



Untapped Philanthropy Episode 1: Who determines technology innovations for philanthropy?

Kerrin Mitchell: Hello, and welcome to the Untapped Philanthropy podcast. **I'm your host and Fluxx co-founder Kerrin Mitchell.** I've spent my career exploring technology's role and amplifying impact within our social sector, and more specifically, helping funders to learn to leverage technology and data to connect and better serve our collective causes, constituents and communities.

In this podcast series, my team and I will profile social sector leaders, public figures, philanthropists and industry futurists to explore this fascinating intersection of funding, technology and policy. We're here to analyze the most critical and formative topics and trends that shape philanthropy both today and tomorrow. We hope this series leaves you inspired to think and act through a more collective and visionary lens.

Without further ado, **I'm thrilled to introduce untapped philanthropist first guest to CEO and founder of threshold.world, Dan Lammot.** Dan, please go ahead and tell us a little bit about yourself.

Dan Lammot: Hi, Kerrin. So good to be here. And really grateful for the opportunity. So thank you for that. So I'm Dan. I am a surf bum at heart, and I'm an ocean activist, I'm an anti-racist, and I play around with technology and just feel super privileged to be able to do things that serve nonprofits around the world. And like my fellow threshold leaders here at threshold.world, just trying to make the world a little bit better.

Kerrin: I love it. And can you tell us a little bit more about your career path? How, how did you end up where you're at what specifically led you to threshold.world and to philanthropy? What's the backstory there?

Dan: You know, I started out in banking and then moved to banking technology, and, and spent a bunch of years helping banks leverage technology to either better serve their customers and or make more money. And, and it was great, I got to work with a lot of smart people got to go to a lot of different places. And the thing that I learned through all of that was that if you focus on a specific market, you actually can get pretty good at leveraging technology. And that can bring the cost down. And it can also deliver more benefits to customers.

But after a bunch of years of working with banks, and no offense to bankers out there, I wanted to do something that was more aligned with my values, as did a number of other people that I was working with at the time. And so we had this opportunity to apply that vertically and I focused on technology, education, and the nonprofit market. And, and I've been hooked ever since. And I don't plan on doing anything else. So this is it.

Kerrin: I feel the same way, people oftentimes ask me that exact question. And my response actually mirrors a lot of what you said. So that really resonated for me. Actually, on that note,



can you provide an overview of SMA threshold services and solutions just for those who may not be as familiar with your organization and what you guys are up to?

Dan: Yeah, sure. We're at the core, we're, we're restless, in, in our views on the state of the world. And so what we've been trying to do is to understand where are the white spaces that we can actually go, not just deliver an incremental change through technology, but really a whole category shift? And so as a team, we've been trying to understand why it is so hard for the 10s of millions of nonprofit program managers around the world to measure and report upon and then learn from the outputs, outcomes and impacts of the work that they do.

And so over the last couple of years, we've been spending a lot of time in deep research, trying to look at that problem and see what technology's role is in potentially helping to solve, solve it. And so, we've just recently announced the availability of our platform. That's called threshold.world. And it is a program design and storytelling platform for nonprofit program teams.

And so our goal in releasing threshold.world is to try to bring together really beautiful consumer design that's easy to use and requires either no or little training with really great price accessibility, kind of backed by industrial-strength, you know, technology that's safe and secure and scalable. So that these project and program teams that are all over the world in the trenches, you know, on the frontlines doing the work that we all need them to do now more than ever, can effectively go, you know, go from strategy to story, and be able to communicate the results of their work to both their colleagues, but also all the other stakeholders, they need to keep involved. So, it's early days, but we're really excited. And we'll see where it takes us.

Kerrin: Incredible and as you walk down that path, and you envision this way that you hope to see it change and considering the landscape of how foundations, nonprofits and communities interact, what are some of the key things that that are going to be especially impactful for you to explore with this new product?

Dan: That's a great question. The early customers that have been using it have been educating us on how there is this huge void of data and information and learning in the area of program delivery. And it isn't that information, data and knowledge doesn't exist, it's just that it doesn't make it back to everybody else. And one of the things that I've always loved about working in the nonprofit sector is this willingness to share, collaborate, and be able to stand on each other's shoulders to try to make more progress.

And that's where the storytelling piece comes in. It's this idea that if you combine data with narrative, with images, and video and other visual elements, that actually gets people's attention by multiple factors more than just any of those elements on their own. And so our hypothesis is that if we combine those things, and we make it really easy for people to tell stories, that learning will then be able to travel throughout the market better. And so some, some may have seen that at the NetHope global summit this year, we put this big, audacious



goal out there, which is to tell a billion stories with our partners and our customers over the next several years. So, we're gunning for it, and we're going to see how it plays out.

Kerrin: That's exciting. Yeah, it's such an interesting, delicate balance that we have to walk as technologists – we have to balance the way we work now while also looking ahead to the future. And when I refer to the now, I mean the current state of how I get my operations and tactics done, and can you mirror that to the future when building the next gen of industry innovation, that will actually, in fact, require folks to get outside of their comfort zone, in some ways break the very processes that they're currently hanging on to.

So, it's a very fine line we walk in trying to enroll people in the future of work, without moving too fast – challenge the norm, but don't overstep your role, mobilize the collective but honor uniqueness. And what's your take on this? Is it our job to paint a picture of what could be? Or is it like the Field of Dreams story of "if you build it, they will come"? You know, what, what is our role to move at the pace or lead the pace of innovation? What do you see as that balance?

Dan: That's, that's a great question. I don't think there's any perfect answer, but we try to start with listening, you know, the ideas that we're executing upon now. I don't think there's really anything unique, I don't think they're groundbreaking. I don't think it's going to disintermediate the nonprofit market the way we've seen in some of the commercial sectors. But what we have been able to do, because we had this incredible opportunity to listen across such a diverse group of individuals that are out there doing the work was to bring together a number of things that they perhaps couldn't have done on their own, because they're doing the work.

And so, you know, we took that call to action and take responsibility for trying to bring those resources together for their benefit in a way that's also ethical, that's also moral, and allows them to hopefully do their jobs better than they could have otherwise. So, I think it's both but I also think you have to shift between one and the other depending on which audience you have the honor of working with at different points in time.

Kerrin: Yeah, it's interesting in the grantmaking side where we come from versus say, some of the storytelling, I think that it can vary even within technologies in the public sector as to where we have to draw that line in that balance. So just definitely always curious to hear people's opinion on that topic. And I think you mentioned something that was truly interesting to me to the economist to me. And I say economist as in like, in college when I was really into economics, but also the side of me that still gravitates towards many, you know, articles daily on this matter. But there's something you mentioned that is truly unique about our industry and that it is a cooperative. I mean game theory in that sense, it is generally non-competing entities that only benefit from these aligned visions and the awareness of their contributions and their ability to track impact at meta and micro levels.

So you know, I like that you mentioned that because if you play this out, and let's say you get a quorum of folks to adopt this new framework for b.world, I mean, what does that ecosystem human look like? And what's your vision for the future state? If you could, like wave a magic



want a couple years from now, what does that mean to you? How are people interacting differently? So, paint us your vision here.

Dan: Yeah, great. I love that question. You know, I used to think when I was doing all this work in the past that everybody had to agree on all of the same things. And that if you got all the data and information into one platform it would sort of solve all of our problems. I couldn't have been more naive about that.

Over the last couple of years, we've been in a position to contribute to a sector defined movement around this idea of a common data model for nonprofits. And it's been invested in by large technology players like Microsoft who have really led the way. And one of the key tenants of it is that it's open-source. One of the things that I really learned through all of that is that if we can adjust and agree on some of the key things, then the rest of it is sort of, you know, the connective tissue that might make the system work and so forth.

There's a lot of room for creativity in that part of it. But if we can agree on the core things like how to describe a name of an individual, then we can save a ton of time on debates that are inconsequential for trying to achieve better outcomes. And so being able to contribute to efforts like that, and seeing them take root and be able to be manifest in all kinds of different technologies, and seeing technology players that historically would have been viewed as competitors come to the table to collaborate around that, in addition to many participants in the sector that are direct delivery organizations and individuals, it's just been a real privilege to have a seat at that table and make a small contribution to it and then be able to incorporate that into our own products, and our own vision to be able to go execute upon it. So we almost get to double-dip on that. It's a bit of an unfair advantage. But we're super excited about where this has the potential to take us and find that balance between flexibility and structure. That's so hard to achieve.

Kerrin: Yeah, I think it's actually really interesting when you think about this idea of the partner and vendor landscape that exists as an ecosystem and brings together all these various pieces that move into resources, staffing, and training, it's wonderful to see everyone's sort of understand that as a part of that ecosystem, we have to embrace that mindset. And I think that's the part that is really captivating. And it's the same reason that I got into technology for, you know, the social sector too, is because that is a very enrolling thing to think about how do we all do things better together, and I think that's an exciting aspiration that unites all of us. So, I'm with you, this is something that's truly different about our economy, and the group we get to work with. I'm excited.

Dan: Me too. We have a friend and a partner, a gentleman named Tim Lockie, who runs an organization called Now It Matters. And he just wrote this blog post that I think the title of it is perfect for this. It's a little bit of a play on a biblical reference, but instead of the End of Days, he called it the And of Days, and I thought that was just like spot on. That's the phase of technology in philanthropy that we are in now. And if you're not in that, then then you need to



close up shop and move on. Yes, if you're not focused on the end of days, and the and for the benefit of the customers, then you really don't belong in this market.

Kerrin: I 100% agree. And I think that's one of the things I tend to get u on my soapbox about, because the reality of being an organization that is built for and by philanthropy, is that it's about the mindset, it's about the culture, it's about how you partner, what you build, how you even get the design ideas, and where that all infiltrates in, and it has to be informed by it. So one of the things for example, we think about is that you have to start somewhere. I mean, even at Fluxx for us, you know, we have great aspirations to rebuild the structure of the grantee experience. Always asking ourselves, what could the grantee experience be like?

There are new data initiatives, there's industry-wide action that's occurring, not just that threshold.world, but also groups like the TAG Affiliation Group, I think that's such a great opportunity for us all to contribute and bring frameworks together to say can we all start to look at this and mirror each other's best practices and choose how we're going to approach this together as a unit. I think it's so powerful.

I'm curious, what suggestions do you have for folks who are just starting out in that journey and who are wanting to adopt some of these frameworks, and learn about common data models, storytelling, and such, where, where should they begin?

Dan: Well, a funny story. You and I used to compete, and people should know that. And, you know, one of the lessons I learned when our teams were competing for the same business was that when we lost to Fluxx, and we often lost because you were doing things that we're more right than we were doing them.

And one of those key lessons in the core of that was that the people that were going to use the software, that we're going to use the technology day in and day out, liked Fluxx better than what we had. At the end of the day, you have to deliver something that the end-users are going to feel comfortable using, feel safe using, and actually get some joy out of it, because a lot of the work that they have to do is drudgery, just like all of us in our lives, you know, some of the time we get to do what we want to do and the rest of the time, we do what we have to do, right. And so I think that one of the lessons and all of that is that we really need to assume that we have everything wrong and that we need to go and listen to the people that actually have to do the work and that and allow them to educate us on how we might be able to apply our talents to their benefit. And that can help all of us get started.

Kerrin: I love it. And in terms of you know what that looks like. Like you said, getting started could take the form of various different engagements with various different partners or tools. And we're now in the world where we don't have to go to one, one partner or one vendor or one technologist to get everything we can choose best in breed and say how do we look at things like b.world and in flux and others and look at that as the integrated ecosystem, which, you know, obviously, we are so excited to learn more about b.world and look at that partnership. But that becomes an interest is a very important part of building success for the sector. So what kind of partnerships are you guys looking at as you move forward? Or that you



would ask of the community? Are you looking at data? Affiliations? Hyperlocal groups? How do you start to see partner ecosystems for b.world and for threshold.world.

Dan: Wow, that's a huge question for us at this stage. I think that you know, one of the things that we talk a lot about is thinking about the journey that data takes through different systems and how does that represent what's actually happening out in reality? And so, a key part of what we're thinking through is where do we stop? And where do we start? And, and so a big part of that is thinking about technology, storytelling, and being able to bring data and visuals and narrative together so that organizations and individuals can share the work that they're doing, the challenges that they're trying to overcome the participant transformational stories. You know, certainly there's a case to be made that that auto-feed marketing engines and things like that, but there's also a case to be made, that it really should go wherever those program and project team members think it should go.

And as we've been learning away through that, some of them have been telling us, you know, this really ought to be published and rating systems and, and it really ought to be published openly in different forums. And so we've been thinking a lot through, you know, who and where what might we be able to connect with such that we can amplify some of the voices of the people that are involved in those initiatives, whether they're, they're doing the delivery, or they're participating or gaining agency in their own lives. And, and that's, that's probably our first thing to tackle in the next few months.

Kerrin: I love that. And I think that's a critical piece that's really been missing. I think you innately have a power dynamic that has to be reset to some degree. And part of that is bringing voice to nonprofits and to folks that are saying, here's what we're doing, why we're doing it. And instead of trying to fit a bunch of squares into round holes, you instead have something that is a general area for collaboration, and how that all fits together. It's honestly the thing that captivates me the most about what needs to happen for our industry.

I was speaking about this with Kristy, our CEO as well. She and I were just talking about how this is a goal for Fluxx through 2021. As you know more than anyone, you start with the data, you move into your impact and structures and collaboration. And I think from what I know, b.world is just that absolutely critical voice that intersects essentially the equation of technology for the nonprofit's to really get their voice out there. So that's awesome.

On that note, I mean, I've asked you a ton of questions. Is there anything that you wish I had asked you that you would that you'd love to like, pose yourself a question and answer it? Because I mean, you got a podcast here and some listeners, so what other things do you think are super important that you'd like to kind of relate to this audience?

Dan: I think there's an idea that all of us really need to get our arms around, which is that the sector that we're working in is, has been sort of served by a status quo of technology and ideology, that that just has to change, especially as we look at the current global pandemic, and all of the impacts it's going to have. It's really not okay for us to just to look at the idea of



incremental change the people that we work with that, that use the things that we produce, and then educate us on how we can make it better, are going to be asked to do a lot more with the same or significantly, or order significant orders of magnitude more with less.

And that's just the reality that they're going to be facing. And so, you know, we need to be thinking about the lessons that have been learned over the last decade or so in the commercial sector, about collapsing the distance between customers and providers, which in our world are supporters and participants. And really think about how can we break that status quo through technology, and make it possible to bring people closer together, supporters are demanding that right? And whether it's funders or individual donors or corporations, we have to accept that we are now living in a purpose economy.

We're seeing the growth of donor advised funds, we're seeing the growth of corporate social responsibility, we have a huge lofty goal that we all need to contribute to around the 2030 agenda with the United Nations. And so it's not okay to just kind of, you know, take a half swing at this, we need to go all in, then we need to be restless about how we make progress really quickly.

Kerrin: Absolutely agreed. I feel like that really hit a chord for me, too. So thank you for sharing all that good stuff. Let's end this podcast on a rapid-fire note, I'm going to run you through a series of short, quick questions. And I encourage you to respond to the very first thing that comes to your mind. Are you ready? What is the trend or movement that you are most excited about in philanthropy?

Dan: The activation of the youth.

Kerrin: Love it. If you could snap your fingers and change one thing about our industry, what would it be?

Dan: I wish we could start with an attitude of abundance instead of scarcity.

Kerrin: Yes. All right. Where do you see yourself in five years?

Dan: Where do I see myself in five years? I see myself as a storyteller in five years.

Kerrin: Wonderful, living or deceased, who is the philanthropist you admire the most?

Dan: Easy question. Melinda Gates.

Kerrin: You know, she went to Duke. That's my little Duke nod. And where can listeners find you online to learn more about your work and that of threshold.world?

Dan: The places I frequent most are going to be LinkedIn. So you can find me at LinkedIn at Dan Lamott, and then also on the blog@threshold.org.



Kerrin: Dan, thank you so much for joining the podcast today and sharing more about yourself and your amazing work. our listeners can learn more about threshold at threshold.world.