

Inspire. Connect. Grow.  
2019 | CHICAGO, IL

#2019Raise

# Raise 2020

# WE'RE GOING VIRTUAL

2 Days of Online Learning & Networking

SEPTEMBER 14-15, 2020

WELCOME

# Fundraising into our Next Normal - New Ways to Use Technology to Build Donor Engagement

Presented by: Barbara O'Reilly, CFRE, Christina Taylor, and Shawn Olds

September 14, 2020





# Raise

2020



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# What we'll learn today...

- Philanthropic trends from past economic emergencies
- Steps your organization can take now to recalibrate your fundraising during this time of crisis
- Ways to use technology and AI in philanthropy to connect with your donors, audience, and constituents





# What History Can Teach Us

# Over the last 60 years...

## **Average giving has grown.**

- According to [Indiana University's School of Philanthropy](#), since 1956, average giving has grown 4.7% (adjusted for inflation) in times of economic growth and decreased by .5% in economic downturns.

## **Lower to mid-level annual donors have seemed to remain the most steadfast.**

- High net worth individuals, foundations, and corporations have lowered their giving levels as the economy has contracted during slowdowns.

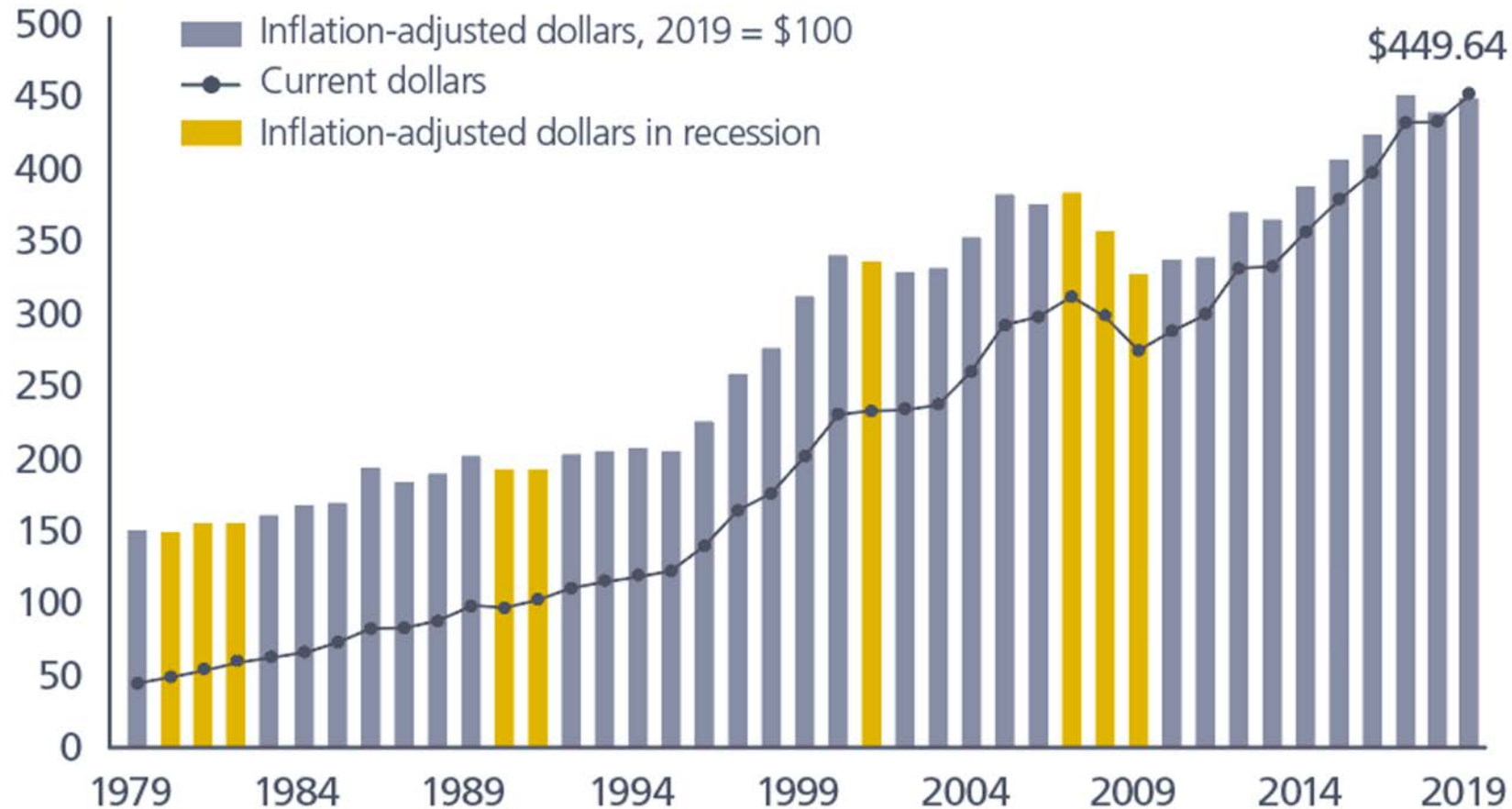
## **Giving has never completely stopped.**

- While the amount donors may give decreases during a slower economy, their giving has continued—especially to charities they have typically supported. This was true even during and after the Great Depression of the 1930s.



# Historical Giving Trends

(in billions of dollars)



# Quick Snapshot of What We're Seeing So Far

**Total COVID-19 Giving To Date: \$13 billion and counting**



Average number of gifts has been up 40% in March-June over 2019.



Facebook is having record usage—over \$3 billion raised.



Average revenue is up about 40% for April-June from 2019.



Donor Advised Funds contributions up 30-50% (\$250 million+ for COVID-19)





# Sending Your Fundraising Back to the Future

# Set Your 2021 Self Up for Success





# Are You Ready?



# Refine Your Case Now



## Your “Why” in Context

What about your organization’s mission is of most value now in light of the Coronavirus and the urgent calls for social justice?

How does your work change because of or responds to increased needs as a result of these crises?

## How You Will Deliver Your “Why”

What will you need to do more of or pivot to do to position your organization because of the emerging needs of the community and this pandemic/social unrest?

## What You Need

How does this translate to increased funding needs that you can present to your donors as opportunities for them to help?

Ask Yourself

# Focus on Donor Retention

## Build Relationship Not Just Raise Cash

**Improving Donor Retention by Just 10% Can Double the Lifetime Value of Your Donor Database**  
- Adrian Sargeant, PhD

- Know your metrics—retention and average giving.
- Diversify giving sources—where are your opportunities?
- Build regular cycle of asking-thanking-reporting.
- Encourage long-term investment through upgrades, monthly giving, and DAFs.
- Ignite donors' sense of agency by inviting them to help—host fundraisers, make additional and other gifts, etc.





# Embrace Multi-Channel Fundraising

Meet Your Donors Wherever They Are



# Let Technology Be Your Fundraising Friend

Technology takes the guesswork out of fundraising.

- It helps you know who your best potential donors are
- It expands your fundraising workforce by automating some of the outreach
- It reduces costs and improves ROI with better response rates and greater likelihood of upgraded giving.





# The Virtual & Hybrid Event Landscapes



# Definitions

These are really not new but they are new to being 100% of the way we are doing events! Think of the Grammy Awards, Kennedy Center Honors (Hybrid and Virtual!)

**HYBRID EVENT** – A combination event where two or more scenarios are at play – Example: An online audience combined with an in-person audience or an online audience with the stage participants only at a studio

**VIRTUAL EVENT** - an online event that involves people interacting in a virtual environment on the web

# The Ever-Pivoting Plan

- Let's talk about your pivot or many pivots you have had this year:
- You've canceled your in-person events, moved into 2021 and/or pivoted to a virtual event in 2020 – how do you engage your audience in this crowded, online, already virtually fatigued environment?
- To charge or not to charge? The pros and cons
- What do your revised sponsor benefits look like? How can they be even more attractive in the virtual space?
- Who is your audience? What types of events would they like to attend?

**“By failing to prepare, you are preparing to fail.”**

- Benjamin Franklin

# Communication is Key!



Clear, consistent, honest communication is key!

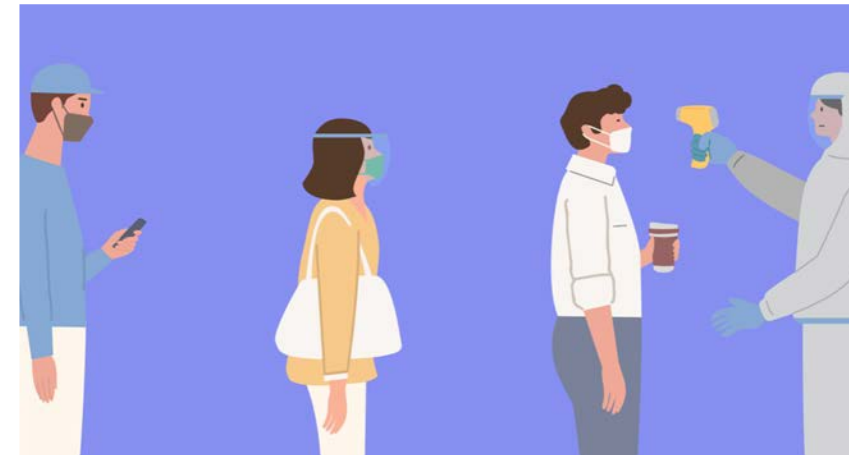
- Ask your donors, board members and constituents their comfort levels with attending an in-person event. Tell them your plan and stay connected!
- Use technology and AI to find their common interests to tailor an event to what they would want to attend.
- Use all your social platforms to continue to communicate the new plan
- Highlight the work you and your organization are doing that impacts the community/constituents you serve right now. Find a way to tie that to current events.



# Things that make you go hmm...

## Take the temperature of your attendees (literally and figuratively)

- Are any of your attendees comfortable showing up in person? If so, what measures will need to be in place and communicated to them to put them at ease that you are prepared to accept them in a safe space?
- Will your loyal supporters/attendees convert to a virtual event easily? What will be important for them to see? Do they have a mutual love for wine or travel – does it make sense to engage a winery in Italy to conduct a tasting and virtual tour instead of hosting an online golf event?



## To charge or not to charge? \$\$\$

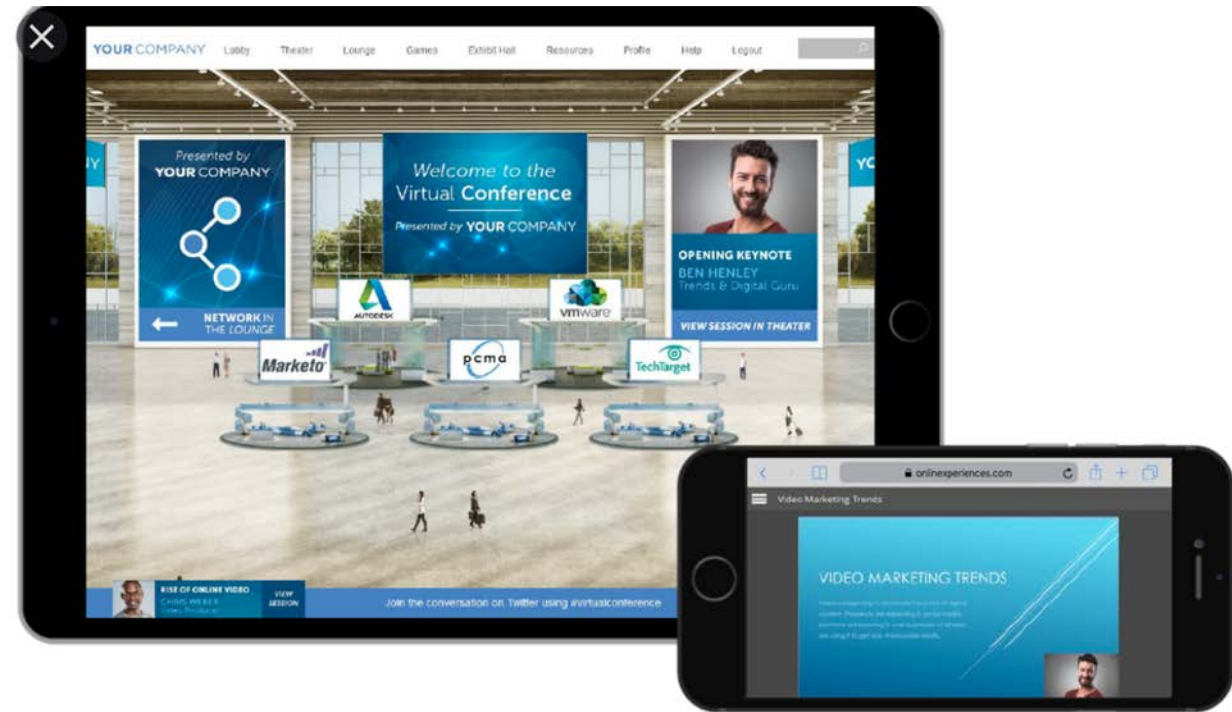
- Pre-pandemic thoughts! And the NOW!



# Revising your Sponsor Benefits

## Sponsor Benefits in the virtual space

- Lower third recognition on the screen (static logo or streaming logo/name)
- Interstitial advertisement or slide
- Opportunity to introduce a portion of the program
- Increased attendance across the country/world, more eyes on them
- Inclusion in a gala box sent to sponsor/donor homes
- Social media and press release mentions
- Hosting of a breakout session or a VIP reception
- Recorded content that can be used immediately following the event



# The Pros and Cons

.....For Virtual Events

Virtual Event Pros	Virtual Event Cons
Flexibility	Networking (face to face) opportunities are limited and not the same as in person
Scalability	Attendees who have limited tech ability
Environmentally friendly (lower carbon footprint)	Distractions
No weather back up needed	
Easier to collect better analytics and data than a live event	
More cost effective	
Low barrier for entry	
Reusable content	



More Pros than Cons!



# The Pros and Cons

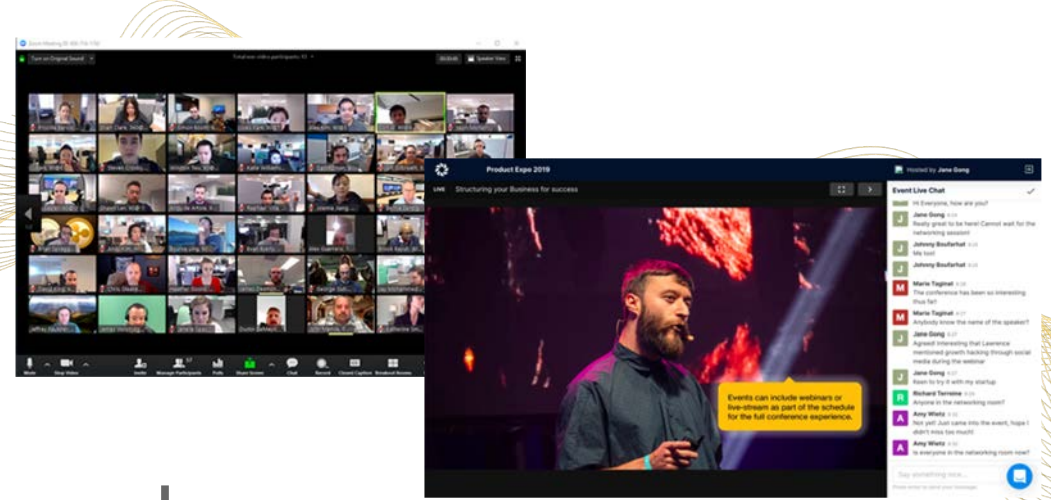
.....For Hybrid Events

Hybrid Event Pros	Hybrid Event Cons
Giving people the option to come to an event if they are comfortable	Engaging both the in-person audience and the at home audience
Engagement of a venue and a professional backdrop for your event	Potential health risks
An option for a more positive experience for those with accessibility issues	Could be more costly if you have to pay for a virtual event and an in-person event
Reusable content from the virtual side	
Weather back up is in place for the virtual side	
Less distractions if guests are in person	
Scalability	
Flexibility	



More Pros than Cons!

# Choose the Right Tools



## Live Streaming

- Facebook Live
- Instagram Live
- Twitter Live
- YouTube Live
- Twitch

## Virtual Event Platforms

- Virtual Tables
- Private microsite
- Hopin
- Run the World
- Comms Partners
- Hey Summit

## Video Conferencing

- Zoom
- Go to Meetings
- Google Hangouts
- Meet
- Skype

# Engagement!!

Keeping eyes on the screen for your event is going to be a challenge!

- **Ensure your program is short** – you cannot just take your in-person event and plop it online. There must be some cuts and adjustments to your schedule. Our recommendation – no longer than 1 hour – sweet spot 45 minutes!
- **Dynamic speakers!** If your leadership is dry and monotone...choose someone else, a board member, a celebrity who has a connection to your work, compelling testimonials from your beneficiaries.
- **Activity on the screen – change it up!** Videos about your work, musical performances, dance, art, chef demos, wine tastings, mixology sessions - static talking heads will lose people!
- **Run of show management** – if you have a fun activity or a local celebrity who will be participating make sure to put that on the back end of the program to keep people around – use the news strategy – coming up next, stay tuned for....
- **Send guests something** to participate with – gala in a box – example: mixology session – send guests the ingredients for what the mixologist is going to make to have that part of the program be interactive



**Wikipedia: Media market**  
A media market, broadcast market, media region, designated market area (DMA), television market area, or simply market is a region where the population can receive the same terrestrial television and radio station offerings, and may also include other types of media including newspapers and Internet content. They can coincide or overlap with one or more metropolitan areas, though rural regions with low population densities are also designated as markets. Conversely, some large metropolitan areas can sometimes be regions into several, meaning that area may be able to receive content from at

**Predicted Prospect Insights**  
Total Records: 1000 | Selected: 0% | 10/26/2020 10:11 AM | 10/26/2020

**State Affinity**  
Top 5 States:  
1. California  
2. Colorado  
3. Connecticut  
4. Arizona  
5. Alabama

**Wealth Rating**

Rating	Percentage
\$1-\$100	34%
\$1-\$50	26%
\$1-\$25	16%
\$1-\$10	16%
\$0-\$5	2%

**Gender**  
25% Female, 75% Male

**Education**

Education Level	Percentage
+ High School	9%
High School	19%
Some College	17%
Bachelor	33%
Graduate	23%

**Generational Breakdown**

Generation	Percentage
Silent	~10%
Baby Boomers	~45%
Gen X	~25%
Gen Y	~10%
Gen Z	~5%

# The Pivot to New Technology

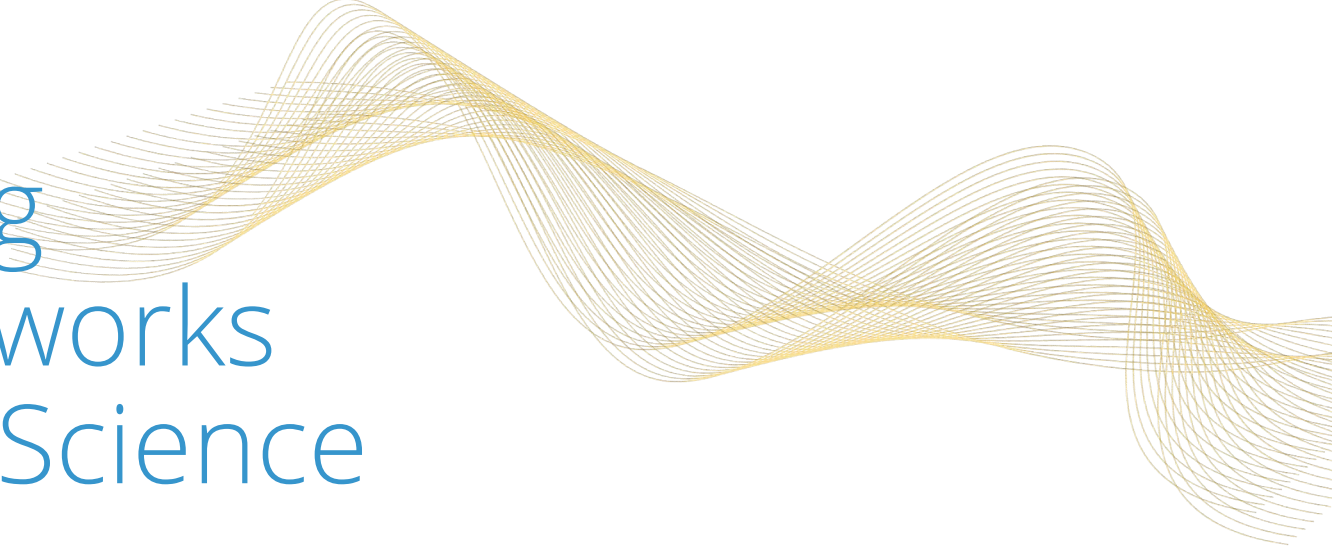


# We are turning lemons into lemonade

Why we should be optimistic if you have not already figured it out:

- Six Feet
- The light speed acceleration around the technology curve
- The power of the Human AI Team
- This is not a band aid but the first day back in the gym to build the foundation

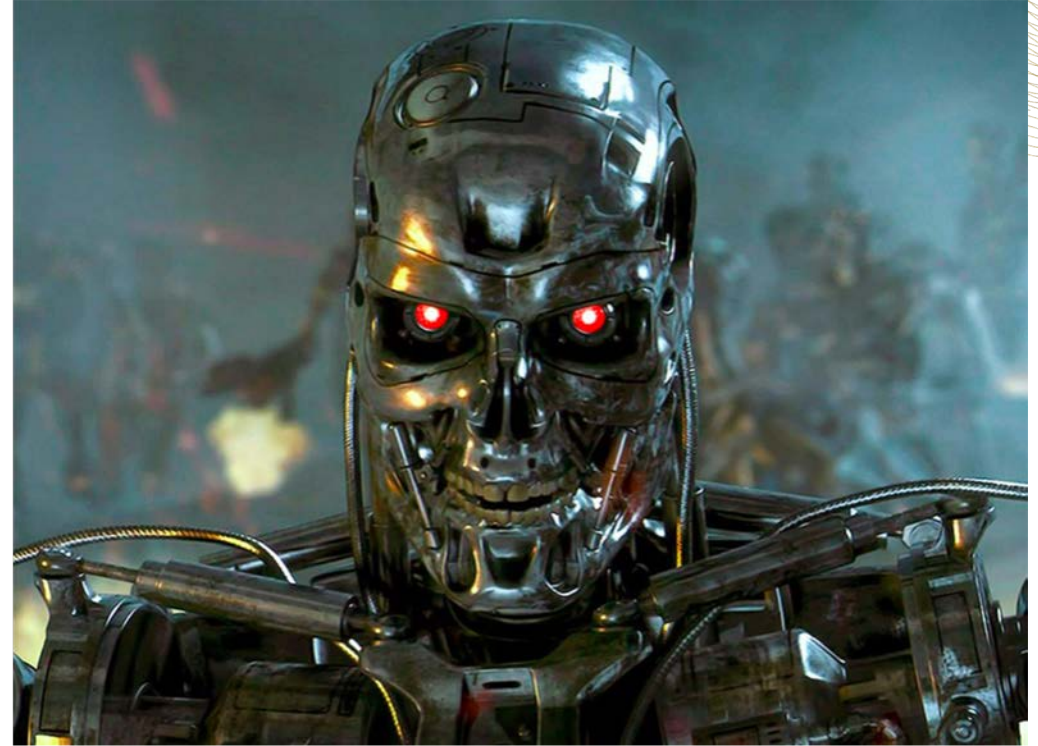
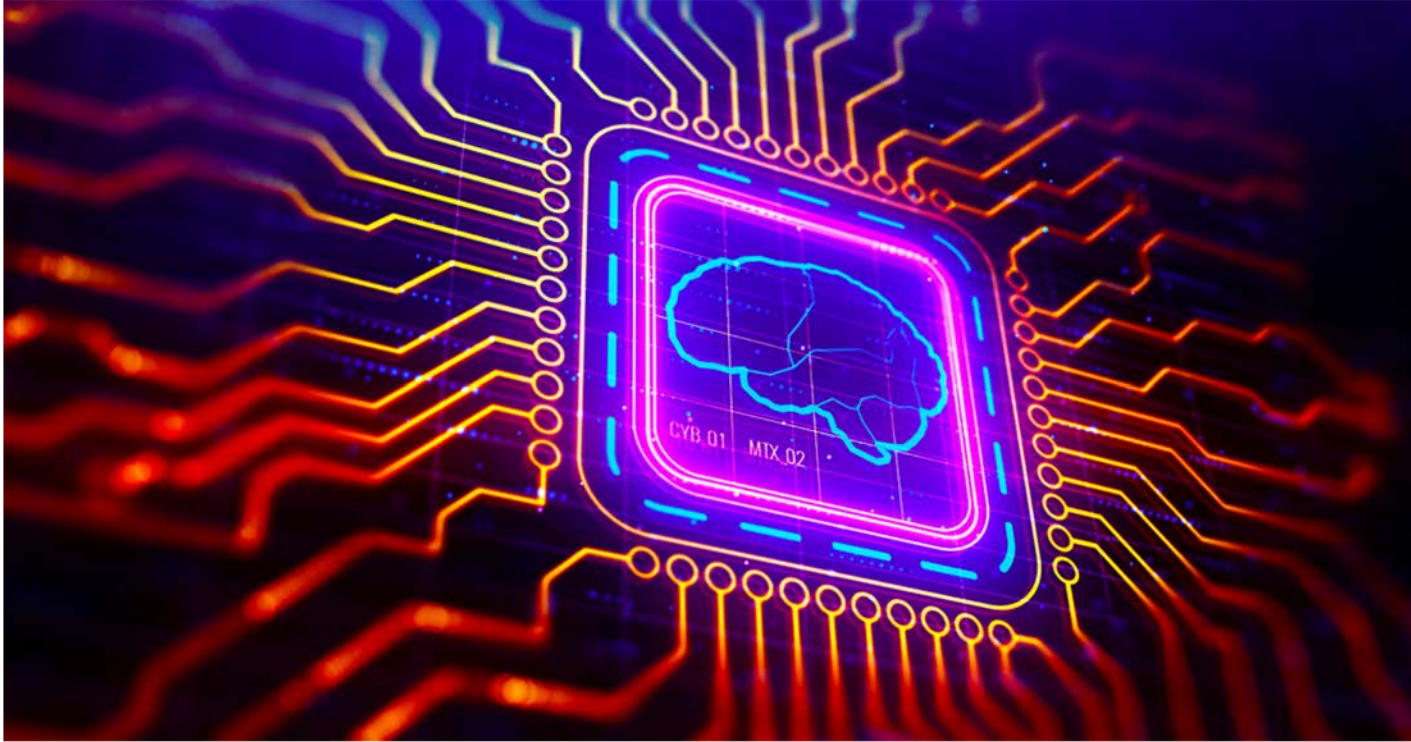
# Artificial Intelligence Machine Learning Neural Networks Data Science



- Nonprofit professionals hear these words and realize that change is coming
- What they may not realize is that this change will dramatically transform their world
- The successful nonprofits of tomorrow will be the ones who invest time and money today to understand and embrace AI, machine learning, and data science
- What may come as a pleasant surprise is that the investment of time and money may not be as significant as they fear because AI has been democratized



# Artificial Intelligence "AI"





On 1/1/2014

My wife and I started  
to build our first  
neural network



If you are not careful, they will multiply and grow!



# What is AI?

Data

Algorithms/  
Models

Tools/  
Infrastructure

Computing  
Power

Machine Learning is the most common subset of AI. Simply defined, Machine Learning allows AI assistants to learn from data without human intervention. It requires four components:

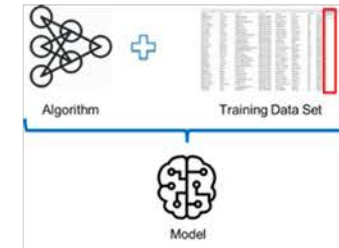
1. Data
2. Models/algorithms
3. Tools/infrastructure
4. Computing power



## Data:



## Algorithms and Models:



## Tools/Infrastructure:



## Computing Power:



# Data

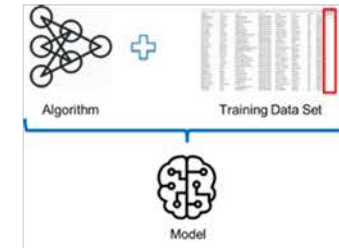




## Data:



## Algorithms and Models:



## Tools/Infrastructure:



## Computing Power:



# Algorithms/Models



id	name	email	phone	address	city	country	zip
1	John	john.doe@company.com	555-123-4567	123 Main St	New York	USA	10001
2	Jane	jane.doe@company.com	555-234-5678	456 Elm St	Los Angeles	USA	90001
3	Bob	bob.doe@company.com	555-345-6789	789 Oak St	Chicago	USA	60601
4	Alice	alice.doe@company.com	555-456-7890	101 Pine St	San Francisco	USA	94101
5	Charlie	charlie.doe@company.com	555-567-8901	202 Birch St	London	UK	EC1A 1AA
6	Diana	diana.doe@company.com	555-678-9012	303 Cedar St	Paris	France	75001
7	Eve	eve.doe@company.com	555-789-0123	404 Maple St	Berlin	Germany	10115
8	Frank	frank.doe@company.com	555-890-1234	505 Spruce St	Moscow	Russia	125000
9	Grace	grace.doe@company.com	555-901-2345	606 Willow St	Tokyo	Japan	100-0001
10	Heidi	heidi.doe@company.com	555-012-3456	707 Ash St	Sydney	Australia	2000
11	Ivan	ivan.doe@company.com	555-123-4567	808 Birch St	Mumbai	India	400001
12	Judy	judy.doe@company.com	555-234-5678	909 Cedar St	Delhi	India	110001
13	Kyle	kyle.doe@company.com	555-345-6789	1010 Elm St	Bombay	India	400001
14	Laura	laura.doe@company.com	555-456-7890	1111 Oak St	Calcutta	India	700001
15	Mike	mike.doe@company.com	555-567-8901	1212 Pine St	Chennai	India	600001
16	Nancy	nancy.doe@company.com	555-678-9012	1313 Birch St	Hyderabad	India	500001
17	Oscar	oscar.doe@company.com	555-789-0123	1414 Maple St	Bangalore	India	560001
18	Peter	peter.doe@company.com	555-890-1234	1515 Spruce St	Coimbatore	India	641001
19	Quinn	quinn.doe@company.com	555-901-2345	1616 Willow St	Mysore	India	570001
20	Rachel	rachel.doe@company.com	555-012-3456	1717 Ash St	Bhubaneswar	India	751001
21	Sam	sam.doe@company.com	555-123-4567	1818 Birch St	Cuttack	India	753001
22	Tina	tina.doe@company.com	555-234-5678	1919 Cedar St	Bhubaneswar	India	751001
23	Uma	uma.doe@company.com	555-345-6789	2020 Elm St	Bhubaneswar	India	751001
24	Victor	victor.doe@company.com	555-456-7890	2121 Oak St	Bhubaneswar	India	751001
25	Wendy	wendy.doe@company.com	555-567-8901	2222 Pine St	Bhubaneswar	India	751001
26	Xavier	xavier.doe@company.com	555-678-9012	2323 Birch St	Bhubaneswar	India	751001
27	Yvonne	yvonne.doe@company.com	555-789-0123	2424 Maple St	Bhubaneswar	India	751001
28	Zoe	zoe.doe@company.com	555-890-1234	2525 Spruce St	Bhubaneswar	India	751001

Algorithm

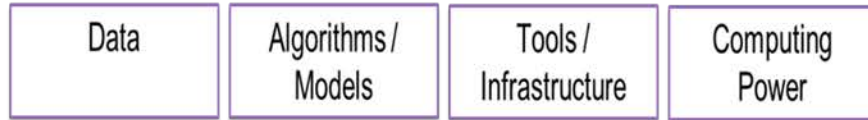
Training Data Set



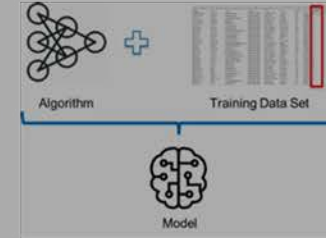
Model



## Data:



## Algorithms and Models:



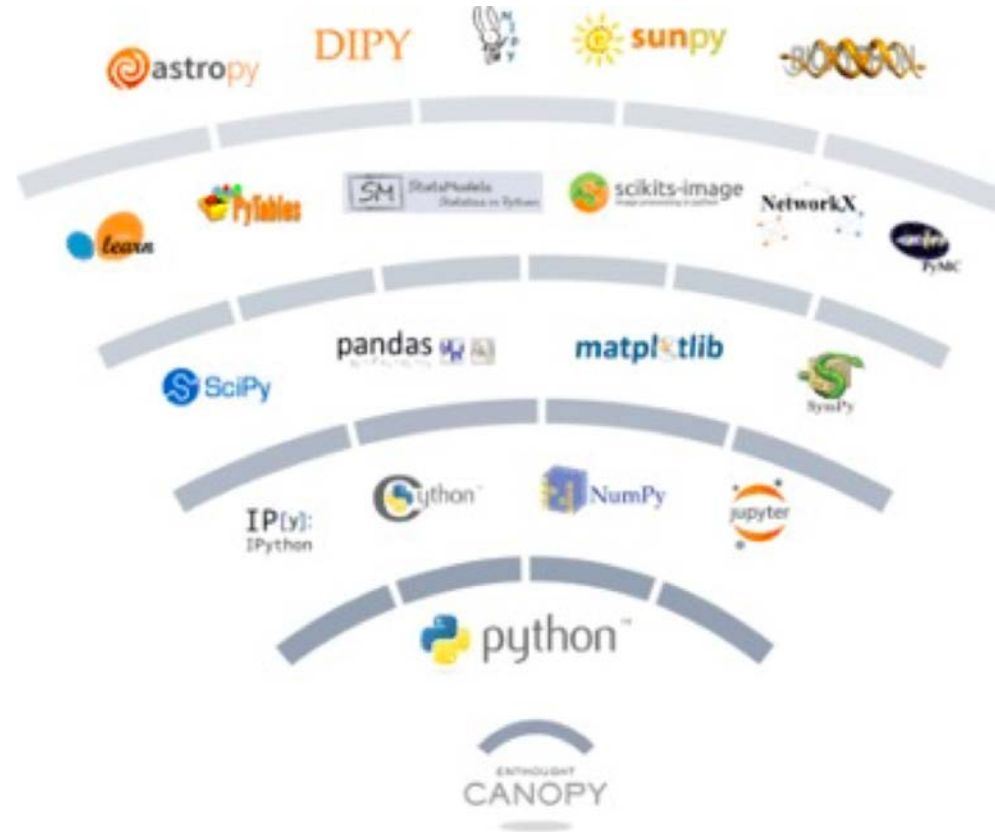
## Tools/Infrastructure:



## Computing Power:



# Tools/Infrastructure

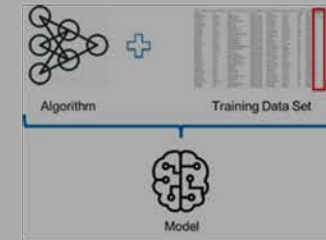




## Data:



## Algorithms and Models:



## Tools/Infrastructure:



## Computing Power:



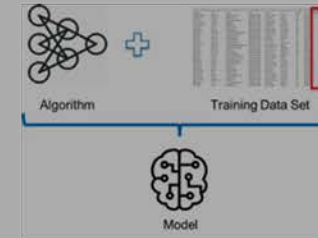
# Computing Power



## Data:



## Algorithms and Models:



## Tools/Infrastructure:



## Computing Power:





# AI in philanthropy



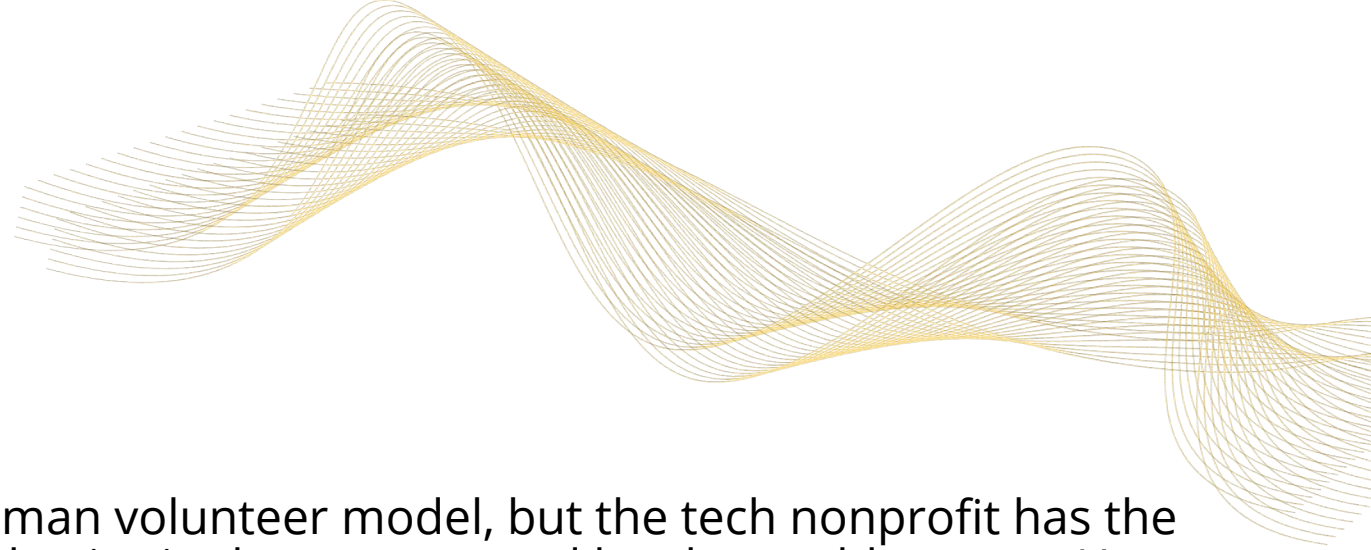
AI for fundraising

AI for philanthropy



# AI in Philanthropy

What is beneath the surface



## Suicide Prevention

[Crisis Text Line](#) still implements a human-to-human volunteer model, but the tech nonprofit has the largest open source database of youth crisis behavior in the country, and has been able to use AI to dramatically shorten response time for high-risk texters from 120 seconds to 39. Crisis Text Line leveraged machine learning to identify the term “ibuprofen” as 16 times more likely to predict the need for emergency aid than the word “suicide.” Now using AI, messages containing the word “ibuprofen” are prioritized in the queue. (Vox.com “Nonprofits, not Silicon Valley startups, are creating AI apps for the greater good”)

## Finding refugees

There are one million orphan refugees in refugee camps. That would be a lot of faces to look through – a million photographs, if you had to go through them in a paper book. Fortunately, with a deep neural network for faces created with Refugees United, you can use an iPad in a few minutes to help find a kid in a camp anywhere in the world. (<https://socos.org/> and Dr. Vivienne Ming).



**Predicted Prospect Insights**  
Total Prospects: 1000 | Matched: 99% | 10/10/2020

**State Affinity**

State	Rank
California	1
Colorado	2
Connecticut	3
Arizona	4
Alabama	5

**Wealth Rating**

Rating	Percentage
\$1-\$100	34%
\$1-\$50	28%
\$1-\$25	16%
\$1-\$10	16%
\$0-\$5	2%

**Giving Capacity Over 5 Years**

Category	Percentage
Higher	14%
High	42%
Medium	27%
Lower	9%
Lowest	9%

**Gender**

Gender	Percentage
Female	25%
Male	75%

**Generational Breakdown**

Generation	Percentage
Silent	~10%
Baby Boomers	~45%
Gen X	~25%
Gen Y	~15%
Gen Z	~5%

**Education**

Education Level	Percentage
+ High School	9%
High School	19%
Some College	17%
Bachelor	33%
Graduate	27%

# Above the waterline

# AI in fundraising

# What boodleAI does

boodleAI provides people-focused predictive analytics using:

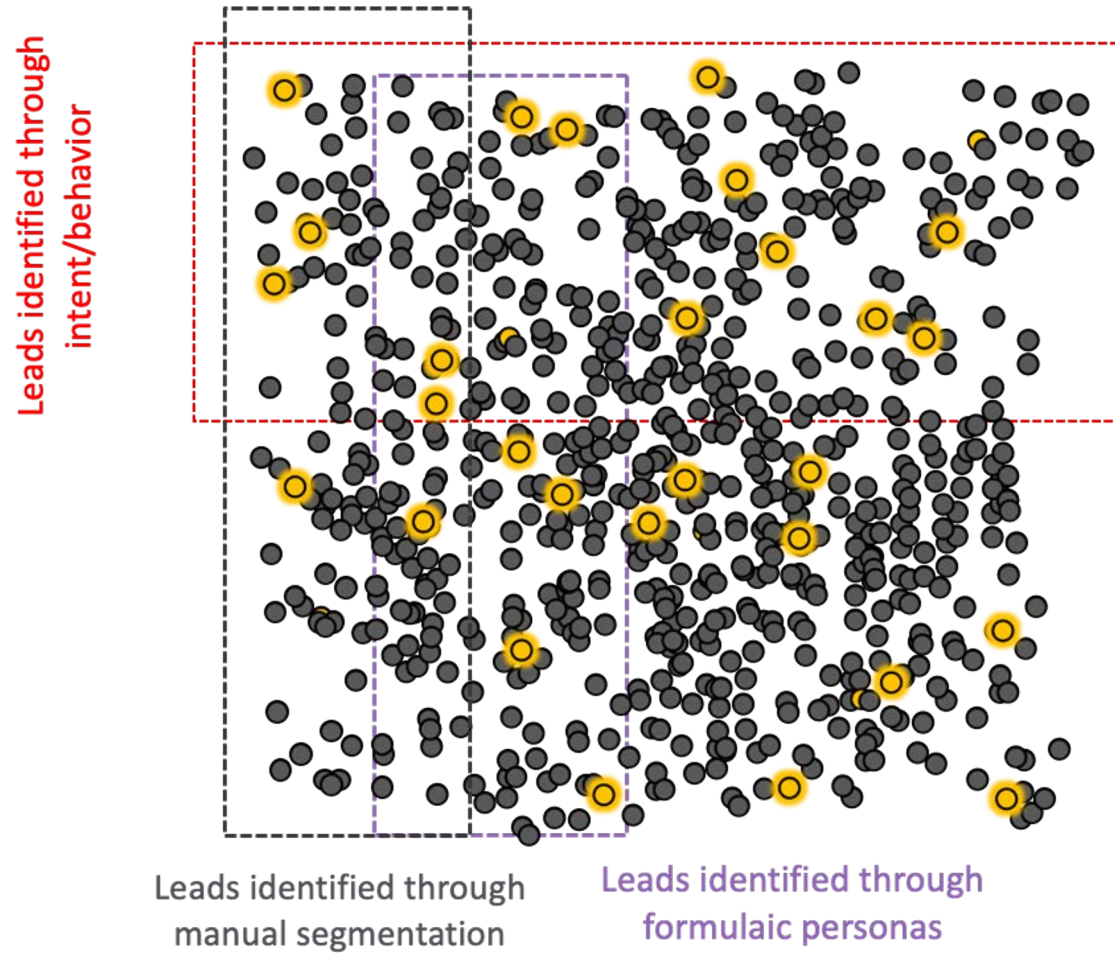
- organizational data (what you bring)
- third party data (what we bring)
- AI/machine learning (what we bring)



boodleAI finds  
your best prospects  
in any list of contacts.

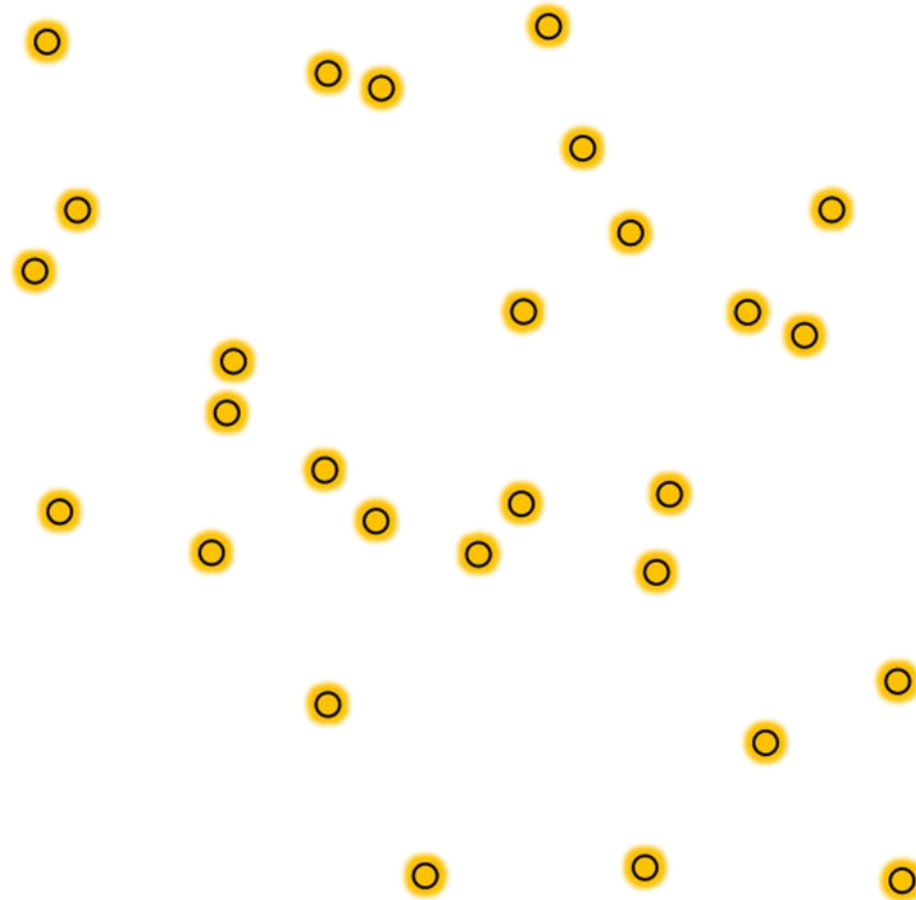


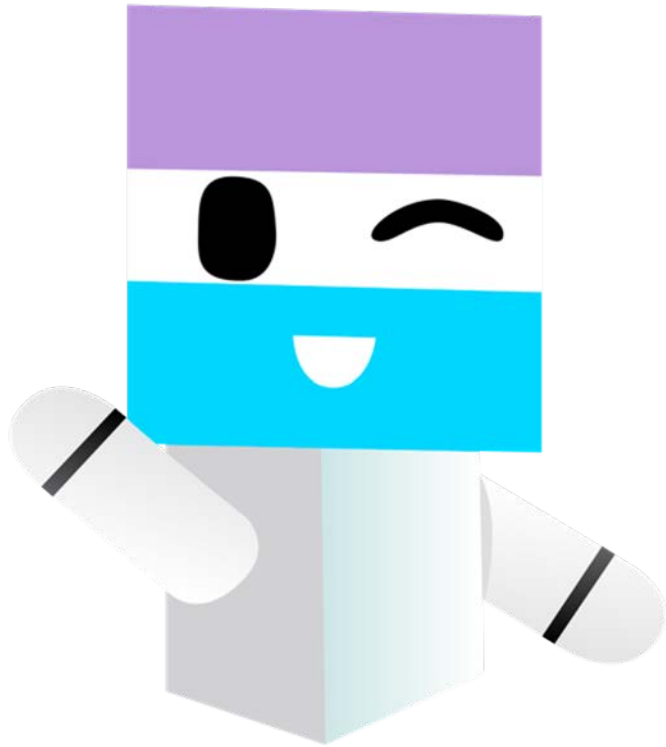
without boodleAI:  
You spend too much time and money  
on prospects that are not a fit (black dots)





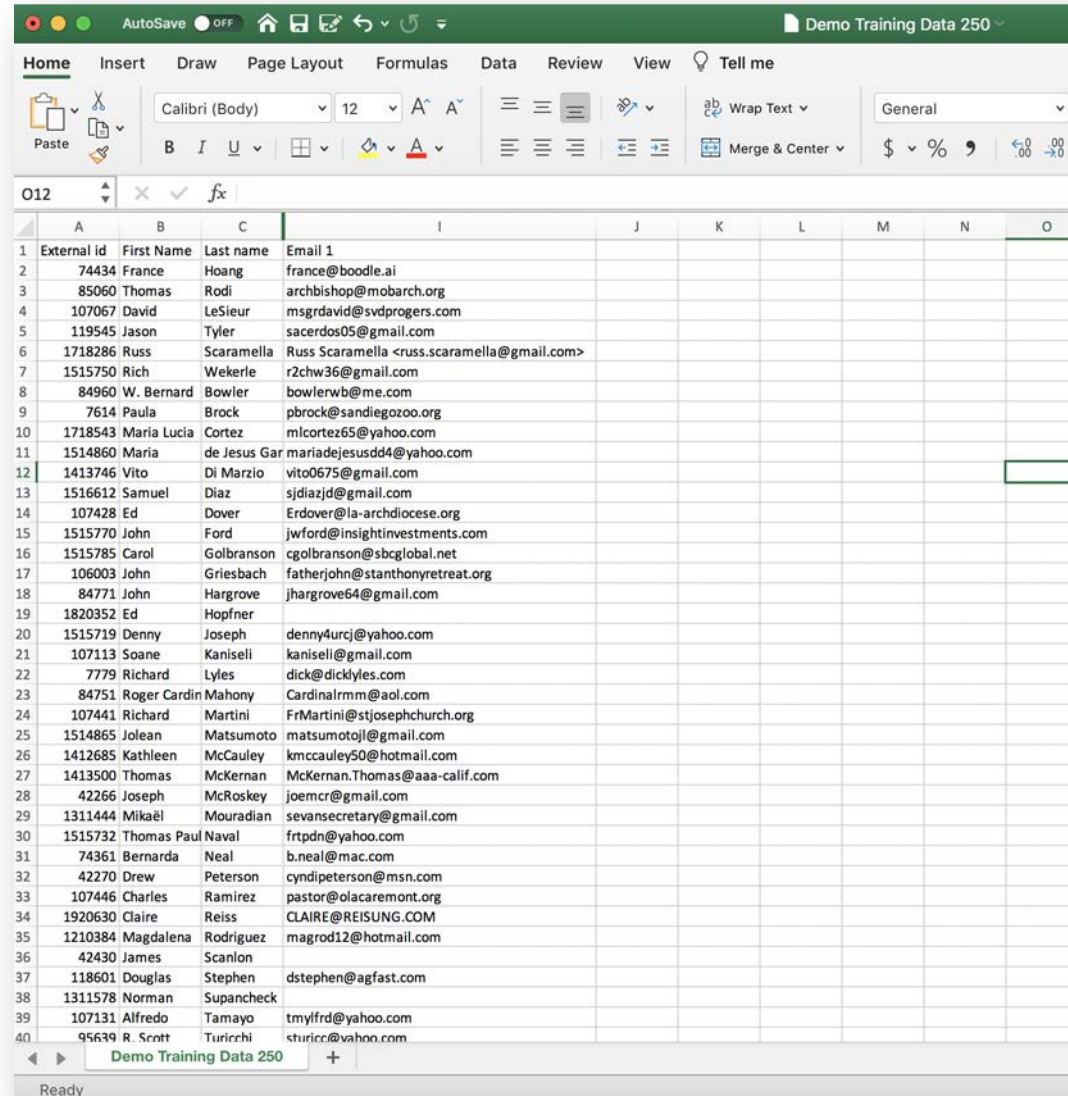
with boodleAI:  
You focus your time and money  
on prospects that are a fit (gold dots)





AI in  
Philanthropic  
Fundraising  
  
(has been  
democratized)

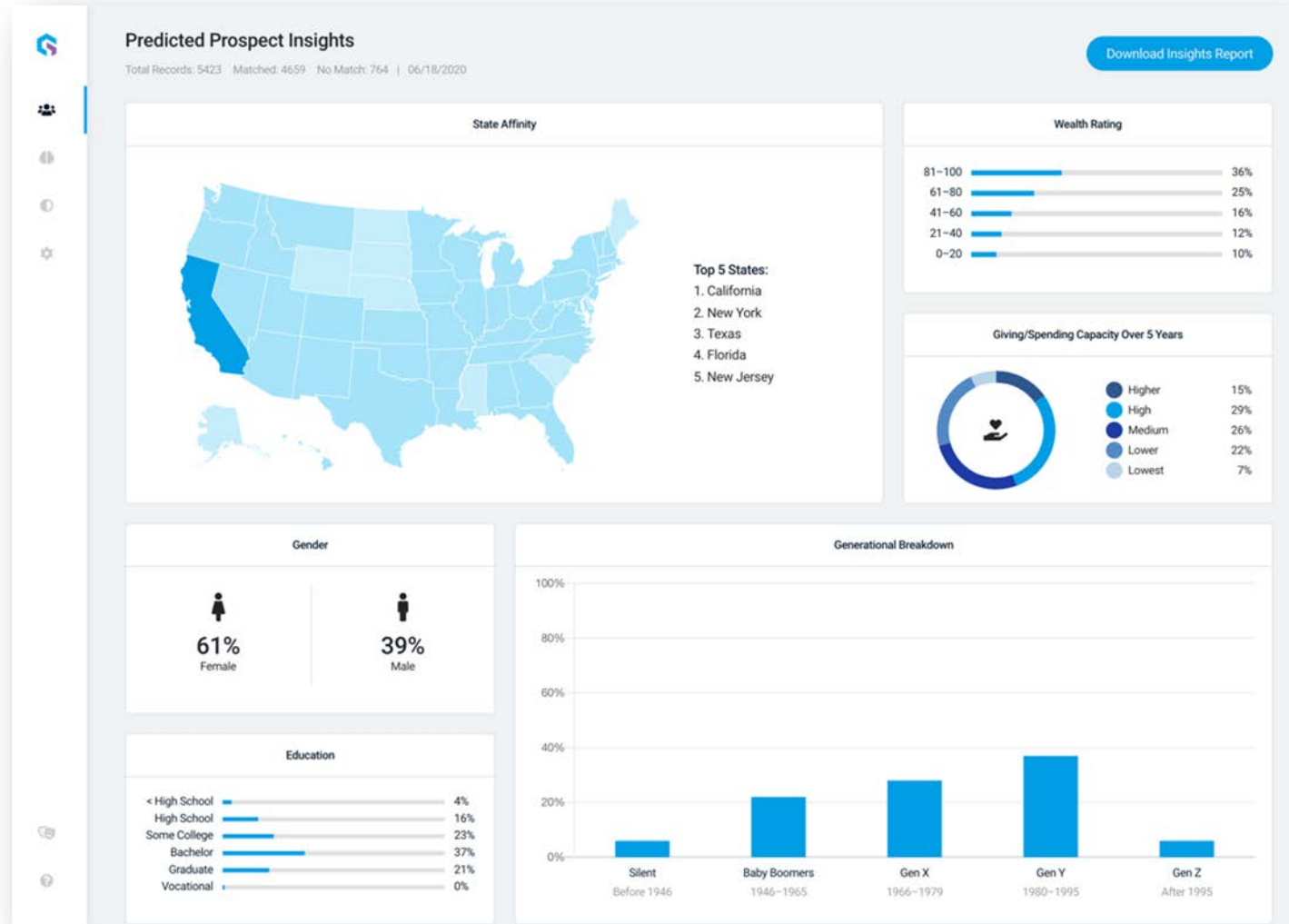
# Yesterday nonprofits had this



The screenshot shows a Microsoft Excel spreadsheet titled "Demo Training Data 250". The spreadsheet has four columns: "External id", "First Name", "Last name", and "Email 1". The data is as follows:

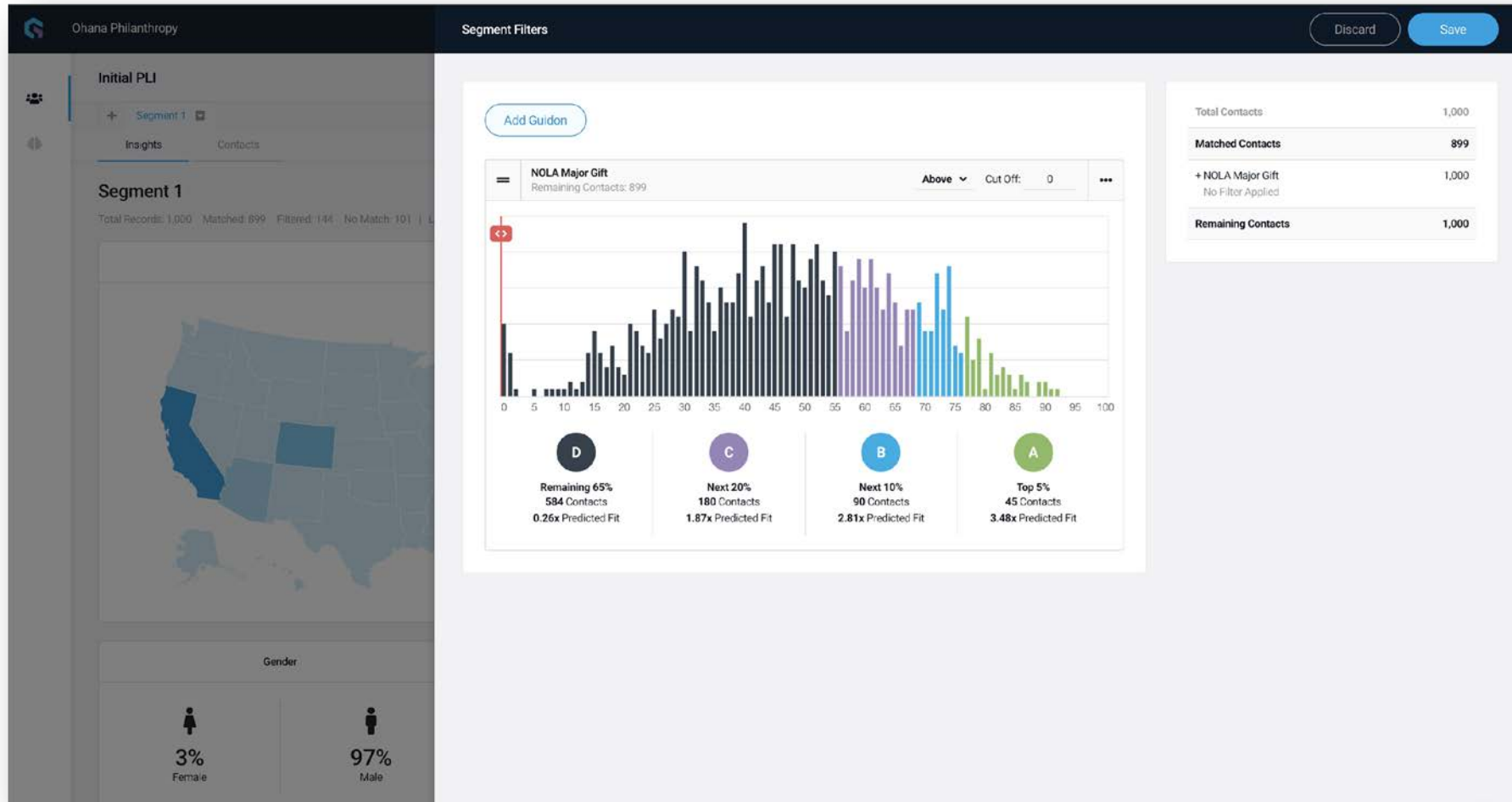
External id	First Name	Last name	Email 1
74434	France	Hoang	france@boodle.ai
85060	Thomas	Rodi	archbishop@mobarch.org
107067	David	LeSieur	msgdavid@svdprogers.com
119545	Jason	Tyler	sacerdos05@gmail.com
1718286	Russ	Scaramella	Russ Scaramella <russ.scaramella@gmail.com>
1515750	Rich	Wekerle	r2chw36@gmail.com
84960	W. Bernard	Bowler	bowlerwb@me.com
7614	Paula	Brock	pbrock@sandiegozoo.org
1718543	Maria Lucia	Cortez	mlcortez65@yahoo.com
1514860	Maria	de Jesus Gar	mariajesusdd4@yahoo.com
1413746	Vito	Di Marzio	vito0675@gmail.com
1516612	Samuel	Diaz	sjdiazjd@gmail.com
107428	Ed	Dover	Erdover@la-archdiocese.org
1515770	John	Ford	jwford@insightinvestments.com
1515785	Carol	Golbranson	cgolbranson@sbglobal.net
106003	John	Griesbach	fatherjohn@stanthonyretreat.org
84771	John	Hargrove	jhargrove64@gmail.com
1820352	Ed	Hopfner	
1515719	Denny	Joseph	denny4urcj@yahoo.com
107113	Soane	Kaniseli	kaniseli@gmail.com
7779	Richard	Lyles	dick@dicklyles.com
84751	Roger Cardin	Mahony	Cardinalrm@aol.com
107441	Richard	Martini	FrMartini@stjosephchurch.org
1514865	Jolean	Matsumoto	matsumotojl@gmail.com
1412685	Kathleen	McCaughey	kmccauley50@hotmail.com
1413500	Thomas	McKernan	McKernan.Thomas@aaa-calif.com
42266	Joseph	McRoskey	joemcr@gmail.com
1311444	Mikaël	Mouradian	sevansecretary@gmail.com
1515732	Thomas Paul	Naval	frtpdn@yahoo.com
74361	Bernarda	Neal	b.neal@mac.com
42270	Drew	Peterson	cyndipeterson@msn.com
107446	Charles	Ramirez	pastor@olacaremont.org
1920630	Claire	Reiss	CLAIRE@REISUNG.COM
1210384	Magdalena	Rodriguez	magrod12@hotmail.com
42430	James	Scanlon	
118601	Douglas	Stephen	dstephen@agfast.com
1311578	Norman	Supancheck	
107131	Alfredo	Tamayo	tmylfrd@yahoo.com
95639	R. Scntt	Turicchi	sturicc@yahoo.com

# Today with AI you can have





# And take it a step further



# And another step

**Ohana Philanthropy**

**Segment Filters** [Discard] [Save]

**Initial PLI**

- + Segment 1
- Insights
- Contacts

**Segment 1**

Total Records: 1,000 | Matched: 899 | Filtered: 144 | No Match: 101

Gender

- 3% Female
- 97% Male

Education

**NOLA Major Gift** Remaining Contacts: 899 Above Cut Off: 0

0 5 10 15 20 25 30 35 40 45 50 55 60 65 70 75 80 85 90 95 100

- D** Remaining 65% 584 Contacts 0.26x Predicted Fit
- C** Next 20% 180 Contacts 1.87x Predicted Fit
- B** Next 10% 90 Contacts 2.81x Predicted Fit
- A** Top 5% 45 Contacts 3.48x Predicted Fit

**Wealth Rating** Remaining Contacts: 899 Above Cut Off: 0

0 5 10 15 20 25 30 35 40 45 50 55 60 65 70 75 80 85 90 95 100

- D** Remaining 65% 584 Contacts
- C** Next 20% 180 Contacts
- B** Next 10% 90 Contacts
- A** Top 5% 45 Contacts

Total Contacts	1,000
Matched Contacts	899
+ NOLA Major Gift	1,000
No Filter Applied	
+ Wealth Rating	1,000
No Filter Applied	
Remaining Contacts	1,000

# And another step

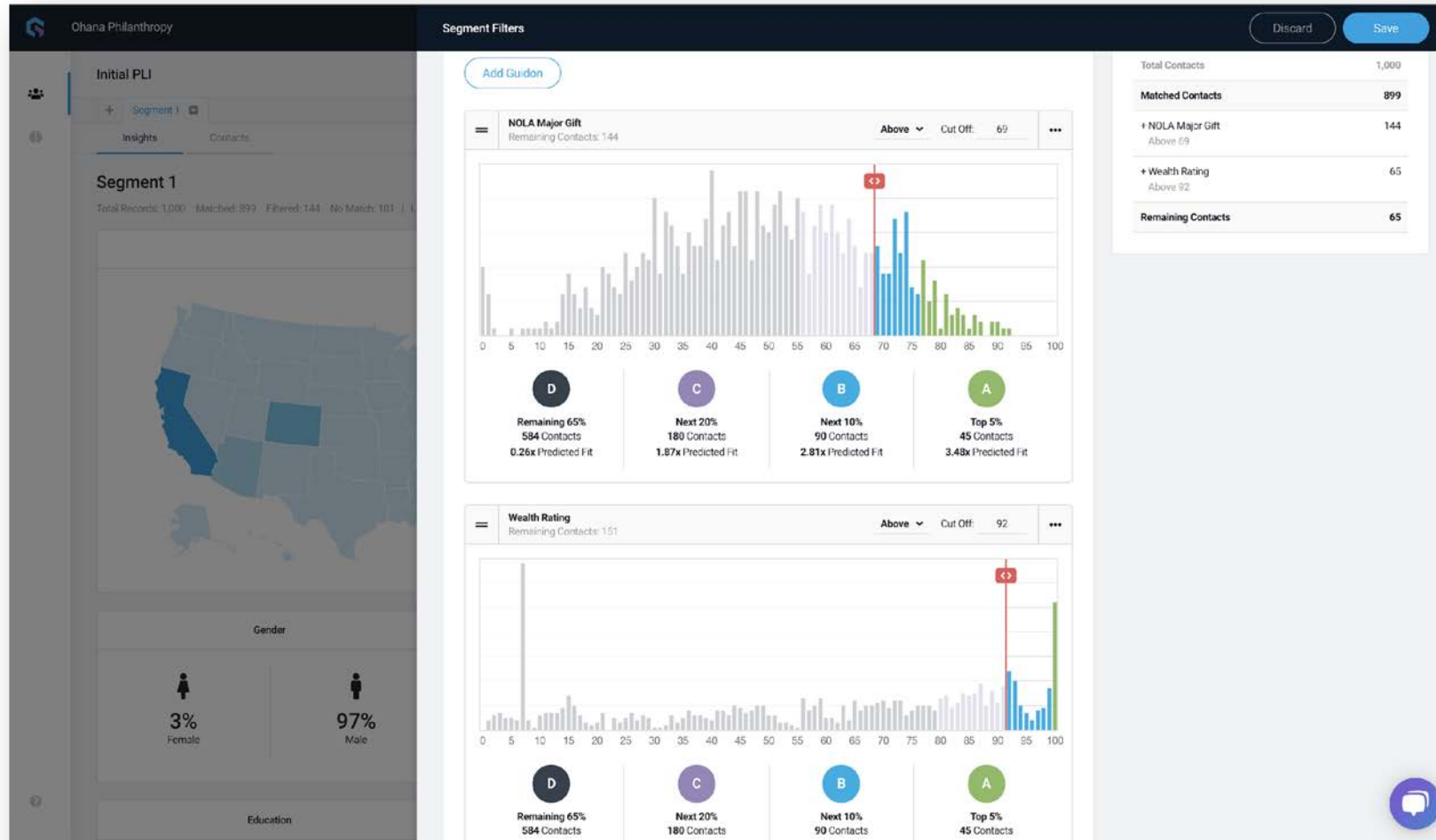
The screenshot displays a software interface for 'Chana Philanthropy' with a 'Segment Filters' section. On the left, a sidebar shows 'Initial PLI' and 'Segment 1' with a map of the United States. The main area features two histograms: 'NOLA Major Gift' and 'Wealth Rating'. The 'NOLA Major Gift' histogram has a red vertical line at a cut-off of 69, with a 'Discard' button and a 'Save' button above it. Below the histograms are four performance metrics labeled D, C, B, and A. A summary table on the right lists contact counts for various filters.

Filter	Count
Total Contacts	1,000
Matched Contacts	899
+ NOLA Major Gift (Above 69)	144
+ Wealth Rating (No Filter Applied)	144
Remaining Contacts	144

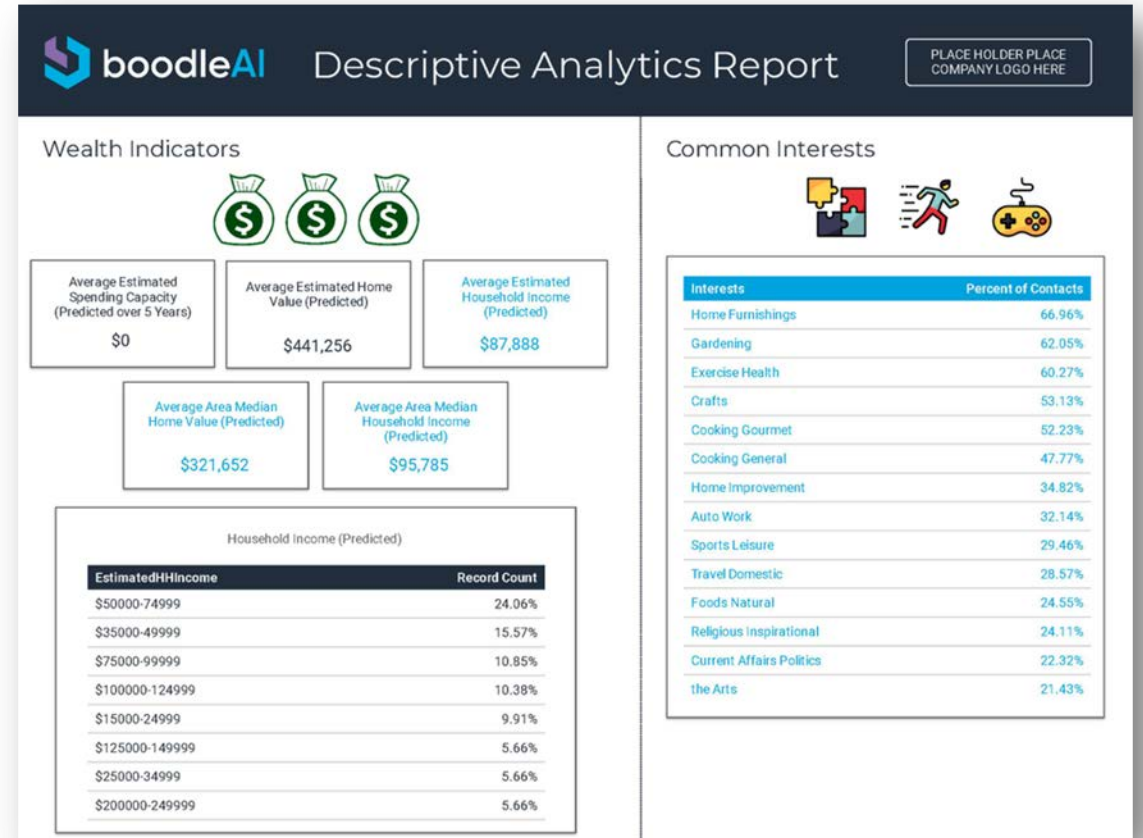
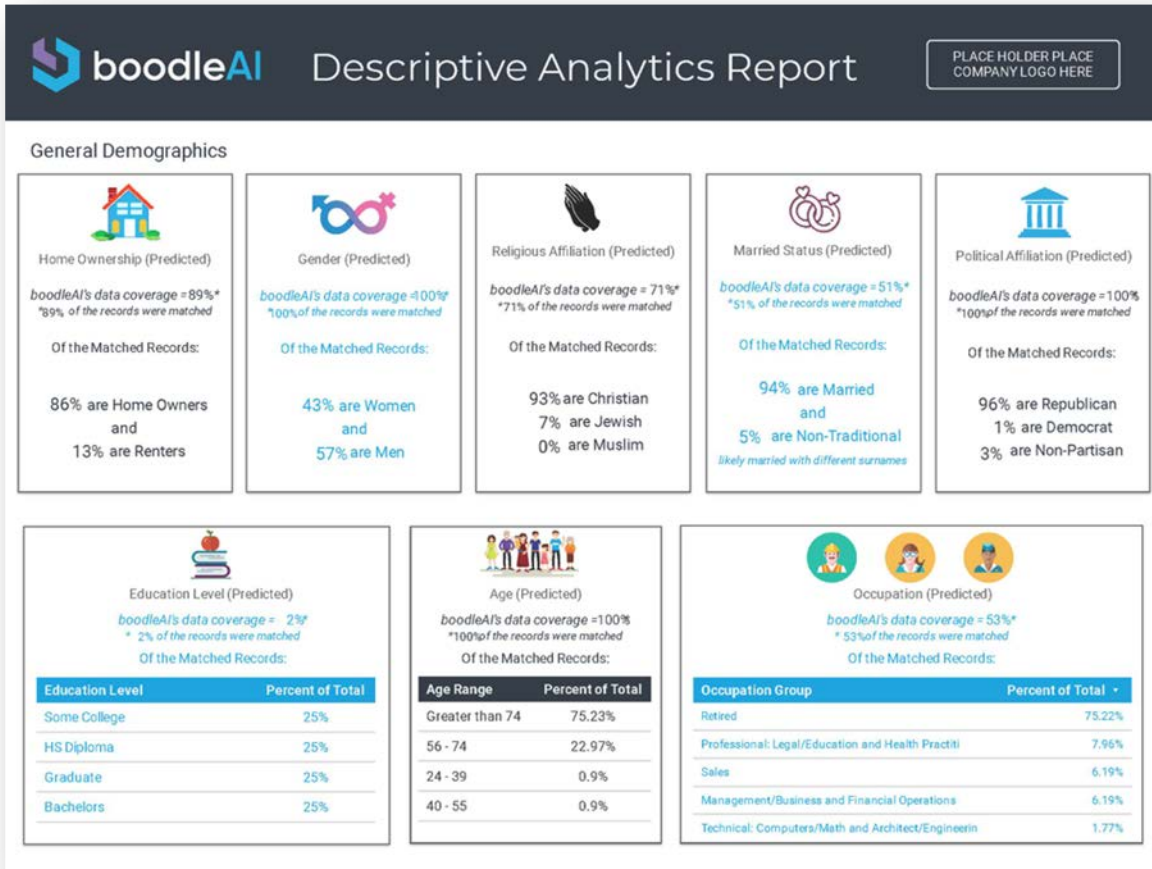
Segment	Remaining	Contacts	Predicted Fit
D	Remaining 65%	584	0.26x
C	Next 20%	180	1.87x
B	Next 10%	90	2.81x
A	Top 5%	45	3.48x

# One easy step for AI, one giant step development teams



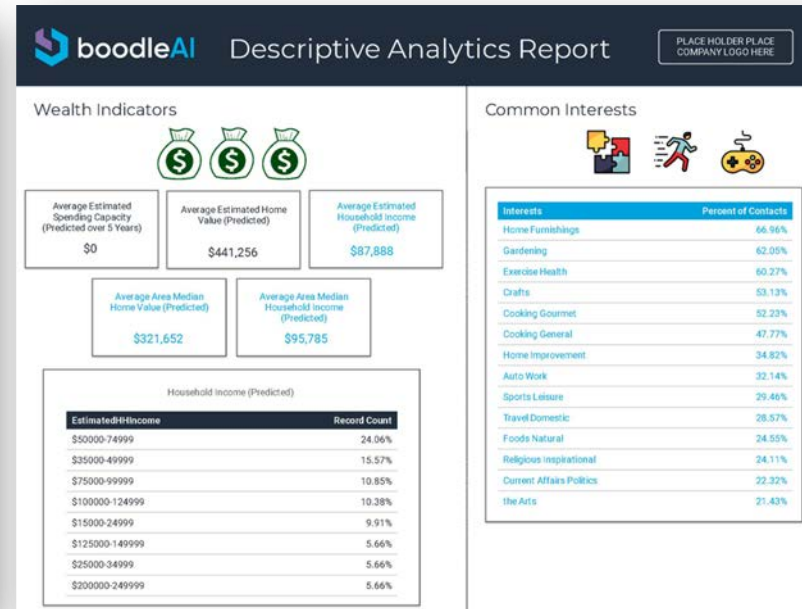
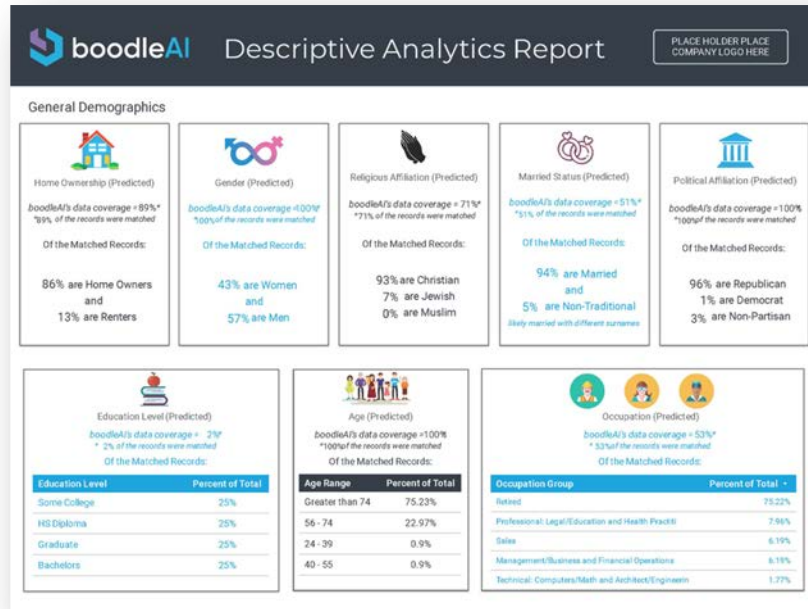


# Descriptive Analytics Reports



High-level insights on any contact list you want to learn more about.

# Descriptive Analytics Reports



All you need is first name, last name, and e-mail address of your prospects.

How can your organization use this?

With Descriptive Analytics Reports you can:

- Create Ideal Customer/Donor/Investor profiles
- Refine parameters for online ad buys
- Identify exact profiles for list purchases
- Create high level overviews to better inform intern discussions

# How AI Can Enhance Your Event



## “Taylor” your ask

- Prioritize major gift Donors
- Identify most likely auction participants
- Identify potential new lifetime donors



## Cater your auction to your attendees ask

- Identify common interests to drive auction items
- Pre-identify attendees to specific auction items
- Identify potential major bidders and have the ability to alert them during the event



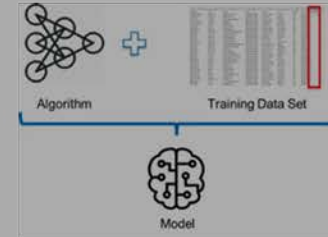
## Post auction follow up

- Identify potential new lifetime donors from auction bidders
- Use Auction data to enhance current models for future auctions (machine learning)

## Data:



## Algorithms and Models:



## Tools/Infrastructure:



## Computing Power:





QUESTIONS?

Now is our time  
to hear from you!

**Raise**  
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TRY IT OUT!

# Interactive Activity

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