

MEETING SUMMARY

Tech Stack and Software

Date: September 18, 2026

■ Quick Recap

Technology in nonprofit organizations is caught between systems too old to keep and tools too new to trust. The discussion moved between the two: legacy platforms reaching end of life with no obvious replacement path, vendors slow to support the software already in place, and AI arriving faster than the controls around it. Two threads ran underneath. The first is accuracy — AI output is confidently wrong often enough that unaudited work is reaching decisions. The second is the training pipeline: if junior staff produce reports without doing the underlying work, the profession loses the step where judgment is built.

■ Summary

Everyday Tools in Use

Before the harder questions, the practical ones. Tools named as genuinely useful day to day included Audible, Copilot, the Genius scanning app, and voice memos recorded on an Apple Watch. The common thread is capture and convenience rather than transformation — small tools that remove friction from work already being done.

Trust and Accuracy in AI Output

Confidence in AI output does not track its accuracy. One example involved an assistant returning misleading information about startup companies; another involved an AI copilot apologizing for having lied when challenged. The practical risk is not the error itself but the fluency with which it is delivered, which makes it easy to accept without checking.

Unaudited Output and the Training Pipeline

A recurring concern was junior staff generating reports with AI and passing them on without auditing, so inaccurate information reaches the people making decisions. The deeper worry is developmental: the profession has always built judgment through doing the underlying work, and a tool that skips that step removes the training as well as the labor. Addressing that knowledge gap is under discussion at board level.

Legacy Systems at End of Life

One organization is operating an EHR system **built in 1997** and is applying for Rural Health Transformation Funds to replace it. The problem is familiar across the sector: a core system old enough to be a liability, a replacement priced beyond the operating budget, and grant funding as the only realistic route to a modern platform.

Vendor Support and User Groups

Getting adequate support from software vendors was raised as a persistent difficulty, with Blackbaud named as one example. The suggestion that followed was to organize a **user group** — on the reasoning that a vendor slow to respond to one nonprofit will respond faster to an organized group of customers raising the same issues.

AI-Assisted Development as an Alternative to Buying

One organization is rebuilding its association management system using AI-powered coding rather than purchasing a replacement, with the potential to save significantly against a traditional software implementation. The migration runs off an existing Phoenix platform over **12 to 18 months**, beginning with individual modules in March rather than a single cutover. The phased approach matters: it keeps the current system running while each piece is proven.

Data Security and Shadow IT

Where AI tools sit relative to organizational data drew the sharpest caution. **Microsoft 365 Copilot offers stronger data protection than external tools such as Claude or ChatGPT**, because the data stays inside the tenancy rather than leaving it. The related risk is shadow IT — staff adopting external tools independently, which puts organizational data somewhere nobody has approved. A workshop on responsible AI use and business applications is planned in response.

Reaching Members Across Learning Styles and Platforms

The closing thread was communication rather than technology: members learn differently and sit on different platforms, so a single channel or format reaches only part of any audience. The difficulty is not choosing the right tool but accepting that several are needed to cover the same message.