



Data-Driven Storytelling: A Powerful Tool for Fundraising Success

Alex Kasavin

Tech for Social Impact, Microsoft

Matthew Hayto,

Dioptra Product Lead, IRC

Dan Lammot

threshold.world & b.world



What we'll discuss today



Introduction



Every constituent has a story



Making data work for us



Sharing your story



Q&A

Introduction

Alex Kasavin



Senior product manager at Microsoft working on data and AI solutions for nonprofits



Fostered 13 dogs during the pandemic; currently starting agility training with my own pup

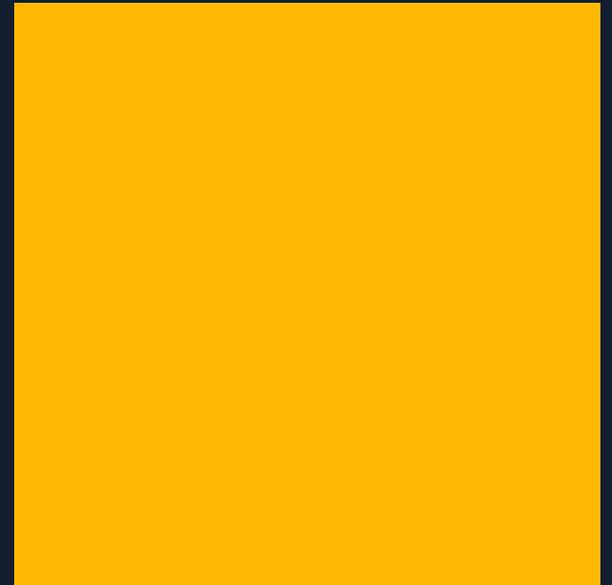
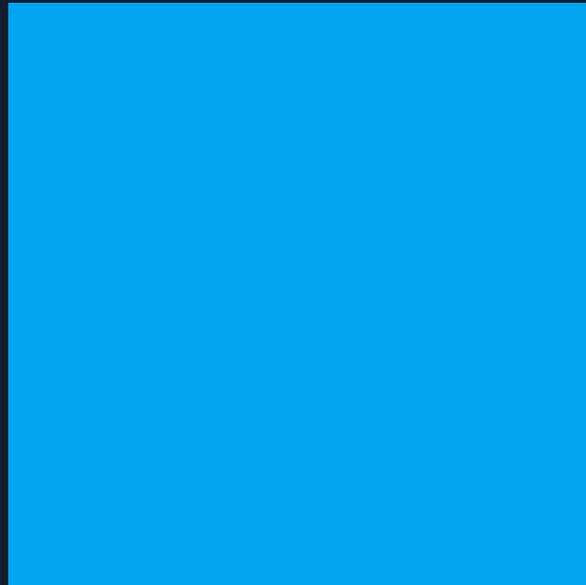
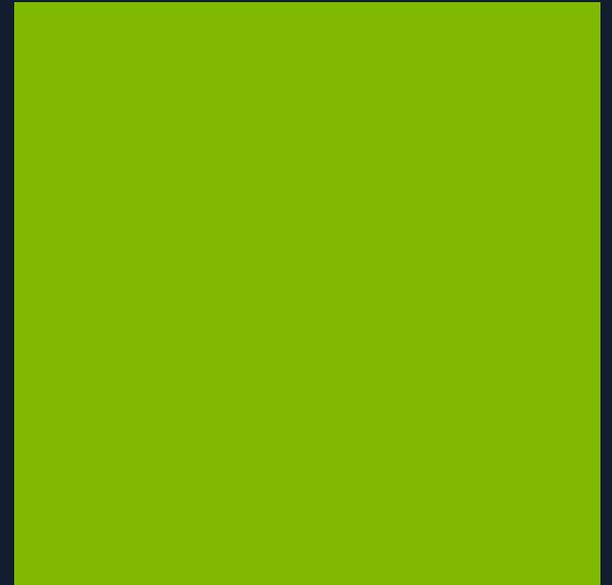


Born in Russia, based in New York City



Microsoft mission

Empower every person
and every organization on
the planet to achieve more.



TECH FOR SOCIAL IMPACT

Empower every nonprofit and mission driven organization with Microsoft technology to accelerate social good



In fiscal year 2022, Microsoft provided

Supporting
nonprofits is a
part of our DNA



\$3.2 billion

In grants or discounted software and services



\$330 million

Donated by Microsoft employees (including company match) to support nonprofits around the world



325,000+

Nonprofit organizations equipped with modern, secure, and scalable Microsoft cloud solutions

Matthew Hayto



Product lead for Dioptra, building tools for nonprofits to scale their impact



Enjoys going to the top of high places



Canadian, living and working in northern California



Dan Lammot



CEO & Co-founder of threshold.world & b.world
15 years at the intersection of nonprofits & tech



Ocean advocate and avid surfer



Lives and works in Puerto Rico



threshold
.world



threshold.world

Mission: Leverage technology to enable all nonprofits and social impact organizations to do more good.

Founded 2018
Headquarters in Puerto Rico

Fundraising
Grant Management
Case Management
Program Management

+

Microsoft Dynamics 365
Microsoft Cloud for Nonprofit

Human Centered
AI Powered

Program Design
Impact Measurement
Project Management
Storytelling

Common challenges that prevent resonant storytelling

Today's nonprofit challenges (& opportunities)



Staffing

33% of nonprofits report that 1 in 5 job openings are vacant¹



Donor retention

Donor retention fell 6.2% and total donors fell 5.6%²



Personalized communication

77% of nonprofits believe personalizing donor communication is critical³



Online giving growth

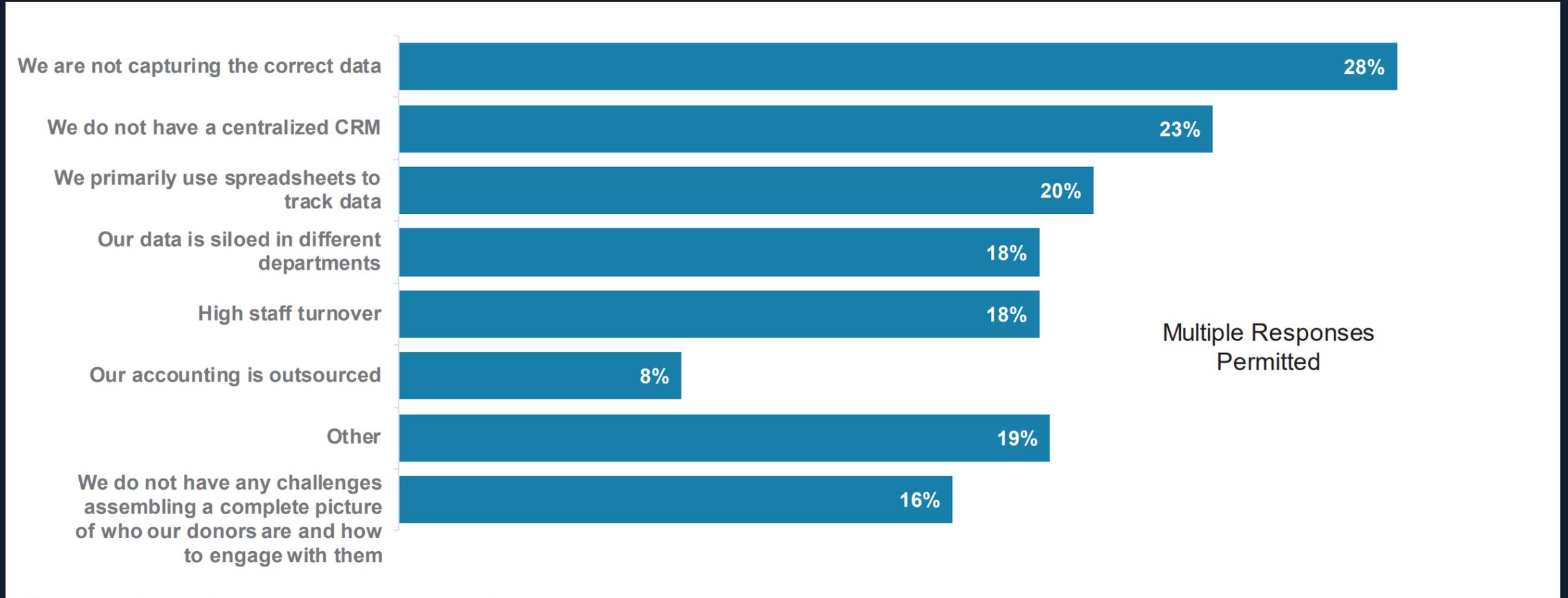
Since 2021, online giving has grown 12% YoY⁴



Increased time efficiency

Workers globally spend 35% of their time on repetitive tasks⁵

Donor data and engagement challenges



Making data work for us

The old story

- Overhead
 - **95%** of your donation goes toward treating children for malnutrition
 - **5%** overhead cost

The old story

- Overhead
 - **95%** of your donation goes toward treating children for malnutrition
 - **5%** overhead cost
- 5% is the limit we can spend on research, innovation, and growth
- Our impact is limited

The new story

- Impact
 - Your donation has enabled us to treat 150 children for malnutrition

The new story

- Impact
 - Your donation has enabled us to treat 150 children for malnutrition
- The goal is **impact**
- Nonprofits should invest however they need to maximize **impact**

The International Rescue Committee

- Founded in 1933
- **50** countries and **28** US cities
- Help people affected by humanitarian crises
- We reached **33 million** people in 2022

Cost data

- **Donations** – coming from donors who trust our work
- **Impact** – coming from expert staff
- Unclear how the two are connected – we need cost data

Dioptra

A tool to run fast, consistent cost analysis

Dioptra

Dashboard Program Design Lessons Administration Help Matthew Hayto (IRC) | Logout

Download PDF Edit Analysis Continue Sub-Activity Analysis

Matthew's Cash analysis

Unconditional Cash Transfer

Date Range Jan. 1, 2021 - Dec. 31, 2021
Country Colombia
Grants GO406
Value of Cash Transferred 8,784,582.45
Currency US dollars
 Created by Matthew Hayto (IRC) on Oct. 26, 2023

Cost Efficiency

Cost per Cash Transferred

\$0.29

Including Direct Project Costs (\$0.08), Direct Shared Costs and Indirect Costs (\$0.21) ?

\$0.08 \$0.21

Comparison to Similar Programs ?

Country	Cost per Cash Transferred (Direct Project Costs only)	Cost per Cash Transferred (Inclu Direct Project Costs, Direct Shared Costs, Indirect Costs)
Philippines	\$0.14	\$0.24
Iraq	\$0.16	\$0.28
This Program	\$0.08	\$0.29
Jordan	\$0.28	\$0.41
Iraq	\$0.40	\$0.62
Lebanon	\$0.55	\$0.86
Mail	\$0.61	\$0.86
Chad	\$1.05	\$1.99
Niger	\$1.32	\$2.01

Strategies ?

Economies of scale

Efficiency Driver

Increasing the number of dollars distributed--by targeting more households, or giving more months of transfers--makes programs more cost-efficient, because "fixed" costs like program management and community assessments get spread over more transfers. [More info.](#)

Strategy to Improve Cost-Efficiency

If your program serves 300 or fewer households, increase that number to get "economies of scale." Make best use of investments in community-level assessments and travel by serving all eligible households in that area before targeting new areas.

Taking dollar value into account

Efficiency Driver

The dollar value of transfers has an enormous impact on cost-efficiency--when we transfer more dollars to people (e.g. in contexts where basic needs cost more), then the costs of delivery simply get spread over more dollars of transfer.

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- Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.
- Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur.

Strategy to Improve Cost-Efficiency

Don't shift the value of transfers to improve cost efficiency--this should be based on local needs. Instead, take transfer size into account when presenting results to donors, and ensure that they compare only to programs with similar sized transfers.

1. Lorem ipsum dolor sit amet, consectetur adipiscing elit, sed do eiusmod tempor incididunt ut labore et dolore magna aliqua.
2. Ut enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat.
3. Duis aute irure dolor in reprehenderit in voluptate velit esse cillum dolore eu fugiat nulla pariatur.

Dioptra

Matthew's Cash analysis | Unconditional Cash Transfer < Back Next >

How much did each cost item contribute to Unconditional Cash Transfer?

This step allows you to indicate how much each cost item was used for the activity being analyzed, compared to the other activities it may also support this grant (eg. a Health Manager may work on malnutrition treatment and family planning in this grant). What % of each cost item amount charged to grant was used for the activity being analyzed? This is different from the % of each cost item allocated to this grant.

[More help](#)
[Edit](#)

Enter keyword

Economic Recovery and Development 34 Cost Items to allocate

National Staff ? 14 Cost Items Allocated \$415,550.75

Travel & Transport ? 4 Cost Items Allocated

4 Cost Items	Site	Sector Code	Account Code Description	\$11,935.54	Assign Allocation % ?
Fuel Vehicle CUC	COCUC	Program	Travel & Transport	\$767.32	<input type="button" value="Apply to all"/> ? <input type="text" value="100.00"/> <input type="button" value="Add note"/>
Local Travel - ERD - BOG	COBOG	Program	Travel & Transport	\$4,037.88	<input type="text" value="100.00"/> <input type="button" value="Add note"/>
Local Travel - ERD - CUC	COCUC	Program	Travel & Transport	\$4,377.11	<input type="text" value="100.00"/> <input type="button" value="Add note"/>
Local Travel - ERD - MED	COMED	Program	Travel & Transport	\$2,753.23	<input type="text" value="100.00"/> <input type="button" value="Add note"/>

Materials & Activities ? 15 Cost Items Allocated \$9,040,998.69

Assets & Equipment ? 1 Cost Items Allocated \$27,713.65

Next >

Matthew's Cash analysis | Unconditional Cash Transfer < Back Next >

Did these categories contribute to Unconditional Cash Transfer?

Thanks to the categorization you did in the previous steps, this step allows you to select only the Sectors and Categories that are relevant to impact the activity being analyzed.

In subsequent steps, you will no longer need to deal with Sectors or Categories that are not relevant to the activity being analyzed.

Tip: Remember to click Save before proceeding to the next Sector.

[More help](#)
[Edit](#)

Economic Recovery and Development

National Staff ? 14 Cost Items \$415,550.75 Yes No

Travel & Transport ? 4 Cost Items Yes No

4 Cost Items	Site	Account Code Description	\$11,935.54
Fuel Vehicle CUC	COCUC	Travel & Transport	\$767.32
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Materials & Activities ? 15 Cost Items \$9,040,998.69 Yes No

Assets & Equipment ? 1 Cost Items \$27,713.65 Yes No

Cost data

Allows us to do two things

1. **Compare** cost efficiency against similar programs
2. **Identify** biggest drivers for cost, and avoid them

Cost data

This helps NGOs like us

1. **Increase our impact** - the IRC has doubled cost efficiency in some areas, reaching about **400,000 more** people with services
2. **Stop doing ineffective work** – the IRC has wound down a vocational training program that was highly inefficient

Cost data

This helps donors

1. Donors get better visibility into the impact of their funding
2. Donations go to the places driving the most impact
3. Nonprofits gain control over how donations are spent

Critical mass

If just a few organizations use cost data to make decisions, we can change how nonprofit funding works.

Dioptra is led by **9** organizations with **\$6 billion** in annual budget



Sharing your story



Fundraising

Impact

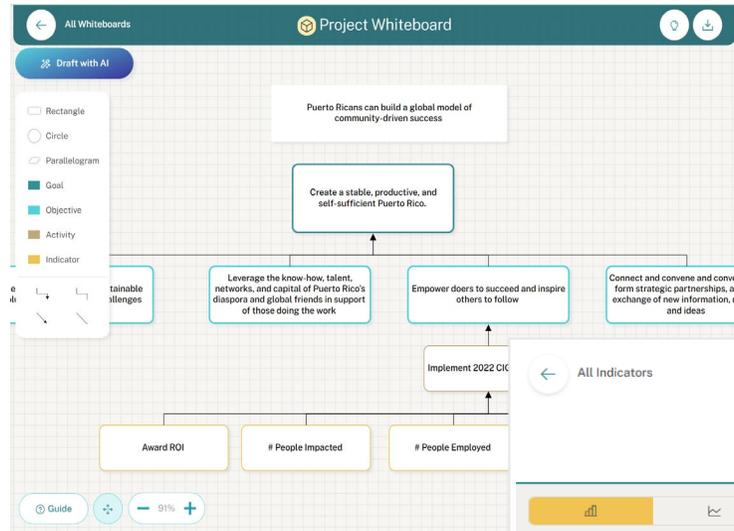


meet b.world

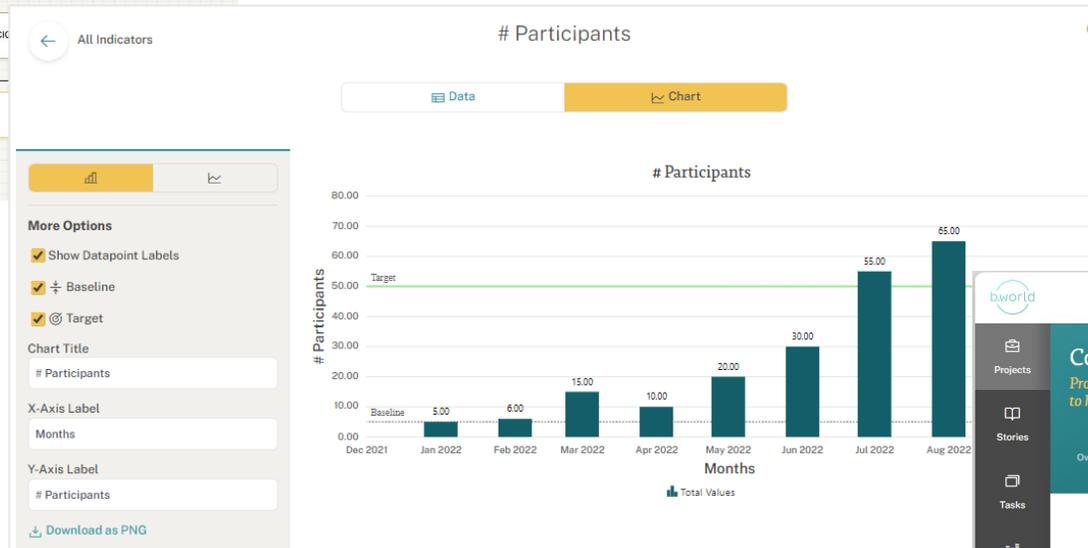
Measure impact. Visualize results.
Share your story. It's just that simple.



Project Design



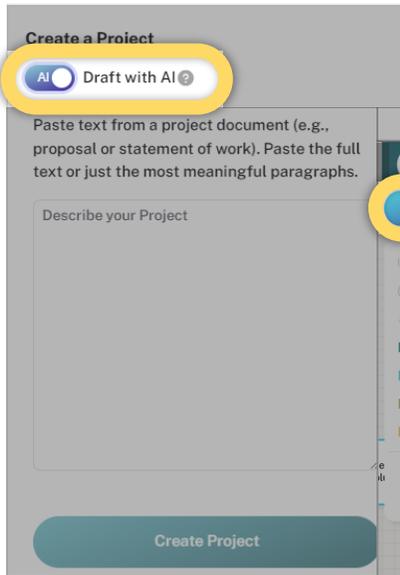
Impact Measurement



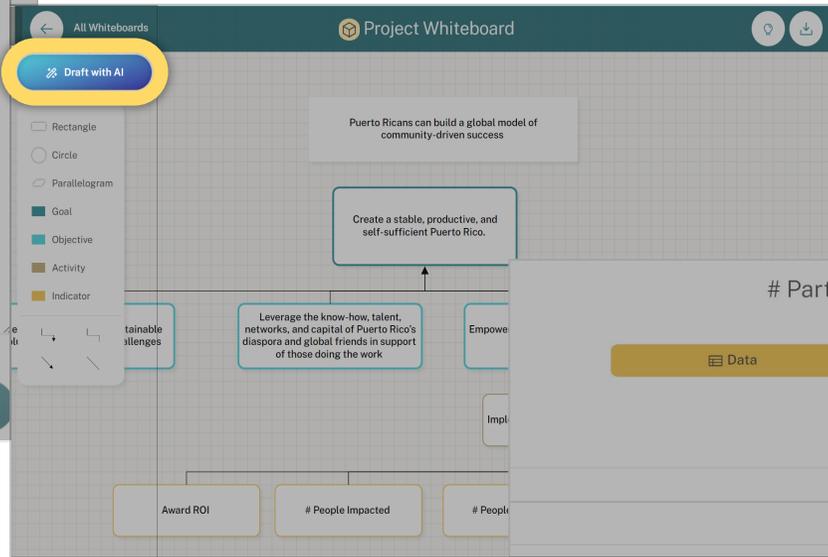
Storytelling

A **streamlined** approach to managing the social impact project lifecycle

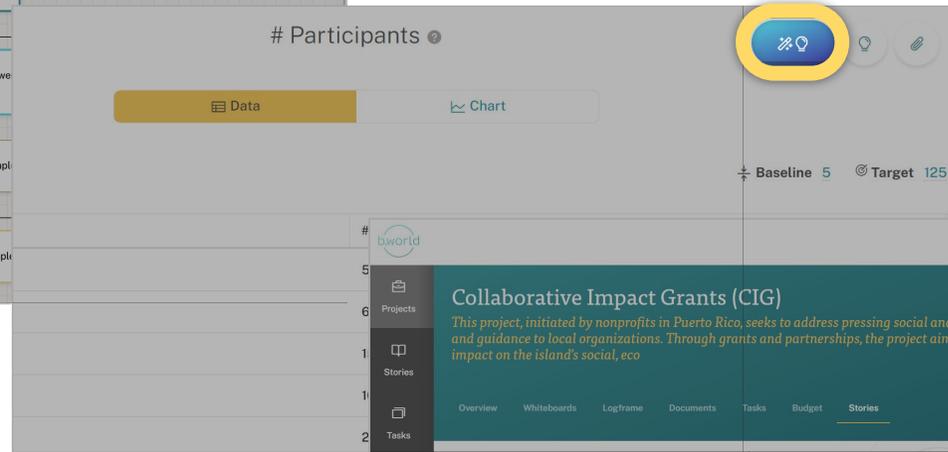
Project Creation



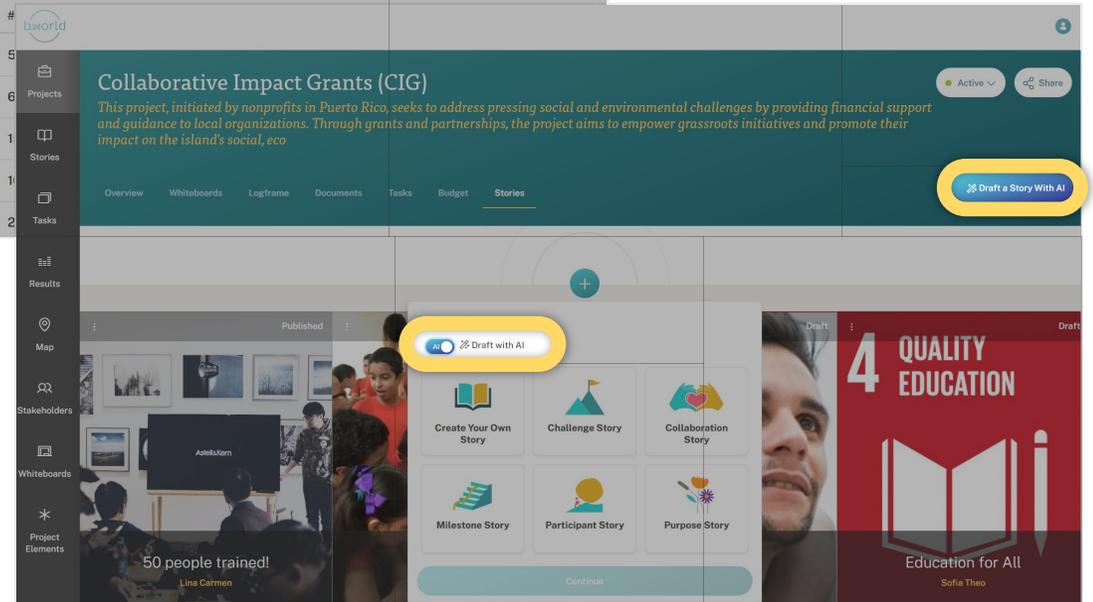
Project Design



Impact Measurement



Storytelling



An **AI-assisted** approach to managing the social impact project lifecycle

Affordable solution with easy onboarding

- Includes 30-day free trial
- Significantly less expensive than competitor solutions
- No hidden setup or installation fees
- Designed to be fully self-service
- Minutes from registering to using



t wo pack

\$90/month

- 2 users included
- \$45 per additional user
- up to 4 users

Start a free trial



team pack

\$200/month

- 5 users included
- \$40 per additional user
- up to 24 users

Start a free trial



program pack

\$900/month

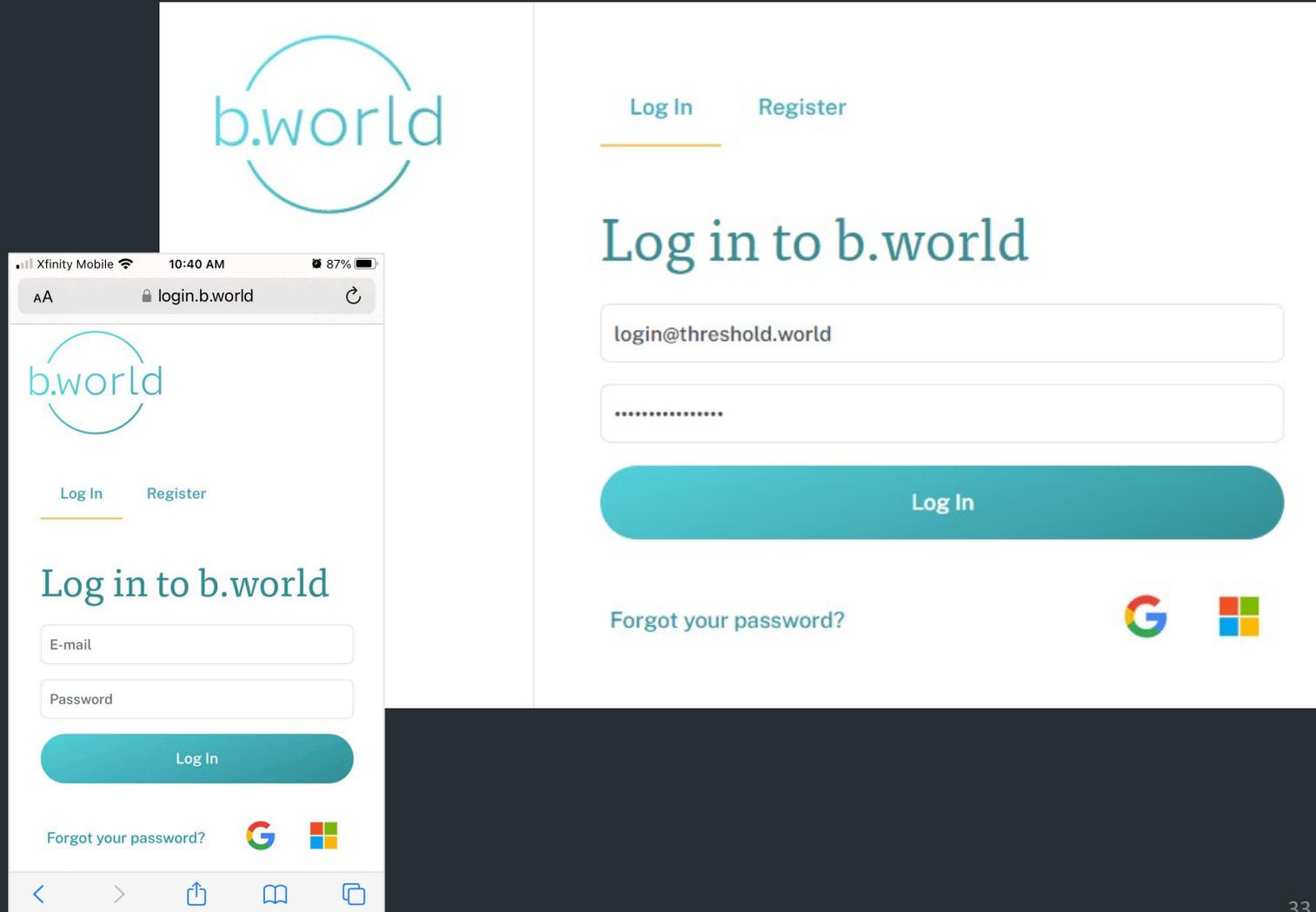
- 25 users included
- \$36 per additional user

Start a free trial

A **cost-effective** approach to managing the social impact project lifecycle

Log in on desktop or mobile

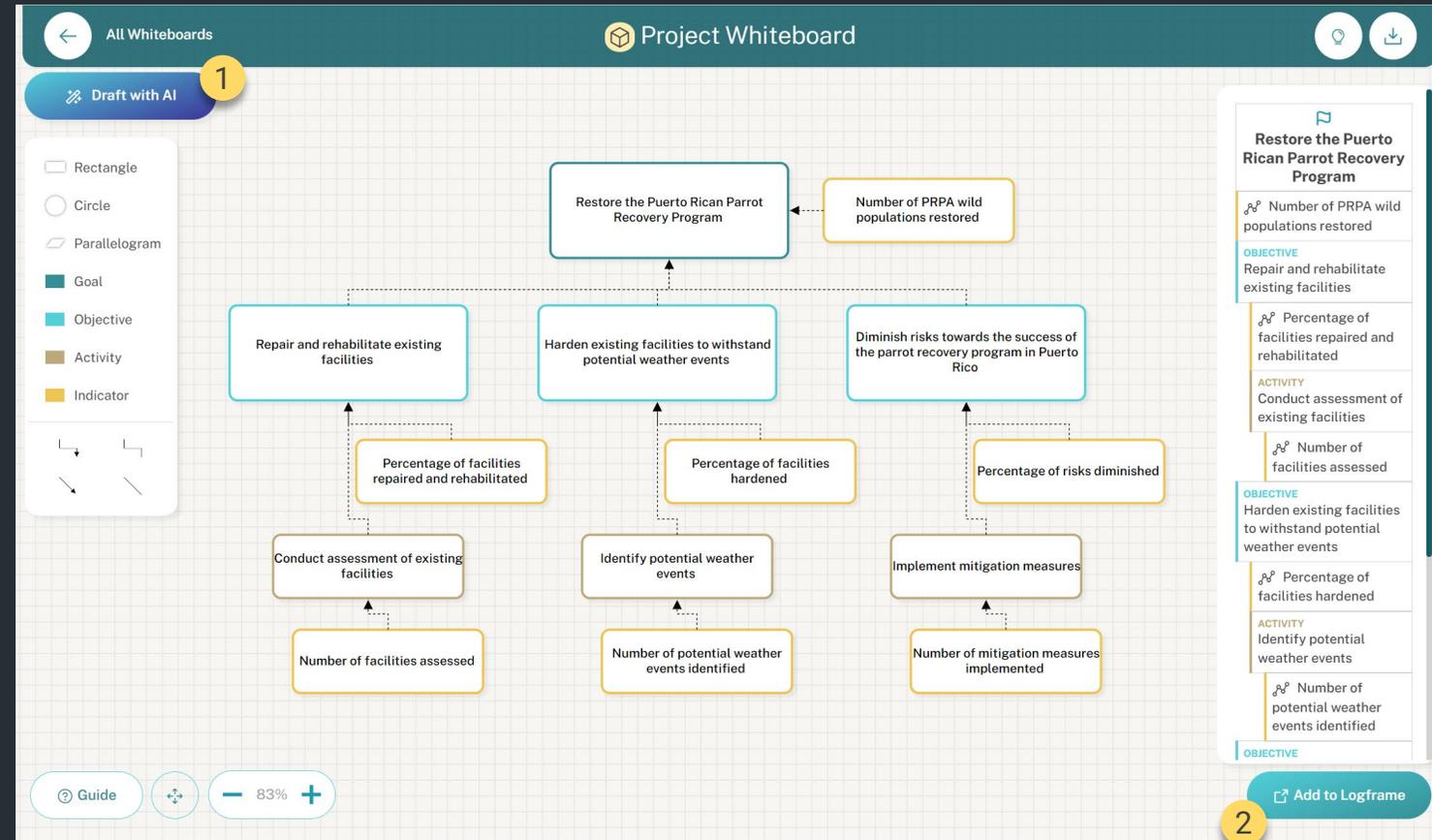
Multi-tenant software-as-a-service (SaaS) platform built on scalable, secure Microsoft Azure



Project Framework Creation

Collaboratively design a project framework using generative AI (1) and/or your own creative thinking.

Automatically convert this visual framework to a logframe (2) to flesh out indicators and begin collecting data.



Project Management

Capture key details that will remain at the core throughout life of the project: date range, challenge statement, proposed solution, locations and stakeholders.

Logframe

Develop a logframe (i.e., logic model) with Goals, Objectives, and Activities. Track data at all levels with Indicators to measure project success from outputs to outcomes to impact.

Read to Succeed Ghana (R2SG)
A comprehensive project to advance early grade reading outcomes in Western Ghana.

Overview Whiteboards **Logframe** Documents Tasks Budget Stories

Goals
 Equitably Advance Early Grade Reading Outcomes Improve lives and livelihoods

Objective Indicator Insights

Percentage of Grade 3 Students that Read with Comprehension

Objective 1
 Adoption and Application of Evidence-Based Literacy Pedagogy in Schools

- # of teachers consistently using evidence-based literacy pedagogy
- Early Adoption Metric
- Mid-term adoption metric

Teacher Training
 1/1/2021 – 12/31/2022

- # Teachers Trained
- 4.1.1 - Proportion of children and young people (a) in grades 2/3; (b) at the end of primary; and (c) at the end of lower secondary achieving at least a minimum proficie...

Creation of Local Language Reading Materials
 1/1/2021 – 12/31/2022

- 4.4.1 - Proportion of youth and adults with information and communications technology (ICT) skills, by type of skill
- Number of Local Language Titles Published

Indicator Setup

Create your own indicators or align to the United Nations Sustainable Development Goals (SDGs) to track results and measure project success.

✕
Indicator Setup

Mid-term adoption metric

* Required

Indicator Overview

Definition

Data Collection Method

Data Collection

* Reporting Frequency ? Weekly

* What type of data is being collected for this indicator? ? * Unit of Measurement ?

* How will you enter your result values for each reporting period? ?

Incremental Cumulative

Measurement Properties Copy from... ▾

Stakeholders

Sex

Age ?

Location ?

Custom Dimensions ?

Age Group

15-19
20-29
30-39
40-49
50+

Application Status

This custom indicator will not be listed under Project Elements and will not be available for use on other projects.

Complete Setup
!

Logframe: Indicator Data Table

Keep track of all results for each indicator in a neatly organized table, whereby the platform auto-generates all rows and columns based upon the data collection timeframe, reporting frequency, and dimensions/disaggregates that the user has entered

Read to Succeed Ghana (R2SG) Active ▼ Share

A comprehensive project to advance early grade reading outcomes in Western Ghana.

Overview Whiteboards Logframe Documents Tasks Budget Stories Draft a Story With AI

← All Indicators # Teachers Trained

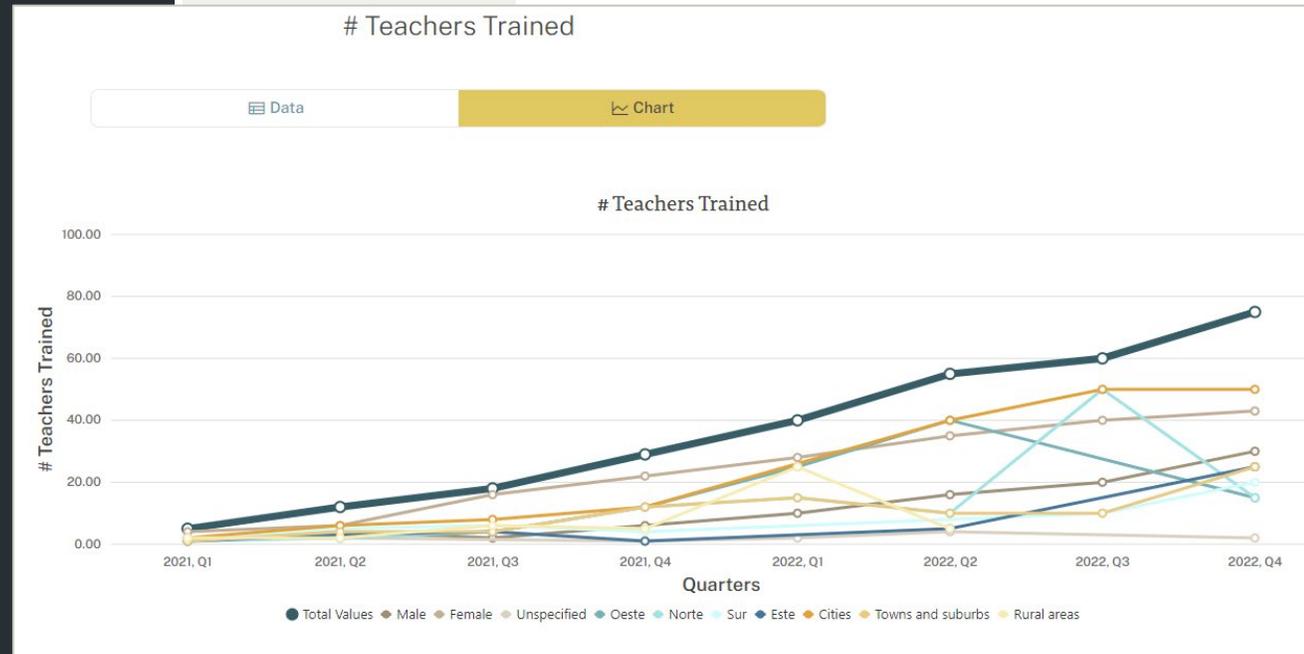
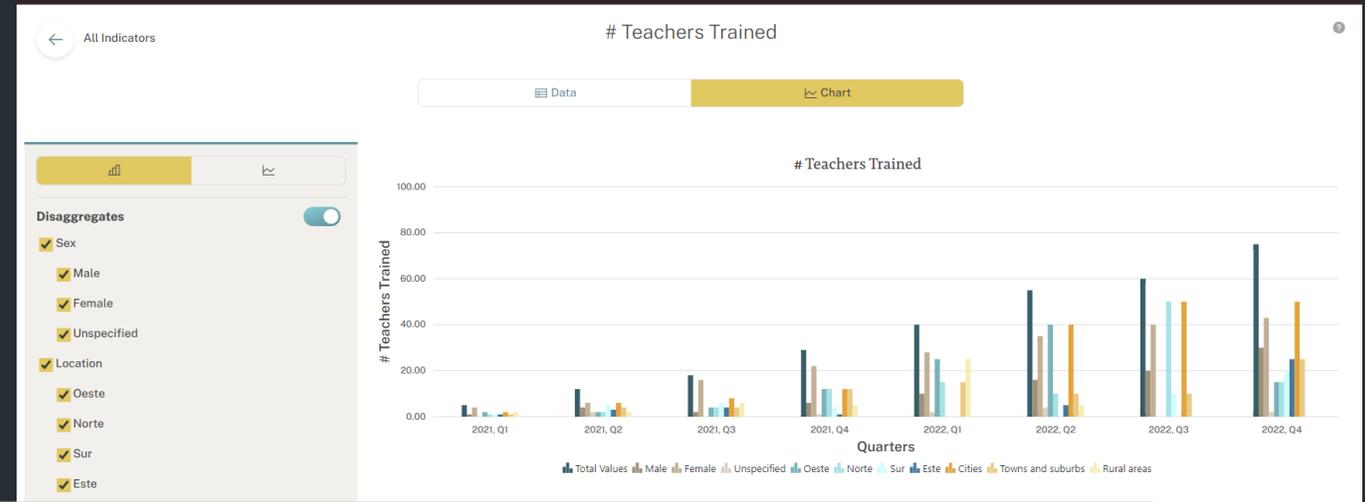
Data
Chart

Data Collection Timeframe
📅 Jan. 01 2021-Dec. 31 2022 📊 Baseline 0 🎯 Target 75

Reporting Period	# Teachers Trained	Sex			Location				Location		
		Male	Female	Unspecified	Oeste	Norte	Sur	Este	Cities	Towns and subur...	Rural areas
Q1 21	5	1	4		2	1	1	1	2	1	2
Q2 21	12	4	6	2	2	2	5	3	6	4	2
Q3 21	18	2	16		4	4	6	4	8	4	6
Q4 21	29	6	22	1	12	12	4	1	12	12	5
Q1 22	40	10	28	2	25	15			0	15	25
Q2 22	55	16	35	4	40	10		5	40	10	5
Q3 22	60	20	40		0	50	10		50	10	
Q4 22	75	30	43	2	15	15	20	25	50	25	

Logframe: Indicator Data Chart

View each indicator's results in beautiful charts that the platform auto-creates in mere seconds. Customized the appearance of the chart via the left sidebar so that the chart shows only what matters the most to you.



Budget Management

Create project budgets to value your project's social impact and track expenditures. Group budgets and individual transactions into categories to simplify budget management.

Read to Succeed Ghana (R2SG)
A comprehensive project to advance early grade reading outcomes in Western Ghana.

Total Budget \$155000.00

Categories and Budgets:

- Impact Evaluation: \$32500.00 of \$40000
- Publishing of Local Language Reading Materials: \$5000.00 of \$50000
- Teacher Training: \$25000.00 of \$60000
- Travel: \$4110.00 of \$5000

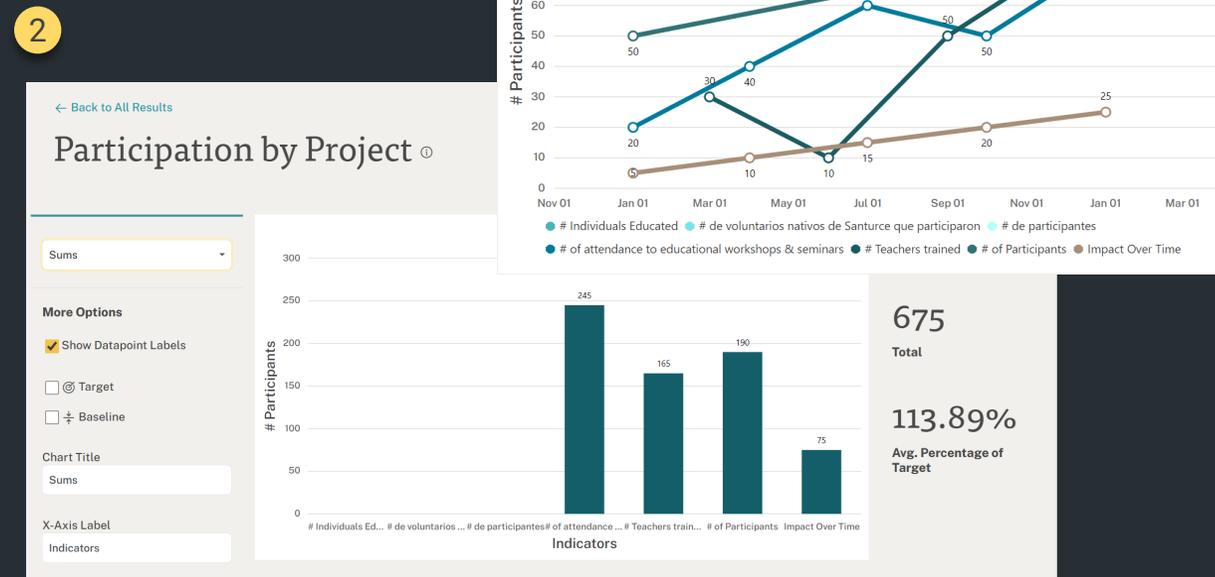
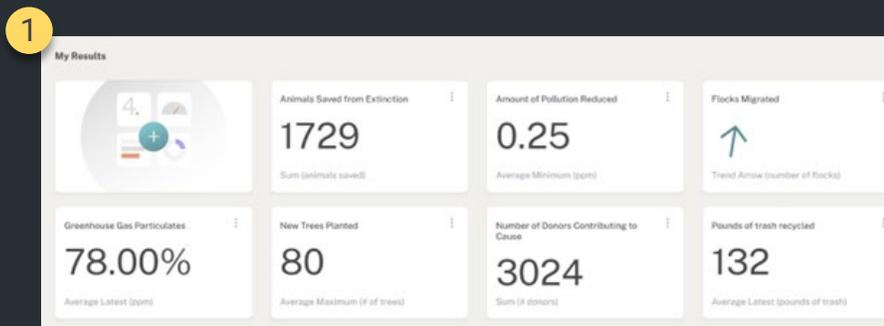
Date	Category	Transaction	Amount
5/26/2023	Printing	First Print Run	\$500.00
8/30/2022	Professional Services	Translation Services	\$1500.00
4/5/2021	Professional Services	Local Language Translat...	\$3000.00

Publishing of Local Language Reading Materials by Category

Results

Results provide a view into cumulative impact by enabling aggregation of indicator data from within and across projects.

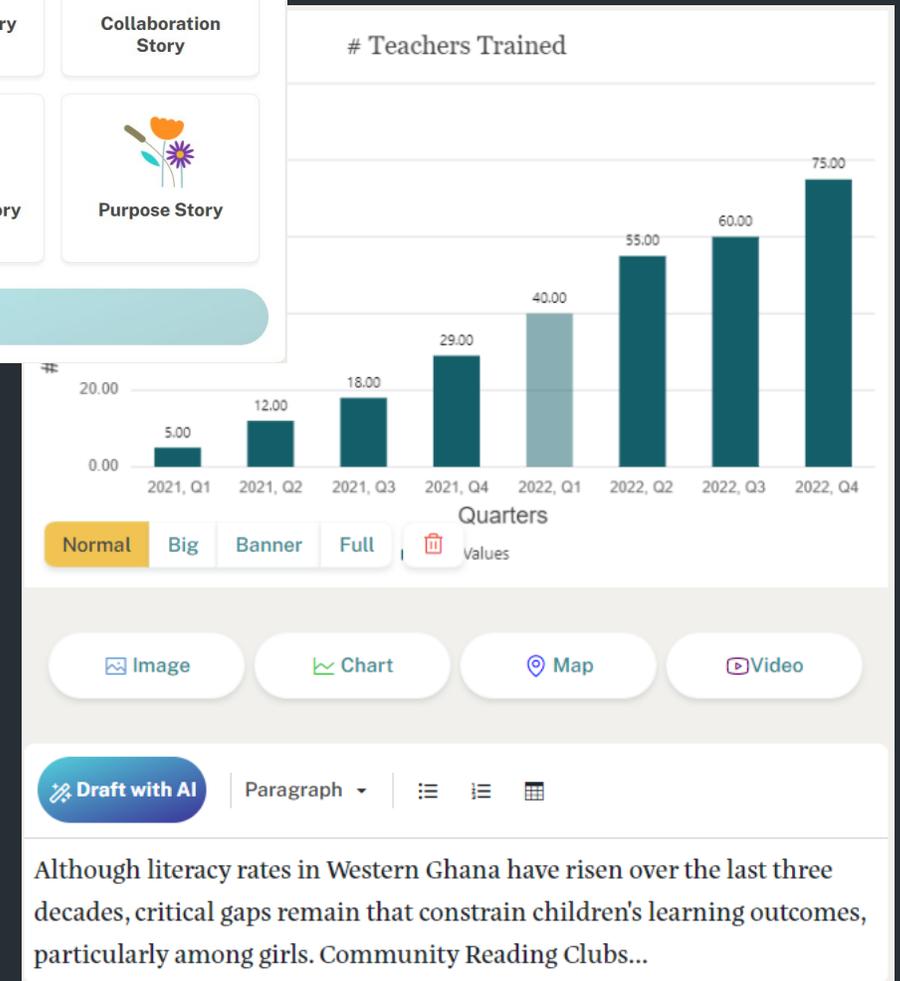
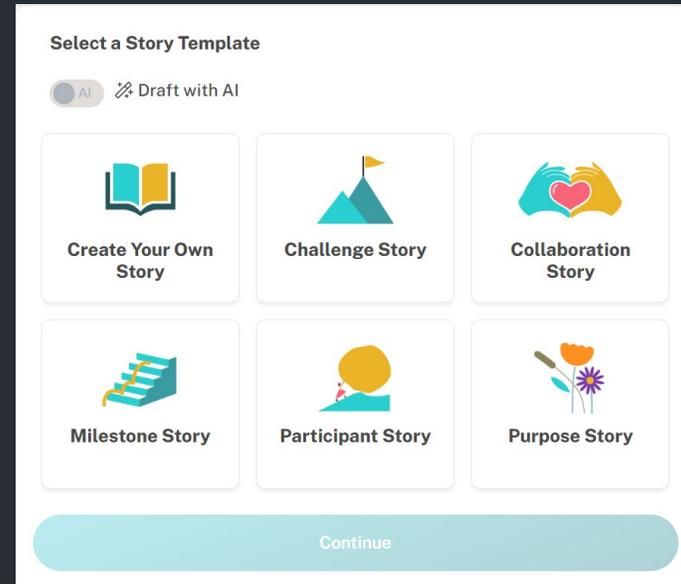
- Dashboard with all Results values (1)
- Results details pages with the option to view various statistics and component indicators (2)



Story Builder

Design and compose beautiful, impactful stories that move people to action.

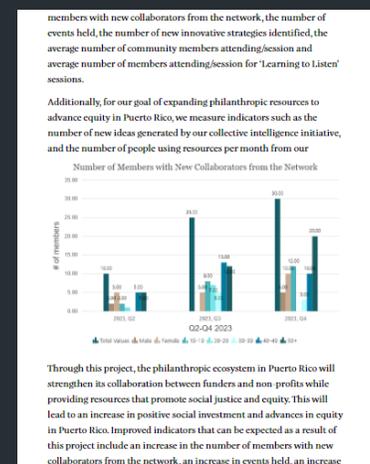
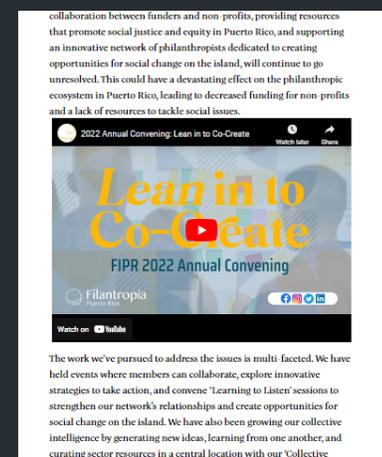
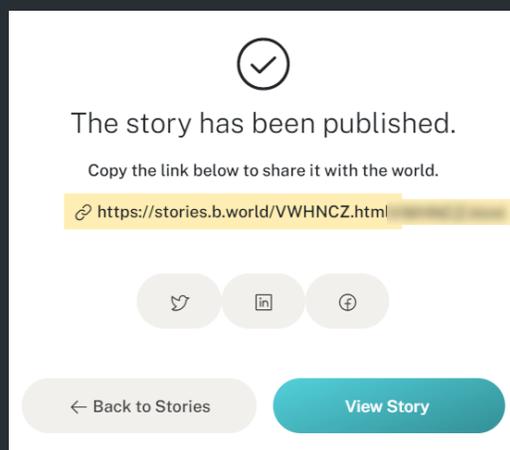
- Choose from a set of six easy-to-use templates
- Enhance your story with indicator data charts, maps, images and videos
- Easily drag-and-drop existing text from the project into your story
- Build capacity by utilizing GPT-powered AI functionality to compose first drafts



Although literacy rates in Western Ghana have risen over the last three decades, critical gaps remain that constrain children's learning outcomes, particularly among girls. Community Reading Clubs...

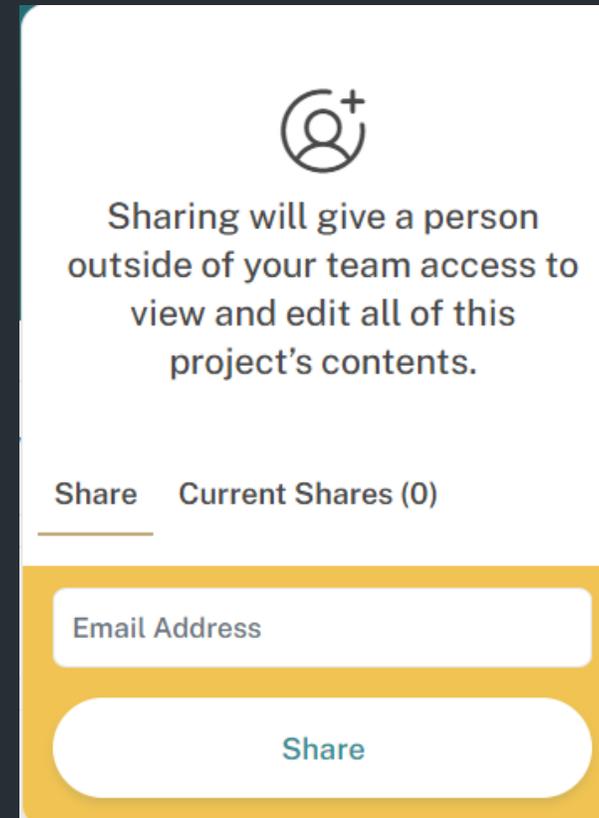
Story Publisher

Publish your impact story to share with the world and move people to action. Share via a hyperlink and/or directly via popular social media channels.



Project Sharing

Project sharing makes it possible to drive collective impact by sharing and collaborating on projects with other b.world teams.



The image shows a mobile application interface for project sharing. At the top, there is a circular icon containing a person silhouette and a plus sign. Below the icon, the text reads: "Sharing will give a person outside of your team access to view and edit all of this project's contents." Underneath this text, there are two labels: "Share" and "Current Shares (0)". The "Share" label is underlined. Below these labels is a white input field with the placeholder text "Email Address". At the bottom of the interface is a large, rounded white button with the text "Share" in blue.

Q&A

Next Steps: Schedule a roadmap review with Microsoft TSI's product team

Likelihood to Donate AI model

Identify constituents most likely to donate at a certain level within a certain timeframe

Gift acknowledgment template

Configured scenario template to support common scenarios

Humanitarian Insights tool announcement

Partnership announcement with DataKind, Save the Children, and commitment to build for a consortium

Fundraising Scenario template

Common scenario template built by threshold.world, featuring the National Forest Foundation

AI-assisted learning comprehension and study aids

Solution featuring content summarizing and question BOT

Customized fundraising letter template

Template built by RSM

Thank you

Microsoft.com/nonprofits

