing lists. These platforms facilitate collaboration, coordination, and idea exchange, serving as the backbone of the organization's functioning. Global connectivity is a key benefit, enabling effective cooperation and the collection of user feedback for refining software in areas like user experience, security, maintenance, and distribution.

### **Case Study 6: Big Philanthropy**

Big Philanthropy has a specific and focused niche within the philanthropy sector. Their primary concentration lies in assisting individuals in devising and conducting conversations that yield the highest possible fundraising outcomes for their respective organizations. They aid organizational leaders in acquiring the skills to solicit donations effectively. Their role involves equipping respective organizations with the necessary language and tools to proficiently craft philanthropic requests.

This system functions as a conversational AI tool, simulating fundraising conversations through Call Simulator technology. Call Simulator, a prominent provider of training for 911 operators, underlies this simulation process, recreating various scenarios including restaurant meetings with background noise. This immersive approach facilitates practice in soliciting funds. Notably, the system excels in employing pre-composed solicitation language, enabling the transition from individualized training to instructing fundraising techniques using Call Simulator. The narrator, in collaboration with their business partner, initiated Call Simulator's development, driven by their technological interests and prior experience with IBM Watson for nonprofit applications. This innovative approach distinguishes itself from organizations using AI to optimize fundraising through generic email responses, as it emulates complete conversations. The narrator's training platform, encompassing videos and AI chat characters, extends to Call Simulator, fostering enriched interaction and skill enhancement.

### **Case Study 7: Free Software Foundation**

Free Software Foundation's global reach extends to followers and members across the world. Their mission is to champion computer user freedom in today's tech-saturated



existence, be it in homes, schools, or businesses. As advocates of the free software movement, they firmly believe in seizing control over technology, ensuring software empowers rather than dominates. They lead the charge by fostering, promoting, and utilizing free software – software that upholds essential rights: to run, copy, study, modify, and share. Through targeted campaigns, they combat threats like Digital Restriction Management and software patents, tackling root causes of societal challenges. Their dedicated licensing department further reinforces their commitment to free software's advancement.

Technology plays a significant role as they advocate for the rights of technology users. However, it's important to note that numerous social and political issues also come into play. Therefore, it's not the sole role at hand. Their use of technology is extensive, and one instance of the free software they utilize is Big Blue Button - a video conferencing tool. The conference incorporates a variety of technologies, with their tech team streaming the entire event through OBS. Moreover, they engage in free chats on IRC, a chat network on Libera Chat, which facilitates communication with all participants. To align with their mission, everything they are utilizing, such as their summer program, consists of free software. The browser they use is a free software service. When editing videos, they employ K Live - a free software for video editing. Furthermore, they edit images using free software like GIMP and Inkscape. In essence, the utilization of free software permeates throughout.

## **Case Study 8: Institute for Child, Youth and Family Policy, The Heller School For Social Policy And Management At Brandeis University**

The institute operates at the intersection of data and policy, aiming to provide equity tools through concrete products like the Child Opportunity Index and a conceptual Policy Equity Analysis framework. Their mission involves equipping organizations with data tools and frameworks for equitable decision-making. The Child Opportunity Index addresses a gap in connecting structural health factors to opportunity access. Unlike typical measures, it avoids blending race and ethnicity, allowing analysis of segregation's origins. The Diversity Data Kids project, akin to the Index, exposes the impact of structural racism on children's well-being. The organization emphasizes accessibility, serving a diverse user base including advocates, researchers, and governments. The Index incorporates adaptable factors, enhancing its policy influence. Their map app visualizes opportunity disparities without community bias. On the policy front, they redirect discussions toward equity, showcasing how inclusive policies can reduce childhood poverty. The institute melds data-driven insights with equity-focused policy frameworks.

The institute's operations rely on technology like national data sources, including the American Community Survey, and data on air quality. They've established a data pipeline for the Child Opportunity Index (COI), skillfully managing and organizing data for accessibility. The COI functions as both a data product and a technology pipeline, offering a digital framework for data handling. Virtual Zoom meetings aid in coaching and interpreting results for community organizations. The technology facilitates around 1000 monthly email interactions, with the communications team providing tailored responses. Collaborations like integrating COI into the Children's Hospital Association's data

repository have led to impactful publications. Data analysis employs tools like Stata, Python, and R, alongside dedicated computers and servers. The map app utilizes Hyper Object's visualization technology, diversifying their technological approach.

### **Case Study 9 & 10: Center for Open Science**

The organization emphasizes the importance of openness and reproducibility in scholarly work, highlighting that credible claims are built on transparent evidence and processes. Enhancing these values in science boosts knowledge quality and accessibility. This entails sharing research content and procedures, facilitating replication and inclusive collaboration. They discuss efforts to shift research culture, aligning incentives and policies with openness. It envisions a system where research content and processes are accessible within ethical bounds, promoting improved reproducibility. The main goal is to align incentives and shape policies in research. Efforts target institutions, funders, and publishers for policy changes. The approach is systemic, ensuring harmonized incentives across all components.

They discuss their efforts to incentivize researchers to share findings earlier in the research process. They offer technological solutions, Open Science Framework (OSF), to facilitate practices like registering research protocols in advance. Ultimately, they strive for greater value from research by promoting early exposure and collaboration, valuing research that might not fit traditional publication criteria. They view technology as a means to unlock the hidden potential of research and drive positive change in scientific research practices.

Internally, the organization relies on a suite of tools including Zoom, Google Workspace, and the OSF to maintain connectivity among distributed teams and manage

projects efficiently, embodying the open science practices they promote. Through these efforts, they aim to not only advance scientific research practices but also ensure their own operations reflect the principles of openness and transparency they advocate for.

#### ***4.2. Envisioned future of philanthropy***

To find the common theme regarding the envisioned future of philanthropy, codes were grouped, and five themes emerged. Figure 2 presents an overview of the emergent themes in the model, and Appendix A presents the coding list.

##### **Theme 1: Integration of Technology and Philanthropy**

*I consider myself a philanthropist in technology, working for a cause I deeply care about.*

*(Case Study 5:6 ¶ 27)*

##### ***Data in Philanthropy***

The integration of technology into philanthropy is revolutionizing data analysis. With machine-readable data, AI offers profound insights that foster evidence-based research and decisions. This emphasis on technology and data mandates funders to elevate their contributions, ensuring the availability of data services, a skilled technical team, and robust computational infrastructure. A significant trend in philanthropy is the creation of data infrastructures to link the public with the vast volumes of data generated. Organizations focus their infrastructure and data-related endeavors on public welfare. Furthermore, by sharing this data, donors can pinpoint and address gaps in charitable contributions, optimizing resource allocation.

Figure 2. An Overview of the Emergent Theme



### *Organization and Tech Integration*

Philanthropic entities are increasingly considering AI tools, such as ChatGPT, to refine their operations. Although some of these tools are still in the exploration phase, their potential is undeniable. The synergy between philanthropy and technology is becoming more evident. By harnessing technological tools, mundane tasks can be automated, providing more time for meaningful activities. IT solutions are becoming integral in this realm, primarily to enhance donor relations, thereby fostering a culture of continued support.

### *The Role of Online Platforms*

The proliferation of online platforms, mobile applications, and crowdfunding campaigns has made philanthropy more accessible and transparent. While the majority of interactions are transitioning online, concerns related to security and trust may be receding. Additionally, the adoption of advanced technologies like blockchain, which infuses an additional layer of trust, accountability, and traceability, could benefit the philanthropic ecosystem, ensuring transparency and credibility.

### *The Landscape of Opportunity*

Opportunities are constantly growing, presenting chances to create meaningful impact. Yet, the increasing amount of information can be challenging; organizations have to keep up with new technology to be able to prevent hacking, data breaches, and generally to protect privacy of donors and other philanthropic constituents. Alternatively, technology can advance innovation and progress that, if understood and meaningfully engaged, can empower organizations to tackle social issues at their core, potentially benefiting more

people. As a result, some view themselves as tech-philanthropists, dedicated to causes they are passionate about through technology use.

## **Theme 2: Importance of Human Touch**

*If you go into ChatGPT and you want to write us something, it's gonna generate volumes of stuff. That has no soul. (Case Study 6:3 ¶ 36)*

### *Human Touch in Organizational Engagement*

In the age of advanced technology, tools like ChatGPT can generate vast amounts of data rapidly. However, these often lack the personal touch and “soul” intrinsic to human expression. While technology offers efficiency, it can’t replace the genuine interactions and conversations that individuals crave for a meaningful existence. In the non-profit sector, while software like Salesforce optimizes tasks, it’s genuine human interactions that foster deep connections with donors and continuously drive support. Authentic one-on-one connections, marked by genuine conversations, dictate the success of a non-profit. Although technology can manage vast donor tasks efficiently, major and transformational gifts require a more personalized approach. The key is to harness technology where it’s efficient and integrate human emotions where they bring the most value, building profound donor relationships.

### *Navigating Sensitive Conversations*

On the topic of sensitive conversations, issues like race and racism often lead to “nervous conversations.” People fear causing unintentional offense or being misunderstood, hindering open discussions on racial and ethnic equity. These hesitations, rooted in the very issues they aim to tackle, are further compounded by societal apprehensions of these topics being viewed as excessively political. The challenges of navigating these discussions also

stem from a lack of diversity experience and exposure to the adversities faced by diverse groups. To address this, a blend of education and philanthropy can be pivotal. Philanthropic efforts can provide training and frameworks, making these essential conversations more accessible and approachable, thus fostering understanding and change.

### **Theme 3: Community**

*We collaborate worldwide because free software thrives thanks to a lot of volunteers. (Case Study 7:7 ¶ 48)*

The importance of volunteers, community, and collaboration was noted in the various organizations that support the development of free software. Free software is firmly rooted in global collaboration, leveraging the talents and time of volunteers around the world. This spirit of collaboration reflects the core freedom of free software: the ability to research, modify, and openly share code. The driving force behind these efforts is a vast network of volunteers. From code to advocacy, their contributions are the lifeblood of the movement. One of the most striking characteristics of this community is its inherent curiosity. Their efforts demonstrate once again that the success and growth of free software is a testament to the power of volunteer-led global cooperation.

### **Theme 4: Data and Software Accessibility**

*We believe that by increasing openness, democratizing access, and making information more widely available, we can generate greater value. (Case Study 9:5 ¶ 62)*

#### *Data Accessibility*

By making information publicly available, donors could use data analytics to identify donation gaps and see where help is needed and where too much is being provided. The greater value can be created by increasing openness, democratizing access, and making



information more widely available. Yet, this can also impose a significant burden on donors to comprehend and prioritize materials. The role of the data intermediary is to package various data sources into easily digestible metrics. Organizing large amounts of information can be a daunting task, but in the midst of these challenges lies the opportunity for innovation and exciting progress. By fostering greater openness, we can unleash and facilitate significant progress.

### *Software Accessibility*

True societal advancement is often thought in democratic society to hinge on freedom – and in a technologically driven society, this value can translate to user freedom to access needed software. The philosophy behind free software aligns with many ideals in philanthropy. Both seek to promote human welfare, and in today’s digital age, welfare extends to unrestricted access to software tools. Proprietary software, with its inherent constraints, can inadvertently perpetuate social issues. As philanthropic organizations look toward the future, software accessibility can become a greater part of philanthropy, ensuring every individual’s digital needs are met. Yet, this freedom also comes with the need to provide certain safeguards, such as protecting user privacy.

## **Theme 5: Transparency and Democratization**

*With the abundance of online platforms, crowdfunding, and mobile apps, engaging in charitable endeavors has become more accessible and transparent. (Case Study 7:7 ¶ 48)*

### *Democratization*

Technology is a catalyst for the democratization of philanthropy, aiming to usher in a more inclusive and universally accessible era. The push towards openness and broadening access ensures that information becomes more universally available, fostering

an environment where everyone can participate and derive value. By viewing every undertaking, especially infrastructure and data-related initiatives, as an integral contribution to the greater public good, the overarching goal is to evolve philanthropy from a limited endeavor to a widespread public benefit.

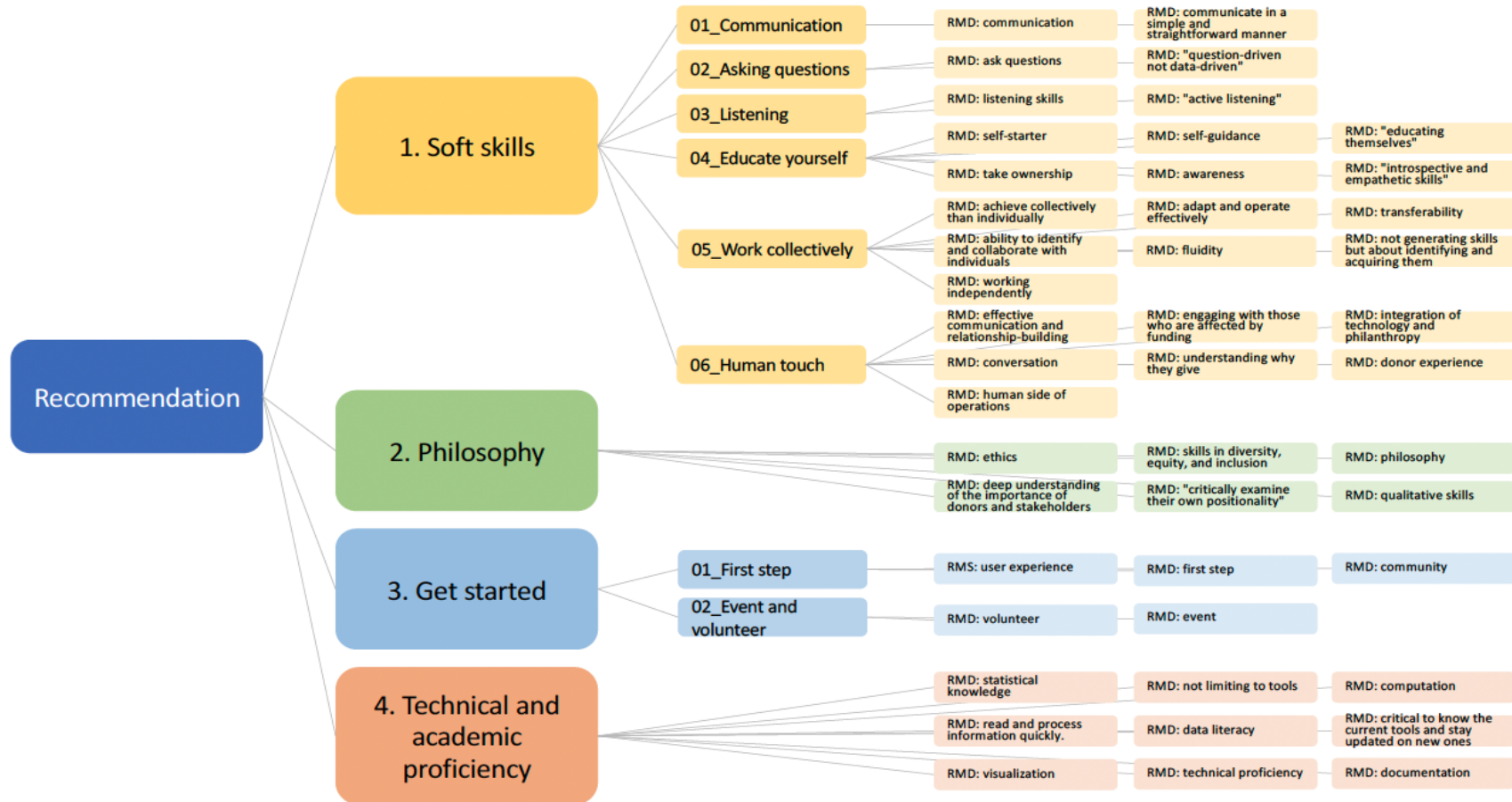
### *Transparency*

In the modern age, with the proliferation of online platforms, crowdfunding initiatives, and mobile applications, charitable engagement has transformed into an open book, allowing for unparalleled transparency. Such transparency is not just a passive attribute; it actively empowers individuals, granting them the ability to become philanthropists and agents of change in areas they're passionate about. Advanced technologies like blockchain further amplify this transparency by offering enhanced trust, accountability, and traceability, all of which are invaluable to the philanthropic sector. Furthermore, the efficiency gained through streamlined data and comprehensive reporting from grantees means that the process of analyzing this data and determining impact becomes significantly more efficient.

### ***4.3. Recommendations for Philanthropy Students or Job Seekers***

To find commonalities regarding recommendations for students or job seekers who seek to engage with the philanthropic sector, codes were grouped, and four themes emerged. Figure 3 presents an overview of the emergent recommendations in the model. Appendix A includes the coding list.

Figure 3. An Overview of the Emergent Themes of Recommendations



## **Recommendation 1: Soft skills**

*For students who want to join such organizations but don't know where to start, the key is to ask questions. People within the organization are usually willing to help and answer any queries newcomers may have. Taking the initiative to communicate is essential. (Case Study 5:14 ¶ 34)*

Technology is transforming how philanthropic organizations operate. However, for those who wish to excel in the field of philanthropy, soft skills remain essential. In fact, technology has heightened the importance of soft skills for those passionate about philanthropy and eager to advance their careers. These skills are crucial for understanding the motivations and reasons people give and for working effectively in the sector. Moreover, in a technology-driven world, soft skills become even more vital for adding value and excelling in one's profession.

### *Communication*

Effective communication is a vital soft skill. In an organization that mostly operates in the online environment, where language barriers and diverse perspectives are common, the ability to express ideas in simple and straightforward terms is essential. For newcomers, asking questions and initiating communication are key steps to getting started and integrating into the organization. Furthermore, the importance of individuals who can facilitate communication between historically marginalized populations and people with disabilities is emphasized, highlighting the significance of inclusivity. Active listening and engaging in meaningful conversations are equally crucial for both interpersonal interactions and designing technology that aligns with real-world needs.

### *Ask Questions*

The importance of asking the right questions cannot be overstated. As one representative stated, organizations should strive to be *question-driven* rather than solely *data-driven*. This mindset shift emphasizes the significance of crafting thoughtful inquiries that delve into the heart of the matter. For students aspiring to join such organizations, the art of asking questions is equally vital. It is not only about seeking information; it is also about understanding the perspective of a person or purpose of a cause. Fundraising and building connections revolve around knowing individuals deeply—what shapes them, what motivates them, and what propels their actions. It is the skillful deployment of these questions that transforms raw data into a meaningful narrative, enabling organizations to make informed decisions and foster genuine connections. In the journey of personal and organizational growth, the power lies not only in data but in the questions that unlock its true potential. In summary, organizations need to be question-driven, not only data driven.

### *Listening*

Active listening is a crucial skill in the context of philanthropy. Understanding the wishes of donors and connecting them to causes they care about hinges on effective listening. Whether it is for interpersonal interactions or designing technologies, the ability to engage in qualitative methods and actively listen remains highly valuable in ensuring that actions reflect reality and solutions resonate with the people they aim to serve.

### *Educate Yourself*

Self-education is a paramount skill. It encompasses not only staying informed about the issues at hand but also delving into introspective and empathetic skills to better connect with the communities one seeks to serve. Self-guidance is vital for success, especially when

philanthropic practitioners often have the opportunity and responsibility to define their own career path. Being a self-starter and taking ownership of initiatives are key recommendations for those aspiring to work in philanthropy. In essence, to make a meaningful impact, one must be proactive in their pursuit of knowledge and self-development while also demonstrating the initiative and responsibility to lead and effect positive change.

### *Work Collectively*

In a dynamic landscape, success often hinges on one's ability to work collectively and harness the strengths of others. It is not only about personal growth, but rather about recognizing the value of identifying and collaborating with individuals who possess the skills the organization need. Building ecosystems or teams allows the organizations to achieve more collectively than being done individually. The key is adaptability and the capacity to operate effectively within a fluid environment, where roles are interchangeable and part of a larger system. Embracing the concept of transferability is vital in this context. Whether working in small groups or independently, the ability to thrive collectively is paramount for success in this philanthropic ever-evolving world.

### *Human Touch*

As noted in Theme 2 of the Future of Philanthropy, the importance of the human touch in philanthropy is likely to deepen even further, despite the fact that technological developments are changing the way NPOs operate. The ability to engage in conversations with individuals and actively listen to them is immensely valuable, whether in interpersonal interactions or when developing quantitative studies that accurately depict reality, or when designing technologies. In grantmaking, it is essential to engage with those impacted by

funding and have a dialogue with them regarding the decision-making process since they are the individuals ultimately affected by an organization's decisions. No matter how much technology develops, it is important to be able to respond with a human touch.

### **Recommendation 2: Philosophy**

*Having skills in diversity, equity, and inclusion is crucial. Students should undergo training on how to have difficult conversations, overcome nervousness, and critically examine their own positionality in influencing their perspectives and actions. Developing introspective and empathetic skills is essential to truly understand and incorporate feedback from the communities they serve. (Case Study 8:16 ¶ 63)*

While the importance of technology is recognized, a deep understanding of the ethics and philosophies that drive philanthropic organizations is necessary. In the realm of ethics, individuals must grasp the organization's functioning, roles, and responsibilities, all while adhering to ethical guidelines to ensure the well-being of the community they serve. Equally crucial is recognizing the significance of donors and stakeholders in any field. The real complexity lies in the ideological perspective behind it. The philosophy of philanthropy delves into the intricate ideological underpinnings, encompassing an equitable perspective. This philosophical foundation takes precedence over technological skills, reminding us that the tools we use are secondary to how we employ them. To excel in philanthropy, aspiring students are encouraged to explore their chosen area extensively and incorporate diversity, equity, and inclusion skills. Training in conducting difficult conversations, managing nervousness, and critically assessing personal biases is equally essential for effective philanthropic endeavors.

### **Recommendation 3: Get Started**

*Once they get into it, they will find it easy to navigate further, become comfortable, and succeed. It's all about taking the first step. (Case Study 5:17 ¶ 38)*

#### *First Step*

Taking the first step provides an excellent opportunity to gain a foundational understanding of how an organization operates. Once students immerse themselves in that realm, further navigation becomes simpler, more comfortable, and more successful. The first step is crucial.

Regardless of their background in technology, if they have an interest in User Interface (UI) design, there are tools available that allow them to design app screens without any coding. If they are interested in UI design and user experience, organizations are keen to nurture those skills. Organizations are eager to impart knowledge to those interested. Working for organizations is an ideal environment to acquire practical knowledge by engaging in projects. Students are encouraged to begin their journey, exploring various projects, and learning from the experiences of others. Organizations welcome individuals from all backgrounds to join, learn, and contribute.

#### *Event and Volunteer Opportunities*

Organizations regularly hold conferences and events, offering numerous opportunities for networking and learning. A great starting point would be to attend these events. For those unable to participate in physical events, there are also online sessions and workshops. These gatherings provide invaluable chances to acquire knowledge and share insights with peers. Students can also stay updated by subscribing to the newsletter. Additionally, organizations often require volunteers to assist in organizing these events,



aiding in the coordination process, and fostering a sense of community. If students are interested in contributing to meetings and events, this can be a way to create a connection with the organizations.

#### **Recommendation 4: Technical and Academic Proficiency**

*A recommended marketable skill that students need for updated workforce activities is to be data literate. (Case Study 4:5 ¶ 7)*

Whether familiar with Salesforce Customer Relationship Management (CRM) or AI tools, students can never learn too much about technology. It is important to know about current tools and stay up to date on new ones. It is especially beneficial for those with a technical background to understand technology-related aspects such as marketing strategies and technical analysis.

To excel in one's work, one must also be able to read and process vast amounts of information quickly. This skill is extremely important when one has to read through a large amount of information and create summaries. Also recommended as marketable skills that students need for modern workforce activities are data literacy and the statistical knowledge necessary to draw conclusions from data. Appropriate documentation and visualization skills are also essential to understand and effectively contribute to the project.

However, as mentioned above, it is emphasized that the importance of communication and human touch outweighs computational and technical proficiency. While it can be beneficial to learn Python – a widely used programming language for data analysis and predictive analytics based on artificial intelligence and machine learning algorithms – this philanthropy practitioner advised against feeling pressured to learn it only due to believing it would lead to a job in philanthropy. Rather than get caught up in

potential technological fads, it is important to limit oneself to only those tools that support potential for growth and success.

#### ***4.4. Results Summary***

This results section describes three elements. First, each organization's profile, mission, and targeted challenges and how they use technology in their organizations are described. Second, an envisioned future of philanthropy for each of the five emergent themes is described. Finally, four sets of recommendations are presented for students and job seekers looking for opportunities to work in the philanthropic sector.

The first section provides an overview of each organization, its mission and targeted issues, and its use of technology. One organization recommended establishing democracy and promoting sustainable growth through policies and laws. Other organizations promoted open data, open science, and free software. Some organizations support fundraising and work as data intermediary organizations. Regarding the use of technology, there were two types of technology: technology used to carry out the mission and technology used to streamline and improve operations within the organization. Examples of technology used to accomplish the mission include the use of AI to streamline fundraising and the use of AI for training to develop fundraisers. There are also examples of online training being provided for targeted beneficiaries and technology for training technicians to promote free software. Technology provides a platform to promote the principles of open science, for example. Technologies used for internal operations include online communication tools for day-to-day operations, software for managing donations, stakeholders, and project management. Some organizations consistently use free software

to maintain alignment with their organizational philosophies, while others use platforms provided by their own organizations for internal management.

Second, the future of philanthropy is framed around five themes: the integration of technology, the importance of human touch, community, data and software accessibility, and transparency and democratization. The merging of technology with philanthropy unlocks opportunities for both entities and individuals. This results in enhanced transparency, efficient operations through AI, and allows organizations to focus on core missions and nurture donor relationships. Despite technological advancements, the human element remains paramount. Genuine interactions deepen relationships and emphasize the irreplaceable value of human emotions in philanthropy. The success of free software is attributed to worldwide collaboration and the dedication of volunteers, emphasizing the important role of the community. Open data is crucial for effective philanthropic strategies. Prioritizing free software, devoid of proprietary limitations, aligns with the philanthropic goal of creating an inclusive digital landscape. In addition, online platforms further democratize and clarify philanthropic endeavors.

Lastly, four recommendations for students or job seekers who seek to engage with the philanthropic sector were: soft skills, philosophy, get started, and technical and academic proficiency. When working in the philanthropy industry, soft skills, especially communication and active listening, are essential, with an emphasis on meaningful questioning and continuous self-learning. Understanding the philosophical ideas that underpin the implementation of philanthropy, such as the importance of mission, donors, and equity, is key. Despite technological advances, understanding the underlying philosophy remains important. The best way to get started in philanthropy is to take the

first step and support organizations in which you have a genuine interest. Participating in events provides valuable learning opportunities, and volunteering deepens your connection to the community. While having up-to-date technical knowledge is helpful for modern philanthropy, a balance of tech skills and soft skills is important for overall success.

## 5. DISCUSSION

In summary, this thesis first queried existing scholarship, and the literature review revealed a dearth of existing attention thus far to the use of artificial intelligence within philanthropic and nonprofit organizations. Nevertheless, practitioner-oriented sources indicate the current relevance and likely forthcoming academic research. As an initial step toward developing more research on this topic, this thesis project utilized a case study approach to engage community partners. As a result, this these contributes a highlighting of three key aspects of philanthropy that are affected by technological developments. First, it detailed the profiles of various organizations, their mission, and their incorporation of technology. It described organizations that advocate for democracy, emphasize open data, and incorporate AI into mission execution and internal operations. This contributes to students better understanding the variety of ways even this small sample of organizations engage AI within their philanthropic practices.

Second, this thesis contributed five key themes for the future of philanthropy: the role of technology, the irreplaceable human touch, the importance of community, accessibility to data and software, and the promotion of transparency. While technological innovation is streamlining operations, human connections and the transparency of data and processes are at the heart of philanthropy. These insights can inform students and emerging philanthropic professionals regarding the remaining importance of soft skills, even within and perhaps especially because of, technological developments.

Lastly, for those who aspire to a career in philanthropy, the last section advised recommendations related to the importance of soft skills, understanding the philosophy behind philanthropy, the nature of true involvement, and the balance between technical

know-how and interpersonal skills. This section contributed more practical tips for how to reason from the evidence shared in this thesis toward integrating lessons learned into philanthropy. Admittedly, the case study approach of this thesis limits the availability of representative data from a larger sample, yet the variety of approaches undertaken by even this small sample of cases underscores the need for emerging philanthropic practitioners to be aware of trends and remain flexible in their adaptations.

### ***5.1. Future of Philanthropy and Recommendations***

As mentioned in the literature review section, a number of articles were found regarding technology use by NPOs in practitioner-oriented sources, such as in the *Chronicle of Philanthropy* and *Stanford Social Innovation Review (SSIR)*. However, little was yet found in the academic research literature on the use of technology by NPOs. This is an area for growth in future studies, as academic research needs to attend to contemporary trends, especially the disruptive impact of advanced technologies.

The current project sought to understand the influence of technological changes on philanthropic community partners. Through case studies of community partners in nonprofit organizations and their technology use, this project aimed to understand how advanced technologies - such as AI and machine learning - are used in these NPOs, how these community partners envision the future of philanthropy, and what recommendations community partners offer for students and job seekers who are keen to seek career paths in the philanthropic sector. This section discusses the implications for the future of philanthropy and the future of philanthropic work for students.

## **Philanthropic Organizations as Community Partners**

### *Adapting Technology by Philanthropic Organizations*

In regard to the technological adoption by philanthropic organizations, the findings indicate that community partners are leveraging diverse technological applications to bolster the execution of their missions and enhance the operational efficiency within their entities, consequent to technological advancements.

As noted in the literature review, practitioner-oriented sources presented many examples of the use of AI and data by NPOs. Community partners recognized the use and democratization of data, the use of AI to streamline fundraising, and the use of AI for training to develop fundraisers. There are also examples of online training being provided for targeted beneficiaries and technology to train technicians to disseminate free software. There are also examples of technology being offered as a platform to promote the principles of open science. Despite the efforts made by NPOs to enhance equality of access to data and software, it is crucial to remember that a digital divide still exists in the United States concerning sustainability of access (Gonzales, 2016).

Following the introduction of generative AI services, such as ChatGPT, there was notable coverage in the media discussing both the utilization and ethical implications of such technology. One of the interesting findings is that while some instances demonstrated the use of AI in enhancing the efficiency of fundraising activities, organizations remain apprehensive. Some are still debating the practicality of generative AI integration and continue to prioritize human operators, especially for stakeholder-related operations. This is particularly salient due to the inherent nature of the philanthropic sector, where a personal touch is vital. As highlighted in the Future of Philanthropy and Recommendations

section above, while AI can augment efficiency to a certain degree, it often necessitates human validation.

Another important finding is that, in order to accomplish their mission, organizations seek to maximize the use of technology to impact the industry ecosystem itself. These organizations use these technologies internally to align with the society they want to create and the mission they want to achieve. By using the same platforms and software they advocate, these organizations not only ensure transparency in their operations but also strengthen their credibility in the eyes of their stakeholders.

The results of this study showed that data-informed organizations underscore the role of technology in harnessing insights from data, with tools like Stata, Python, and R signifying a shift towards a more data-centric approach in decision-making and strategy. As many sectors undergo a transitional phase, there's a push for modernizing research methods. Despite the continued use of traditional research and dissemination, the growing integration of technology introduces novel avenues for collaboration, transparency, and community involvement.

This result may be explained by the fact that the diverse ways in which these organizations incorporate technology signal a larger trend of digital transformation across sectors. From harnessing AI to boost donor engagement to leveraging cloud-based tools for efficient operations, these case studies offer a glimpse into the evolving relationship between organizations and technology. As technology continues to evolve, it will be imperative for organizations to adapt, innovate, and find new ways to achieve their missions while staying true to their core values.



### *Envisioned Future of Philanthropy by Philanthropic Organizations*

One of the aims of this study was to understand how philanthropic organizations envision the future of philanthropy. In the previous results section, there were five emergent themes: the integration of technology, the importance of human touch, community, data and software accessibility, and transparency in democratization.

The results of this study showed that the integration of technology and philanthropy is ubiquitous, despite the ethical concerns raised by the rapid development of AI and various technologies, the community partners perceived that the integration of philanthropy and technology will have a positive impact on philanthropy. For example, it can facilitate evidence-based research and decision making, automate tedious tasks, and allocate resources to more meaningful activities such as strengthening stakeholder relationships. In addition, the adoption of advanced technologies such as blockchain that enhance trust, accountability, and traceability will benefit the entire philanthropic ecosystem, ensuring transparency and credibility, among other things. While the positive impacts of these technologies are acknowledged, it is equally important to recognize the associated risks. These risks encompass securing against data theft and hacking, as well as addressing ethical issues related to data, including data privacy.

One of the other interesting findings was that despite technological developments, human intervention remains important. While technology offers efficiency, it cannot replace the personal touch and soul inherent in genuine interaction, conversation, and human expression that individuals crave for a meaningful existence. Fostering deep connections with stakeholders and promoting genuine human interaction will determine the success of nonprofit organizations. When it comes to sensitive conversations, issues

like race and racism often lead to “nervous conversations.” People’s fear of being unintentionally offended or misunderstood prevents open discussion of racial and ethnic equity. Challenges in advancing these discussions also stem from a lack of exposure to the experiences of diversity and the adversities faced by diverse groups. The ability to engage in substantive discussions will be critical in the philanthropic sector in the future. The integration of education and philanthropy is critical to making these essential discussions more accessible and approachable, and to promoting understanding and change.

Finally, one of the key findings of the future of philanthropy is democratization and transparency. Technology is the catalyst for the democratization of philanthropy, and the promise of a more inclusive, universally accessible age is on the horizon. By viewing infrastructure and data-related initiatives as integral contributions to the larger public good, philanthropy could evolve from a limited endeavor to a broad public good. Transparency would empower individuals to become active philanthropists, rather than merely passive attributes, enabling them to become agents of change in areas they are passionate about.

One possible reason for this finding that philanthropic organizations prioritize the human touch over AI is that human connection and empathy are essential to their mission. The complex nature of social problems often requires nuanced human understanding. There are also concerns about trust, ethics, and understanding local conditions. In many organizations, technology is seen as a complementary tool, not a replacement for human intervention. The human element is seen as irreplaceable in fostering trust, providing comprehensive solutions, and navigating the complex challenges of social change.

## **Students**

As shown, technological developments have changed the way organizations achieve their missions and the way they operate within their organizations. In the face of such changes, the aforementioned findings provide insight into the kind of people who will be needed in the philanthropy industry in the future. One of the most important findings is that the key skills in philanthropy are soft skills, not technology skills. While many organizations acknowledge the importance of technology, they also describe the importance of communication skills, self-study, and active listening. This is an important point that seems to be underattended to as of yet in existing publications discussing the impact and importance of technology.

While both traditional and digital media channels were embedded in the daily practices and routines of nonprofit organizations (Pirtle & Maxwell, 2022), there should be more educational opportunities for skill sets in light of digital literacy available to develop these skills (Janin & Burlingame, 2022). Therefore, I agree that rather than spending time learning about technology, it would be better to spend time understanding the philosophy that underpins and is incorporated into the mission while being a student.

### ***5.2. Limitations and Future Studies***

Cited by Flyvbjerg (2006), Kuhn (1987) offered the insight that a discipline without a large number of case studies is a discipline without the creation of systematic exemplars, and a discipline without exemplars is an inefficient discipline. It was suggested that the situation in the social sciences could be rectified by more and better case studies. By providing initial insights into how philanthropic organizations are using technology, how they envision the future of philanthropy, and recommendations for students and job seekers

in the philanthropic sector, where technological developments are inevitable, this study contributed to the construction of new knowledge.

The sample in this study is small, yet it contributes toward greater understanding regarding NPO use of technology. As Mills and colleagues (2010) demonstrate that case studies can be effective in improving medical guidelines, further case studies need to be conducted to strengthen the understanding of the technology use and eventually perhaps develop philanthropic guidelines or a set of best practices.

Moreover, McCully (2019) notes that fast-changing technological advances include community in philanthropy and asserts that pracademic research by engaged scholars is needed. The pedagogical aspects of community-engaged research also lend themselves to the study of fast-changing technologies in philanthropic nonprofit organizations. Researchers and students learn from practitioners, and vice versa, and influence each other (Davidson, 2017; McCully, 2019). Thus, this thesis contributes new understanding by way of philanthropic exemplars. To develop a full picture of technology use by philanthropic organizations, additional studies will be needed.

## 6. CONCLUSION

This project investigated how philanthropic and nonprofit organizations utilized and integrated technologies into their missions and organizational practices. While the existing literature identified the use of technology as a methodology in philanthropy research, research on the use of technology by philanthropic organizations was limited. This study contributed to understanding the use of technology and toward building knowledge about the future of philanthropy. However, this study has some limitations, notably the sample is small and likely not broadly representative. This limitation can be addressed in the future by engaging additional community partners. In summary, this project utilized the tools of community-engaged research and philosophy of critical inquiry to present a series of case studies with community partners. Themes were identified for the future of philanthropy, and recommendations were offered to students.

## 7. APPENDICES

### 7.1. Appendix A: Coding List

	Number of codes
<b>Future of Philanthropy</b>	<b>47</b>
<b>1. Integration of technology and philanthropy</b>	<b>14</b>
01. Data	
FoP: AI for data analysis	
FoP: computation	
FoP: data and philanthropy	
FoP: data driven	
FoP: Identify gap	
02_ Organizaion	
FoP: AI for operation	
FoP: leverage technology to handle tasks	
03_ Online platform	
FoP: online platform	
FoP: Security	
FoP: trust	
04_ Opportunity	
FoP: new possibilities and opportunities to make a difference	
FoP: opportunity for innovation	
FoP: organization empowerment	
FoP: philanthropist	
<b>2. Human touch</b>	<b>13</b>
01_ Value adding	
FoP: “no soul”	
FoP: “personal narrative”	
FoP: communication	
FoP: connection	
FoP: conversation	
FoP: engaging donor	
FoP: relationship between donors and organization	
FoP: technology for volumes of donors	
FoP: value adding	
02_ Sensitive conversation	
FoP: “nervous conversations”	
FoP: barrier	
FoP: culture	

	FoP: role of education	
3. Community		5
	FoP: collaboration	
	FoP: community	
	FoP: curiosity	
	FoP: globalism	
	FoP: volunteer	
4.Data and software accessibility		10
	01_Data accessibility	
	FoP: data accessibility	
	FoP: open source	
	FoP: role of data intermediary	
	FoP: value proposition	
	02_Software accessibility	
	FoP: “achieve human welfare if people are free”	
	FoP: “computer user freedom”	
	FoP: free software	
	FoP: proprietary software	
	FoP: software and philanthropy	
	FoP: software needs	
5. Transparency and democratization		4
	01_Democratization	
	FoP: democratization	
	FoP: public good	
	02_Transparency	
	FoP: efficiency	
	FoP: transparency	
6. Other		1
	FoP: the anticipated impact of geopolitics on funding arrangements	

Recommendations		39
1. Soft skills		24
	01_Communication	
	RMD: communicate in a simple and straightforward manner	
	RMD: communication	
	02_Asking questions	
	RMD: “question-driven not data-driven”	

	RMD: ask questions	
	03_Listening	
	RMD: “active listening”	
	RMD: listening skills	
	04_Educate yourself	
	RMD: “educating themselves”	
	RMD: “introspective and empathetic skills”	
	RMD: awareness	
	RMD: self-guidance	
	RMD: self-starter	
	RMD: take ownership	
	05_Work collectively	
	RMD: ability to identify and collaborate with individuals	
	RMD: achieve collectively than individually	
	RMD: adapt and operate effectively	
	RMD: fluidity	
	RMD: not generating skills but about identifying and acquiring them	
	RMD: transferability	
	RMD: working independently	
	06_Human touch	
	RMD: development skill	
	RMD: distinguishing themselves from others	
	RMD: problem solving	
	RMD: soft skill	
	RMD: start working early	
	2. Philosophy	6
	RMD: “critically examine their own positionality”	
	RMD: deep understanding of the importance of donors and stakeholders	
	RMD: ethics	
	RMD: philosophy	
	RMD: qualitative skills	
	RMD: skills in diversity, equity, and inclusion	
	3. Get started	5
	01_First step	
	RMD: community	
	RMD: first step	
	RMS: user experience	
	02_Event and volunteer	
	RMD: event	



		RMD: volunteer	
		<b>4. Technical and academic proficiency</b>	<b>4</b>
		RMD: free software by government	
		RMD: role of student	
		RMD: role of underrepresented groups	
		RMD: role of university	

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## 9. CURRICULUM VITAE

Arisa Miyakozawa

### **Provide Research and Develop Strategies to Lead Innovation for Public Good**

Strong academic background in holistic management of social impact covering community development and its evaluation and reporting for community investment with an MBA in Finance and an MA in Philanthropy. Proven expertise in diverse interpersonal communication, collaborating closely with both internal and external management teams to drive high-impact advancements. Exhibit strong patience and tolerance with empathetic leadership in navigating complex tasks and projects. Enthusiastic and optimistic learner with high intellectual curiosity in community development striving to pursue new capital flow and create social impact with future-mindedness.

### **PROFESSIONAL EXPERIENCE**

#### **LOCAL INITIATIVES SUPPORT CORPORATION (LISC)**

**Indianapolis, IN**

**2022 to 2023**

*The nation's largest community development support corporation that has 38 local offices.*

#### **Graduate Assistantship from Indiana University - Indianapolis**

As a Loan team, involved in loan Intake, Request for Program Action (RPA). And as Sustainable Community team, involved in Grate Place and Quality of Life (QoL) project

#### **Key Results:**

- ◆ Managed the Certified Plan project and performed financial modeling by analyzing estimate of implementation of Certified Plan and communicate with City government to obtain the information to support local community organization.
- ◆ Developed Intakes and performed financial analysis for potential loan borrowers.
- ◆ Researched MBE/WBE/VBE/DOBE developers for inclusive racial equity.

#### **SOCIAL IMPACT MANAGEMENT INITIATIVE (SIMI)**

**Tokyo, Japan**

**2021 to 2023**

*Tokyo-based non-profit organization for social impact measurement and management (IMM).*

#### **Impact Analyst Training Program Coordinator**

Planned and managed IMM training program to financial institutions in Japan.

#### **Key Results:**

- ◆ By using grant from The Japan Foundation, designed and managed the IMM training program.
- ◆ Designed evaluation and conducted surveys and interviews to develop and report recommendations to improve the program.

#### **Global Research Center Research Fellow**

Conduct research in areas of social impact measurement and management to promote IMM concepts in Japan.

#### **Key Results:**

- ◆ As a research fellow of Global Resource Center, I contributed to the creation of materials on global impact measurement and management trends.
- ◆ To promote concepts of IMM in Japan, I contributed translation of IMM terminologies to create common language for integration of business and impact management.

**GLIN IMPACT CAPITAL - Tokyo, Japan**

**2021 to 2022**

*Tokyo-based first of its kind late-stage impact and ESG investing venture capital fund.*

**Pro Bono**

Providing pro bono in the areas of marketing and consulting for impact investing fund in Japan.

**Key Results:**

- ◆ Acquired transferable skills related to grant management by investing in social enterprises to enhance their value addition
- ◆ Contributed to the creation of a fund's website.
- ◆ Supporting to publish articles to promote corporate mission and to fundraise.

**INDIANA UNIVERSITY LILLY FAMILY SCHOOL OF PHILANTHROPY**

**Indianapolis, IN.**

**2020 to 2021**

*Indiana-based research institution for philanthropy.*

**Auxiliary Aid**

- ◆ Supported to explain visual items, such as graphs or maps for visually impaired master's student enrolled in Civil Society in Comparative Perspective course during Fall 2022 semester.

**Research Assistant**

- ◆ Contributed data collection of 3 organizations for PhD Candidate for her Case Study project.

**Visiting Research Associate.**

- ◆ Contributed philanthropic organization case study profile for Donor Advised Fund (DAF) recipient research project to understand thoughts of respective players in DAF field and to provide solutions for better utilization of donation and organizational relationship with donors, DAF sponsors, and recipient.
- ◆ Contributed research data organization for COVID-19 donation tracking project.
- ◆ Supported first tier peer reviewed journal review process for better quality publication.

**SOCIAL INNOVATION AND INVESTMENT FOUNDATION (SIIF)**

**Tokyo, Japan**

**2020 to 2021**

*Tokyo based Thinktank, which provides policy advocacy and manages impact investing fund to promote social market development to tackle pressing social issues through innovative capital flow solutions.*

**Contract researcher.**

Provide research for social impact investing market development to boost up impact capital flow for supporting organizations that tackle social issues in Japan.

**Key Results:**

- ◆ Provided research for Cabinet Office of Japan to contribute foreign case study research of capital provision and to advise better utilization of dormant account.

- ◆ Provided research for Cabinet Office of Japan about UK and US's science policy to promote impact investing field to create innovative capital flow to science policy procedure.
- ◆ Conducted UK impact investing policy research for policy advocacy and support the Roundtable conducted by Finance Service Agency and National Advisory Board of Impact Investing Japan.

**KIBOW IMPACT INVESTING FOUNDATION — Tokyo, Japan      2020 to 2020**

*Tokyo based impact investing fund, which provides investments to social entrepreneurs that tackle pressing social issues.*

**Pro Bono.**

Provide case study research of entrepreneurs that address social issues stemmed from COVID-19 crisis.

**Key Results:**

- ◆ Conducted case study research on counter COVID-19 innovation to promote innovative ideas to social entrepreneurs to boost their novel business model.
- ◆ Spoke about impact on labor market by COVID crisis and innovation cases to tackle social issues stemmed from the crisis at KIBOW Counter-COVID Online Pitch on August 24th, 2020

**SAGAMORE INSTITUTE — Indianapolis, IN, United States      2019 to 2020**

*Indiana based Thinktank, which provides policy advocacy, Citizenship education and Impact investing to improve communities and citizens through faith based solutions.*

**Pro Bono.**

Conduct market research to increase awareness of key stakeholders in Indiana impact investing ecosystem to boost up impact capital flow for supporting organizations that tackle social issues.

**Key Results:**

- ◆ Influence Indiana impact investing market development through awareness improvement by providing summarized reports regarding to respective actors in Indiana.
- ◆ Produce reports regarding to policies related to impact investing market development to promote policy advocacy.

**HLS GLOBAL LTD — Indianapolis, IN, United States      2019 to 2019**

*Public accounting firm to provide audit, tax, advisory to Japanese companies in the US.*

**Tax paraprofessional.**

Support to file corporate income tax return and individual tax return for Japanese companies and individuals in the US.

**Key Results:**

- ◆ Supported US corporate income tax return through creating Trial Balance bridge, Workpaper preparation and journal entry and data entry to Go System (Tax return IT system).
- ◆ Supported companies, which are subsidiaries of Japanese company and operate in the US, and their employees from Japan for their global tax requirement.

**STORM RESEARCH LTD — Burton-on-Trent, United Kingdom      2015 to 2017**  
*Independent investment consulting service provided globally to institutional investors.*

**Equity Research Analyst.**

Researched and published equity research reports in English on Japanese mid-cap and small-cap stocks to provide investment consulting to non-Japanese speaking institutional investors.

**Key Results:**

- ◆ As an independent sell-side equity research analyst, published equity research report to support clients' financial performance.
- ◆ Created and updated financial models focusing on accuracy, thoughtfulness and consistent formatting.
- ◆ Conducted quarterly meetings with Investor Relations or corporate management of listed companies to obtain information to identify business growth drivers for the company, and updated KPIs.
- ◆ Acted as a liaison between team members to optimize efficiency of collecting and updating quarterly earning data, corporate strategy, market structure and economic news to improve research quality.
- ◆ By using Bloomberg, conducted screening to identify new investment opportunities, analyzed corporate organizational and financial data and obtained industrial news updates.
- ◆ Developed and maintained research relationships including company managements, industry contacts, government and authorities.
- ◆ Performed fundamental analysis on listed companies and analysis of industry structures and competitive dynamics to gain more investment opportunities for investors.
- ◆ Presented new investment recommendation ideas and summarized corporate, industrial and economic news to financial advisors and equity analysts to increase team's commercial awareness.

**CATERPILLAR FINANCIAL SERVICES — Tokyo, Japan      2003 to 2011**  
*Captive finance company for Caterpillar Inc., providing financial solutions by various range of financial products. Head Quarter (HQ) located in Nashville, TN.*

**Special IT Project – Subject matter expert, 2007-2011**

Conducted the global IT financial system deployment project as a financial business expert representing Japan. Succeeded in business process optimization and cost reduction. Established solutions to many complex unsolved operational issues using strong data interpretation skills, which improved cost efficiency of the company. Noted for ability to collaboratively engage peer and take leadership for stakeholders from divisions across the company to identify opportunities to save resources and increase profitability by taking on challenging projects with significant outcomes. Based in Tokyo and Nashville to build effective communication and relationship with internal and external stakeholders to lead success of the IT system deployment project with cross-functional leadership.

**Key Results:**

- ◆ Lead the Oracle Lease Management (OLM) Deployment Project brought from US Caterpillar Finance HQ to Japan Office to optimize financial product contract processes and consolidated financial statements and improved business process.

- ◆ Gathered business requirements and reported and managed Japan Office's system issues to US HQ and improved the OLM by globally cooperating with China and UK and upgraded the OLM cooperated with US HQ.
- ◆ Presented project updates to the President of the Japan Office and visited the US HQ, Nashville to promote the new OLM deployment project. Visited UK Office to familiarize with their similar experience of OLM.
- ◆ Optimized the life of the financial product deals and business procedures.
- ◆ Configured data populating systems to extract essential data.
- ◆ Lead the Learning Material Project and introduced the materials to the Japan Office's intranet for employees and provided training to create sustainability of implemented system and continuous operational excellence.
- ◆ Submitted the evidence to support the internal auditing for Sarbanes-Oxley.
- ◆ Selected as a highly skilled representative and visited the US HQ to build automated Japan legal document methods.
- ◆ Represented Japan Office for the Caterpillar Group Leadership Personal Development Program.
- ◆ Wrote business proposals and secured funding for professional courses for self-developments.
- ◆ Evaluated as Grade A (Top 1% of approximately 100,000 employees in Caterpillar Inc.) for the Performance Management Process that was approved by the US Caterpillar Finance HQ. (2008)

#### **Customer Service Associate, 2003-2007**

Managed various finance contracts. Involved in the HQ lead global project as a representative of Japan office.

#### **Key Results:**

- ◆ Generated legal documents for financial products including lease, instalment sale, capital loan and syndication loan contracts. Bought and renewed insurance for the assets of contracts.
- ◆ Claimed the insurance for customers in accident or bankruptcy. Negotiated the premium rates and contract conditions with insurers for customers. Organized interdepartmental meetings for accurate operations.
- ◆ Certified in Six-Sigma-Green-Belt for business improvements.
- ◆ Introduced the global corporate intranet to the Japan Office and corporate webpage to improve insurance claiming processes for customers.
- ◆ Integrated the Japan and US customer database and deployed complaint management systems, which increased customer satisfaction.

#### **Intern, Accounting & Customer Service, 2002 to 2003**

#### **Key Results:**

- ◆ Performed account reconciliation and supported financial contract management.

## **EDUCATION & CERTIFICATIONS**

### **INDIANA UNIVERSITY — Indianapolis, IN**

Master of Arts, 2024

- Thesis: Miyakozawa, A. (2024). *The Future of Philanthropy: Technology for the Public Good*. Indiana University Lilly Family School of Philanthropy

**UNIVERSITY OF NOTTINGHAM — Nottingham, United Kingdom**

Executive MBA, 2018

- Thesis: Miyakozawa, A. (2018). *The emergence and evolution of impact investing in Japan*. Nottingham University Business School.

**SHOWA WOMEN'S UNIVERSITY — Tokyo, Japan**

Bachelor of Arts, Linguistics, 2003

**PROFESSIONAL DEVELOPMENT**

**Designations:**

- ◆ Notice to Schedule (NTS) received for Certified Public Accountant (CPA), National Association of State Boards of Accountancy (NASBA) (2020) – Jurisdiction: Indiana, USA
- ◆ Six Sigma Green Belt in Caterpillar Financial Services (2006) - Japan
- ◆ Certified Insurance Solicitor, (2005) - Japan
- ◆ Certified Bookkeeper for Sole Proprietors (2003) - Japan

**Affiliations:**

- ◆ Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA)
- ◆ The Association of MBAs (AMBA)

**Professional Training:**

- ◆ 2022 Social/Behavioral Researchers, issued by Collaborative Institutional Training Initiative (CITI Program)
- ◆ 2021 Social and Behavioral Responsible Conduct of Research, issued by Collaborative Institutional Training Initiative (CITI Program)
- ◆ 2021 Impact Measurement & Management for the SDGs – Coursera
- ◆ 2016 Certified Fundraiser Training - Japan Fundraising Association (JFRA)
- ◆ 2016 Social Impact Investing and Measurement - Japan Fundraising Association (JFRA)
- ◆ 2016 ARUN Social Investment School – ARUN at Tokyo, Japan
- ◆ 2011 Financial Statement Analysis Course - Temple University
- ◆ 2011 Public Company Level Bookkeeping course at Tokyo Accounting Centre (TAC)
- ◆ 2006-2009 Business Management Consultant Professional School - TAC

**Publication and published article:**

- ◆ Onishi, T., & Miyakozawa, A. (2023). Venture Philanthropy. In *The Encyclopedia of Nonprofit Management, Leadership, and Governance*. Edward Elgar Publishing (U.K.).
- ◆ “Nonprofits and Donor-Advised Funds: Perceptions and Potential Impacts”, Indiana University Lilly Family School of Philanthropy With support from Schwab Charitable (2020)
- ◆ “Social innovation in labor market amid COVID crisis”, supported by KIBOW Impact Investment Foundation (2020)
- ◆ “History of US Philanthropy Timeline”, Learning to give (2023)

**Presentation and Invited Talk:**

- ◆ “The Future of Philanthropy: Technology for the Public Good” at Poster session at ARNOVA 2023 Conference on November 17, 2023 hosted by Association for Research on Nonprofit Organizations and Voluntary Action (ARNOVA)

- ◆ “Social innovation in labor market amid COVID crisis” at Counter-COVID Online Pitch on August 24th, 2020, hosted by KIBOW Impact Investment Foundation

**Community Service:**

- ◆ Board member at Philharmonic Orchestra of Indianapolis – Indianapolis, IN, USA
- ◆ Program manager at NPO Pacific Rim International Camp – Tokyo, Japan
- ◆ Committee member at International Children’s Bunko Association – Nottingham, UK

**Computer Skills:**

- ◆ Microsoft Office (Outlook, Word, PowerPoint, Excel, Access, Visio)
- ◆ Computer Assisted Qualitative Data Analysis Software (CAQDAS) (ATLAS.ti and NVivo)
- ◆ Computer Assisted Quantitative Data Analysis Software (Stata)