



Bridging Eras: Integrating AI with Tried and True Screening Methods

Today's Agenda



- **Welcome and Introduction**
- **What Prospect Research Era are you In?**
- **Traditional Methods of Prospect Research & Screening**
 - Historical Overview
 - Screening Techniques
- **Transition to Modern Techniques**
 - Introduction to AI & Data Analytics
 - Impact of AI on Fundraising
- **Real Stories: Integration of Traditional and Modern Models**
 - Enhancing Fundraising Efforts
 - Leveraging New Tools for Better Fundraising
- **Conclusion**

Meet Your Presenter



Sarah TeDesco
COO & Part-Owner
DonorSearch

About DonorSearch



Successful entrepreneurs delivering FR intelligence technology to nonprofits.



100 employees in 35+ states!



Only company serving NP/FR AI market with 10+ dedicated inhouse staff



Family Owned & Operated.
13,000+ active clients.



We house 850+ Data Points
248 Mil+ Individuals.



Best in class datasets for wealth, philanthropy, and connections.



Best in class technology platform for classic wealth screening services
30m/month



Only company serving NP/FR market with inhouse Artificial Intelligence and Machine Learning technology.



Most experienced team supporting with 100+ Predictive AI/ML clients.
GenAI is next.



SOC2 Certified



Product Overview:



ProspectView Online 2

The revolutionizing donor prospecting solution. Seamlessly navigate a custom user dashboard, embedded Gen AI prospect reports, rapid access through keyword searches, interactive prospect profiles, and more!



Enhanced CORE

your organization's gateway to Generative and Predictive AI. Our AI-powered fundraising platform is the perfect entry point for organizations looking to harness the power of predictive artificial intelligence.



DonorSearch Ai

DonorSearch Ai maximizes predictive artificial intelligence to make fundraising smarter. Through an interactive visualization tool that integrates multiple datasets, we provide actionable insights resulting in high-performing advancement offices.



Marketing Lists

Marketing Lists Access hundreds of wealth, giving, and demographic attributes of over 160 million households.

40 + CRM Integration



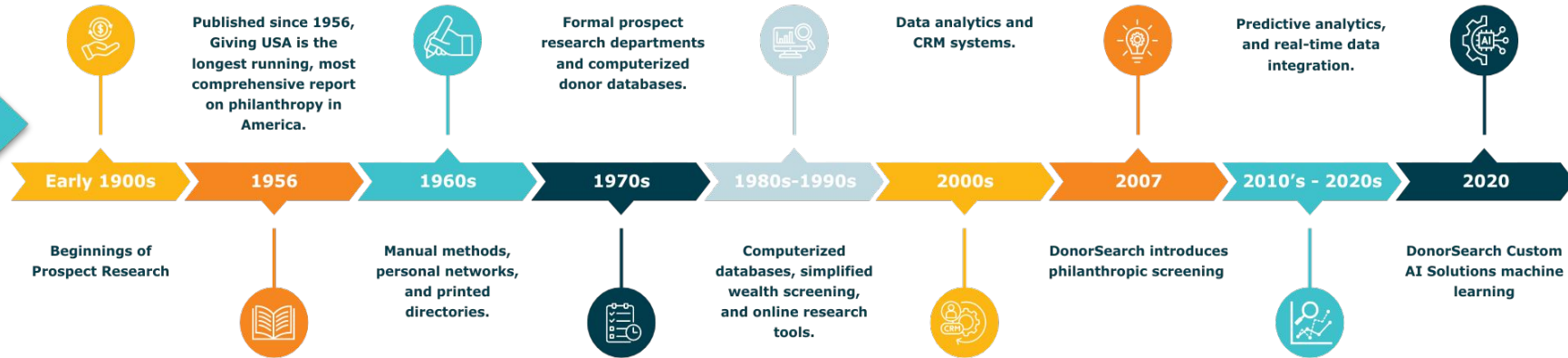
API BASED APPLICATIONS





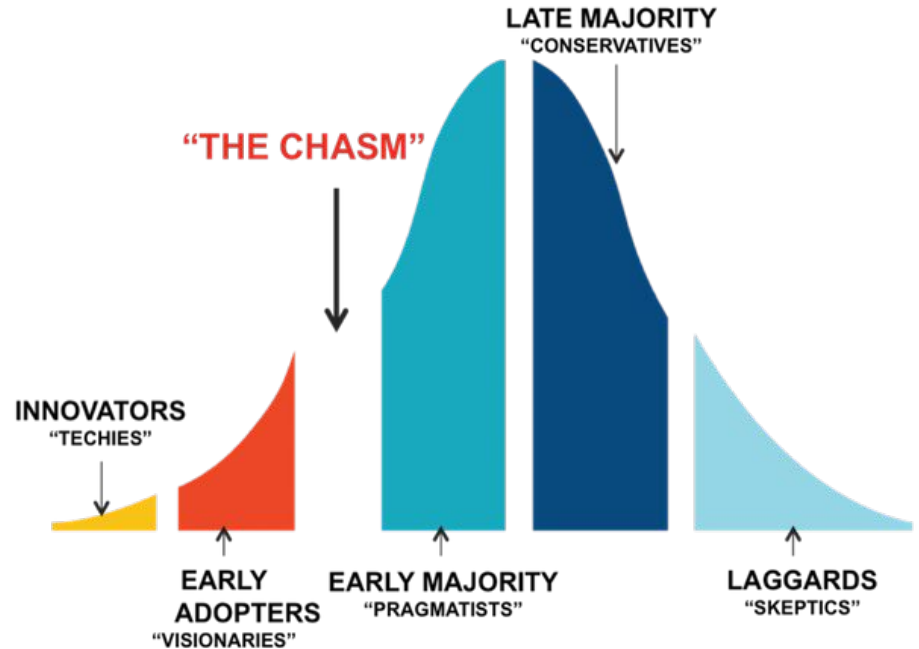
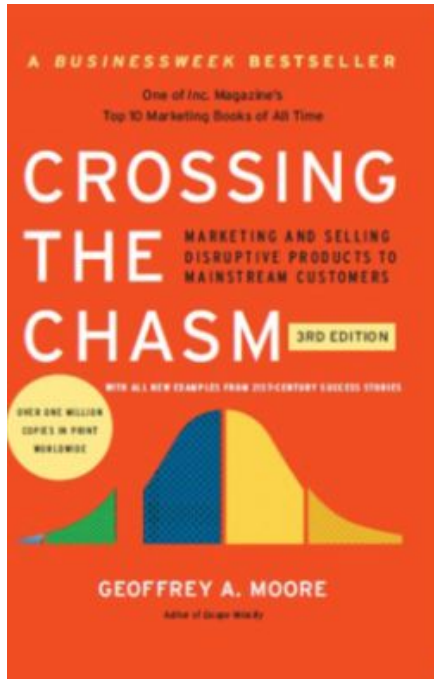
What Prospect Research Era Are You In...?

Brief Historical Overview



2024 - Generative and Predictive AI fundraising solutions available for a NPO of any size.

"If It's Not Broke, Don't Fix It!"



The State of Artificial Intelligence in the Nonprofit Sector



75%
believe AI
makes
their life
easier



73% of
nonprofits
believe AI
innovation
aligns with
their beliefs



83%
People believe
there needs to be
an ethical
framework in
place before wider
adoption



52% of
people are
afraid of
AI



Traditional Methods of Screening and Prospect Research

Historical Overview

Models & RFM

- Time consuming
- Expensive & static models
- Donor Exhaustion & difficulty identifying new prospect

Wealth Screening Based on Real Estate and Zip codes

- Big House would often signify a donor has affinity and capacity when it did not...



Historical Overview

Personal Networks and Referrals

- Fundraisers often relied on personal networks, referrals, and word-of-mouth to identify potential donors.
- Donor identification was heavily dependent on the relationships and social circles of the fundraising team.

Event-Based Research

- Events such as galas, auctions, and community gatherings were key opportunities for prospect research.
- Fundraisers used these events to observe potential donors, engage in conversations, and gather insights about their interests and capacity to give.

Historical Overview

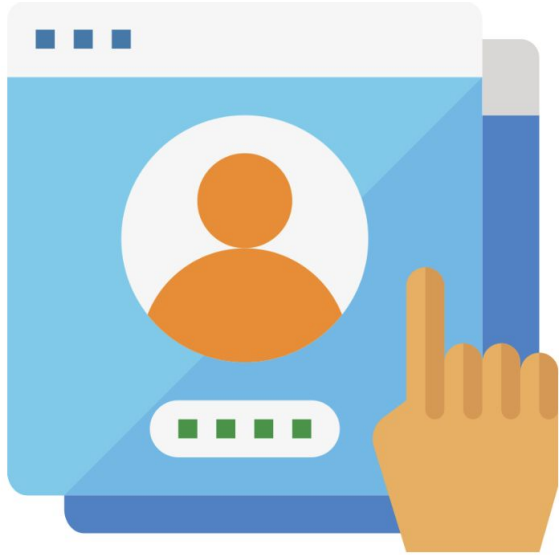
Philanthropic Publications and Directories

- Organizations utilized printed philanthropic directories and publications to find information about known donors and their giving patterns.
- These resources provided a foundational understanding of donor behavior and philanthropic trends.

Basic Record-Keeping and Manual Research

- Early fundraising efforts relied on manually tracking donor information through handwritten records, spreadsheets, and basic databases.
- Fundraisers conducted manual research by combing through public records, newspapers, and directories to identify potential donors.

Importance of Traditional Methods in Laying the Foundation



- **Establishing Basic Donor Profiles**
- **Building Relationships and Trust**
- **Understanding Donor Motivations**
- **Identifying High-Potential Donors**
- **Laying the Groundwork for Data-Driven Approaches**

Markers of Philanthropy

- In 2007 DonorSearch looked at **5 billion dollars** in known charitable giving to over **400** nonprofit organizations.
- The donors were analyzed to determine what factors made someone **more or less** likely to give a major gift.



Predictive Markers for Major Gift Donors



**1: Giving to YOU
(Internal Giving)**



**2: Giving to
OTHERS (External
Giving)**



**3: Foundation
Trustees**



4: Political Giving



5: Real Estate



**6: Business
Affiliations
(SEC, Privat Cos)**



When It Comes to AI, What Career Era Are You In?...

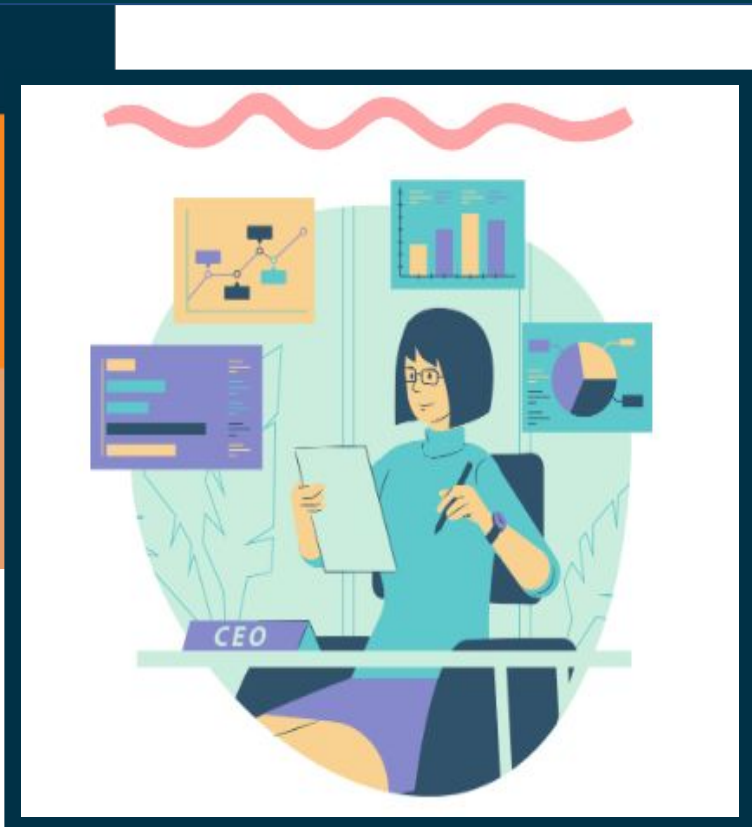
“The Golden Hand-Off Era”

If you are a leader and you are planning on retiring in the next 5 years...(IMO)

- You could leave it to your replacement.
- AI is like dog years, except it is going to be very difficult to catch up.
- It will be as **prevalent as using a spreadsheet.**



“Encore Leadership Era”



If you are a leader and plan on working for the next 5 years or more...(in my opinion)

- **AI is not going away** and it will not take your job, as long as you use it to increase to the increase the organization’s productivity.
- **People who do not understand and do not know how to us AI** are the folks most **likely to be replaced by people** that do know how to use it.
- The good news is it is pretty simple to understand now. **Advice – Learn it now** so that the next wave (**6-12 months**) will be simpler to understand.

“The Launchpad Era”

If you are early in your career...

- **Become proficient at using AI** to solve problems, even if you have learn on your own time.
- **Advice - *It will be nearly impossible for you to become a leader based on merit without hands on experience.*** Your advancement should be easier and quicker.
 - Your teams will be able to accomplish more and higher quality in less time.





Transitions to Modern Techniques

Overview of Modern Technologies

Artificial Intelligence (AI):

- AI refers to the simulation of human intelligence in machines programmed to think and learn. It encompasses various subfields, including machine learning, natural language processing, and computer vision.
- AI systems can perform tasks that typically require human intelligence, such as recognizing patterns, making decisions, and predicting outcomes.

Data Analytics:

- Data analytics involves examining large datasets to uncover hidden patterns, correlations, and insights. It uses statistical and computational techniques to transform raw data into meaningful information.

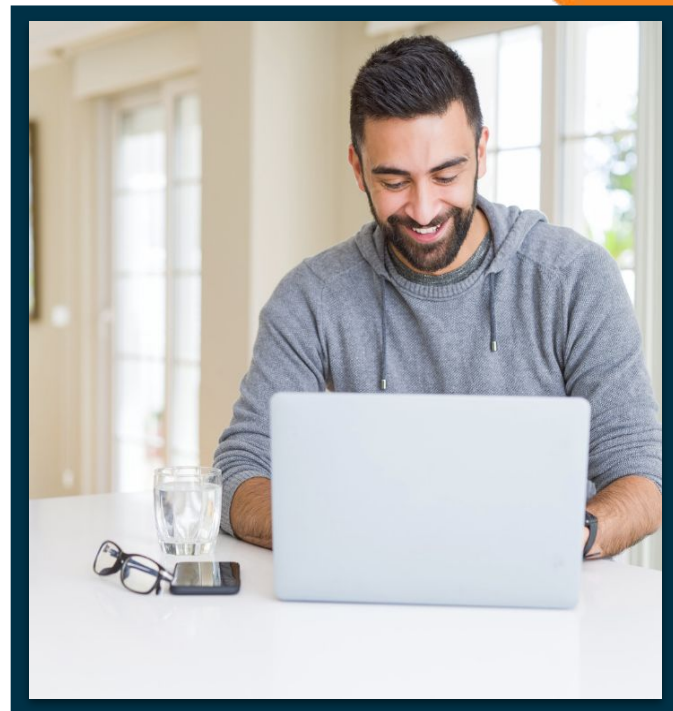
What is Predictive AI?

Predictive AI refers to AI systems that analyze historical data to predict future outcomes. It's widely used in applications like weather forecasting, stock market analysis, and customer behavior prediction.

How Predictive AI Helps Fundraisers

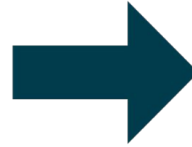
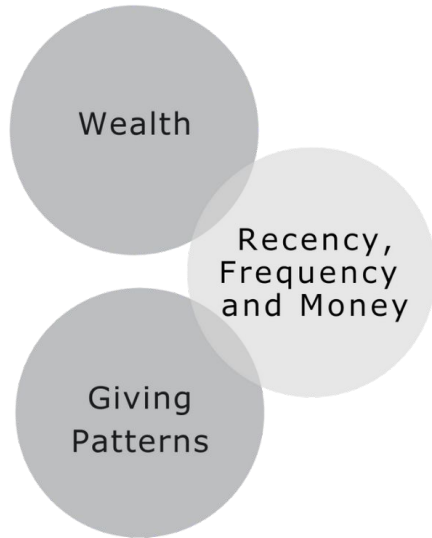
Predictive AI can help answer questions about what donors and prospects might do in the future.

- Will this prospect make their **first gift**?
- Will this donor **give again** within a specific time period?
- Which donors have a **greater lifetime value**?
- How likely will this donor become a **monthly sustainer** (giver)?
- Which donors are most likely to be **retained**?



Bringing AI to Screening

Standard Models

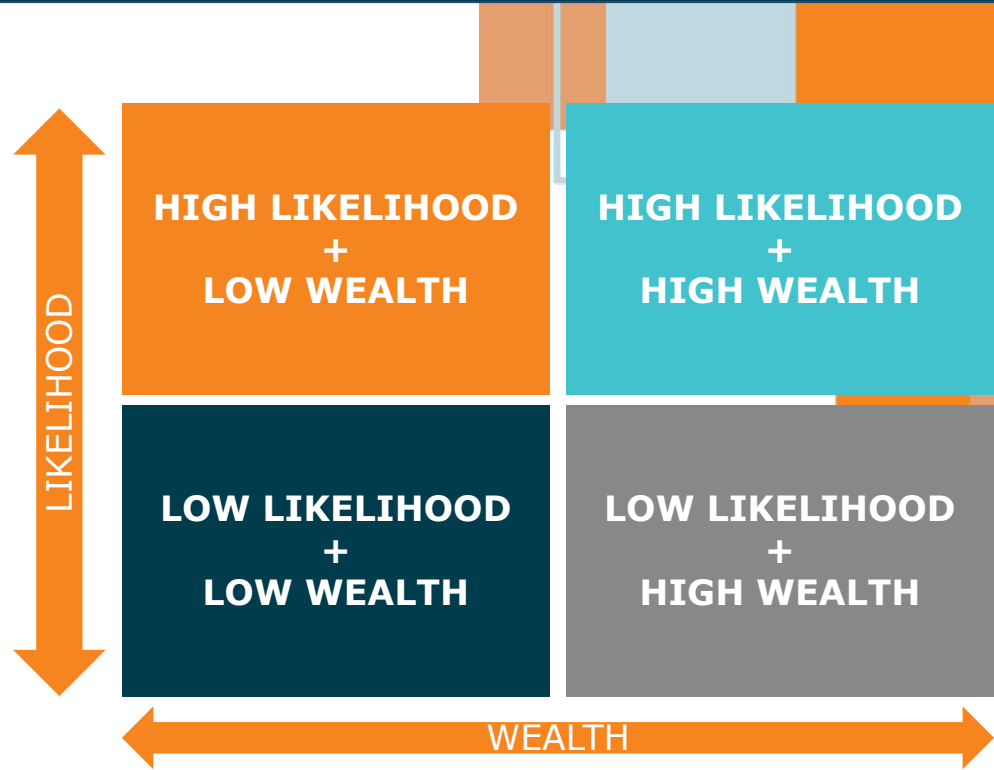


Machine Learning Models



Likelihood Segmentation

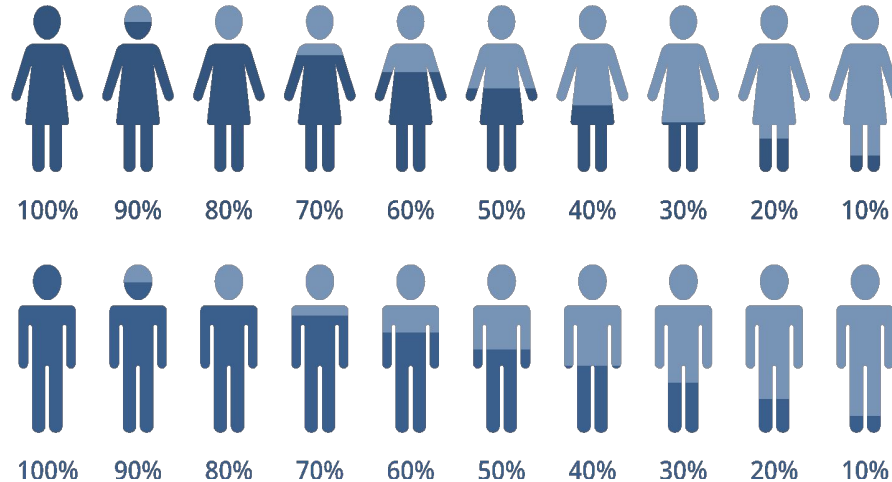
- **CRM** Summary Data
- **CRM** Gift Transaction Data
- Experiential Data (**Alumni, Clinical, Special Events**)
- Wealth, Demographic and Consumer Data
- **DYNAMIC-ML** Scoring
- Social Media
- Disparate Algorithms



What is Generative AI?

How has each person's connection or engagement changed over time? Each connection, and engagement is specific to that nonprofit.

Score is assigned based on the number of commonalities with alumni donors



All are re-scored regularly based on updates to their data

What is Generative AI?

Generative AI is designed to generate new, original content. It's not just about understanding data but creating new data that didn't exist before, such as deep fakes, new music compositions, or art.

How Gen AI Helps Fundraisers

Generative AI can help create materials and inventive ideas for reaching out to donors and prospects.

- Design **personalized marketing materials** that appeal to individual donor interests.
- Introduce **unique themes or experiences** for our next fundraising event.
- Generate social media posts to effectively **spread awareness** about our cause.
- Creatively recognize donors in a way that encourages **long-term** relationships.
- Develop **new engagement strategies** to attract younger donors.

The Perfect Blend

PREDICTIVE AI

Machine + Deep Learning

Precision

Generates **predictions**
about who will give, when,
how much, etc.



GENERATIVE AI

Large Language Models

Personalization

Creates new **content**
largely based on others
data.

**Combined, these two technologies make for a more
TARGETED + PERSONALIZED form of Precision Philanthropy.**

Impact on Fundraising

Home / Lawrence J Ellison

Lawrence J Ellison
2850 Broadway St
San Francisco, CA 94115

Client ID: 8205
Business Address: N/A
Spousal Address: N/A
Spouse: Lawrence Investment Lc
Age: Click to add
Date of Birth: Click to add
Phone Number: Click to add
Email Address: Click to add

Engagement

RFM

HLR

DS AI

Giving Rank

Charitable Giving

Political Giving

Real Estate

Profile Quality

Medium
18 of 25 points

Giving Snapshot

- DS: Arts, Culture and Humanities
- DS: CEO
- DS: Education
- DS: Healthcare
- DS: Other

Gift Likelihood

- Major Gift
- Annual Gift
- Planned Gift

Suggested Ask

Based on Giving

\$100,000,000+

Based on Wealth

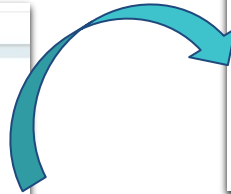
\$100 Million+

Charitable Giving 7 189

Political Giving 176 94

Crowdfunding by Donor Social 5

- Wealth
- Giving
- Industry
- Nonprofits
- Relationships
- Bio
- Custom
- Profile Options
- Search Profile
- Generative Reports
- Refresh



What would you like to include?

Suggestions based on your profile

Native Information

- Wealth
- Non-Profits
- Giving History
- Connections
- Industry
- Biography

Visual Information

- DS Score
- Giving Snapshot
- Engagement
- Gift Likelihood
- Giving Rank
- Suggested Ask

[Generate Report](#)

Lawrence J Ellison
Ceo

Contact: Home Address: 2850 Broadway St, San Francisco, CA 94115 Business Address: 0

Giving Percentile (USA)

Category	Percentile
Charitable Giving	92.0
Political Giving	92.0
Real Estate	92.0

Giving Snapshot

Suggested Ask

Based on Giving: **\$100,000,000+** Based on Wealth: **\$100 Million+**

Date: 05/21/2024
Prepared by: Prospect Manager

Lawrence J Ellison, DonorSearch pg 1 of 2

Lawrence J Ellison
Ceo

Lawrence J. Ellison, often known as Larry Ellison, is a prominent figure in both the technology and philanthropic landscapes. Born in San Francisco, California, he has had a long and successful career as a CEO, primarily recognized for his role as the CEO of Oracle Corporation. The well-known entrepreneur and business magnate have amassed significant wealth, with an estimated net worth of \$112 billion.

Ellison's influence extends beyond the business world, as he has also made a significant impact in the philanthropic sphere. His philanthropic endeavors are channeled through the Larry Ellison Foundation, which operates with a focus on providing grants and contributions for various charitable causes. The foundation has supported numerous initiatives, and in a single year, it approved grants totaling \$3,902,500, and paid out \$33,989,433 to further its mission.

Furthermore, Ellison's commitment to philanthropy goes beyond just financial contributions. He serves as a Director, President, and CEO of The Larry Ellison Foundation, showcasing a hands-on approach to his charitable efforts. The foundation's activities reflect Ellison's dedication to making a meaningful difference in areas that align with his values.

In addition to his philanthropic engagements, Ellison's wealth can be evidenced in his real estate holdings. One significant property of note is a residence in San Francisco, valued at approximately \$8,385,151. Moreover, his association with high-value business ventures, including Oracle Corporation, demonstrates the extensive scope of his financial influence, with the company's business revenue totaling an impressive \$75,204,000,000.

Ellison's philanthropic and wealth profile depicts a multifaceted individual whose impact is felt not only in the tech industry but also in the realm of charitable giving and societal contributions. His significant financial resources and proactive involvement in philanthropy illustrate the depth of his commitment to leveraging his wealth for the betterment of society.

Lawrence J Ellison, DonorSearch pg 2 of 2

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Real Stories: Integration of Traditional and Modern Models

Children's Healthcare of Atlanta

The screenshot shows the website's navigation bar with the logo and a search bar. Below the navigation, a green banner for 'HEALTHCARE PROFESSIONALS' features a central white box with the headline 'Nothing Matters More Than Kids' and a 'GIVE TODAY' button. To the right of the text is a 'BEST CHILDREN'S HOSPITALS' award badge from US News. The background of the banner is a close-up photo of a baby's face with a pacifier.

Children's Healthcare of Atlanta | I WANT TO [dropdown] | [search icon]

MEDICAL SERVICES | PATIENTS | VISITORS | DONORS & VOLUNTEERS | HEALTHCARE PROFESSIONALS | CAREERS | DONATE

HEALTHCARE PROFESSIONALS >

REFER A [dropdown]
P [dropdown]

Nothing Matters More Than Kids

Every day we provide nationally-ranked pediatric care to Georgia's kids and teens, so they can get back to just being kids. And with your support, we're continuing to raise the bar for pediatric care in Georgia for years to come.

BEST CHILDREN'S HOSPITALS
US NEWS
RANKED IN 10 SPECIALTIES
2023-2024

GIVE TODAY

< ● ○ ○ ○ >

Children's Healthcare of Atlanta

Case Study: Children's Healthcare of Atlanta and DonorSearch AI (DSAi)

1. Client Overview:

- Children's Healthcare of Atlanta used DonorSearch AI (DSAi) to improve donor qualification.

2. Qualification Process Using DSAi:

- DSAi identified patient families with major giving capacities of **\$5M+**.
- A donor with low clinical engagement but a high **DSAi score of 94 and giving capacity of \$100K+** was flagged.
- She was added to the Major Gifts Officer (MGO) portfolio.

3. Outcome:

- Within two weeks, the donor signed a gift agreement for **\$50,000**.

The AI Integration Plan: DonorSearch AI



Custom AI Models designed specifically for Children's Healthcare of Atlanta:

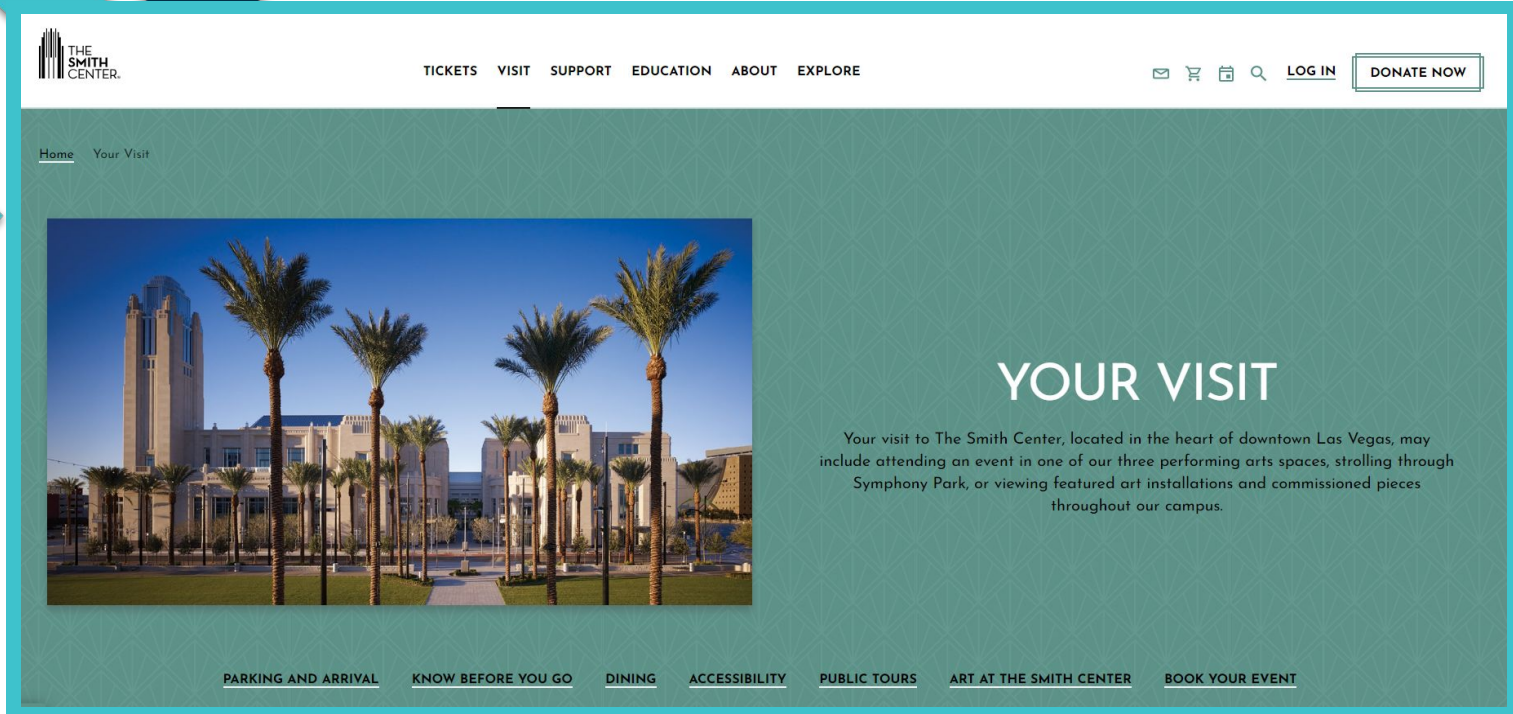
- Recalibrations
- Unlimited data points
- Responsible AI
- **Daily Patient Screening**
- **Access to ProspectView Online**

DSAi Health Intelligence:

How Can I Use It?

- Analyze managed portfolios by prospect count, high-likelihood and capacity
- Review wealth screening results and mine for high-capacity prospects
- Analyze top-visited clinicians by prospects, high-likelihood patients and capacity
- Analyze department capacity by prospect count, high-likelihood patients and capacity
- Identify and prioritize the lapsed donors
- Analyze activity of specific prospect
 - AI score, recency of visit, last gift date
- Determine best clinician(s) for introduction to new prospect
- Identify high net-worth individuals to be vetted for principal gifts

The Smith Center




The screenshot shows the homepage of The Smith Center website. The header features the logo on the left, a navigation menu with links for TICKETS, VISIT, SUPPORT, EDUCATION, ABOUT, and EXPLORE in the center, and utility icons for email, shopping cart, calendar, search, and LOG IN on the right. A prominent 'DONATE NOW' button is located in the top right corner. Below the header, a breadcrumb trail shows 'Home' and 'Your Visit'. The main content area is set against a teal background with a repeating geometric pattern. On the left, there is a large photograph of the Smith Center building, a modern structure with a prominent tower, surrounded by palm trees and a clear blue sky. To the right of the image, the heading 'YOUR VISIT' is displayed in large white letters. Below this heading, a paragraph of text describes the visitor experience: 'Your visit to The Smith Center, located in the heart of downtown Las Vegas, may include attending an event in one of our three performing arts spaces, strolling through Symphony Park, or viewing featured art installations and commissioned pieces throughout our campus.' At the bottom of the page, a horizontal row of seven underlined links provides further navigation: PARKING AND ARRIVAL, KNOW BEFORE YOU GO, DINING, ACCESSIBILITY, PUBLIC TOURS, ART AT THE SMITH CENTER, and BOOK YOUR EVENT.

THE SMITH CENTER.

TICKETS VISIT SUPPORT EDUCATION ABOUT EXPLORE

✉ 🛒 📅 🔍 LOG IN **DONATE NOW**

Home Your Visit



YOUR VISIT

Your visit to The Smith Center, located in the heart of downtown Las Vegas, may include attending an event in one of our three performing arts spaces, strolling through Symphony Park, or viewing featured art installations and commissioned pieces throughout our campus.

[PARKING AND ARRIVAL](#) [KNOW BEFORE YOU GO](#) [DINING](#) [ACCESSIBILITY](#) [PUBLIC TOURS](#) [ART AT THE SMITH CENTER](#) [BOOK YOUR EVENT](#)

The Smith Center

Case Study: The Smith Center for Performing Arts

Challenges:

- Closed doors, loss of revenue, and staff layoffs during COVID-19.
- Small fundraising team needing actionable insights quickly.
- Need for a reliable revenue stream.

"The initial email that we sent out paid for DonorSearch the first year. And because they are monthly donors, they are going to continue to pay that first, second, and third year. One email. So, that's pretty spectacular."

Strategy:

- Immediate Impact: Sent an email using DonorSearch data, which paid for the service in the first year and sustained revenue for future years.
- Increased Monthly Giving: Doubled the monthly giving program by using DonorSearch AI to identify high-potential donors.
- Screening: Provided 50,000 names for screening, identifying donors likely to give multiple gifts.
- Efficient Integration: Utilized bidirectional API with Tessitura CRM for seamless data management.

The AI Integration Plan: Enhanced Core

Strategy:

- Moved to **Sustainer Scores** and **MLR Score** for monthly dynamic scoring
- Continued to screen data and prospects
- Direct marketing / email approach

Results:

- Saved and Revitalized the Center
- New donors and refreshed portfolios
- Foundation success
- Fast ROI



Blue 13 Dance Company

BLUE13 DANCE COMPANY

REIMAGINE AMERICAN DANCE



UPCOMING

Classes, concerts, events, & more

[VIEW CALENDAR](#)



Photo Courtesy of Cheryl Mann



BOOKING

Concerts, commercial, & private events

[LEARN MORE](#)

Blue 13 Dance

Case Study: Blue13 Dance Company and DonorSearch AI (DSAi)

Challenges:

- Small fundraising team.
- Weak fundraising strategy.
- Difficulty finding relevant grant opportunities

“DonorSearch is the first product that I’ve used...that I have felt was intuitive, that had the support I needed, and that was accurate.”

Strategy:

- Developed a two- to three-year plan for donor engagement and targeted asks.
- Used DSAi to identify high-potential donors.
- Implemented targeted mailing campaigns with local donors.

Blue 13 Dance Company

Grant Prospecting:

Discovered new grant opportunities, leading to successful applications.

Results:

- Accurate insights guided cost-effective outreach.
- Raised \$100,000 quickly using DSAi's Most Likely to Respond (MLR) score.
- Significant ROI within the first few months.
- Enhanced donor engagement and saved money on outreach efforts.
- Found new funding opportunities previously unknown.
- Made their money back within the 1st couple of months.



The AI Integration Plan: DonorSearch Core



Strategy:

- Moved away from the RFM - static models to **MLR Score**
- Continued to Screen Data and prospects
- Grant Research
- Event Screening

Results:

- Saved time
- New Donors and Refreshed Portfolios
- Foundation Success
- Fast ROI

The ROI of AI



- **Precision + Personalization**
- **Efficiency Boosts**
- **Increased Quality of Work**
- **Improved Work Satisfaction**



So, What Era Will You Choose?

Next Steps...

Phone Number: (410) 670-7880

Email Address: info@donorsearch.net

Website: www.donorsearch.net

Ready to take your fundraising to the next level?

Let us show you how!

Scan the QR code to get access to DonorSearch to see how your organization can harness the power of AI for your fundraising.



SCAN HERE TO
BOOK A DEMO!











TEXT HERE

More About DonorSearch

Mission Statement:

Provide premier donor intelligence data and solutions to **nonprofits of all shapes and sizes** to strengthen their financial capacity.

DonorSearch Values:



Excellence



Quality



Innovation



Collaboration



Integrity



Growth

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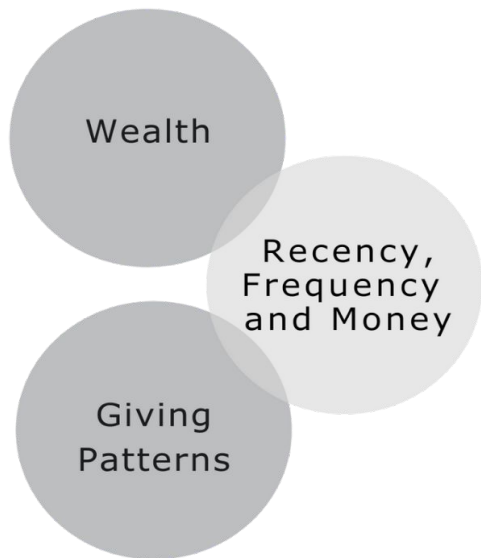


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Path to Acceleration

Standard Models



Machine Learning Models



Giving Patterns



Experiences



Wealth Indicators



Demographics

Predictive Markers for Major Gift Donors



**1: Giving to YOU
(Internal Giving)**



**2: Giving to OTHERS
(External Giving)**



**3: Foundation
Trustees**



4: Political Giving



5: Real Estate



**6: Business
Affiliations
(SEC, Privat Cos)**

The DonorSearch Study

The following information that will be discussed during this presentation was pulled from a study that DonorSearch conducted.

- We looked at **5 billion dollars** in known charitable giving to over **400** nonprofit organizations.
- The donors were analyzed to determine what factors made someone **more or less** likely to give.



Defining Major Gifts

One:

Major gifts constitute your organization's **largest** financial contributions

Two:

Have the **Highest Return on Investment**

Three:

We NOW see **90-95%** of most fundraising totals come from only **5 or 10% of donors**



**When it comes to AI,
what career era are
you in?...**



Next Steps...

Name:

Phone Number:

Email Address:

Ready to take your fundraising to the next level? Let us show you how!

Book a demo with one of our fundraising experts today to see how your organization can harness the power of predictive AI for your fundraising.



SCAN HERE TO
BOOK A DEMO!



Next Steps...

Name:

Phone Number:

Email Address:

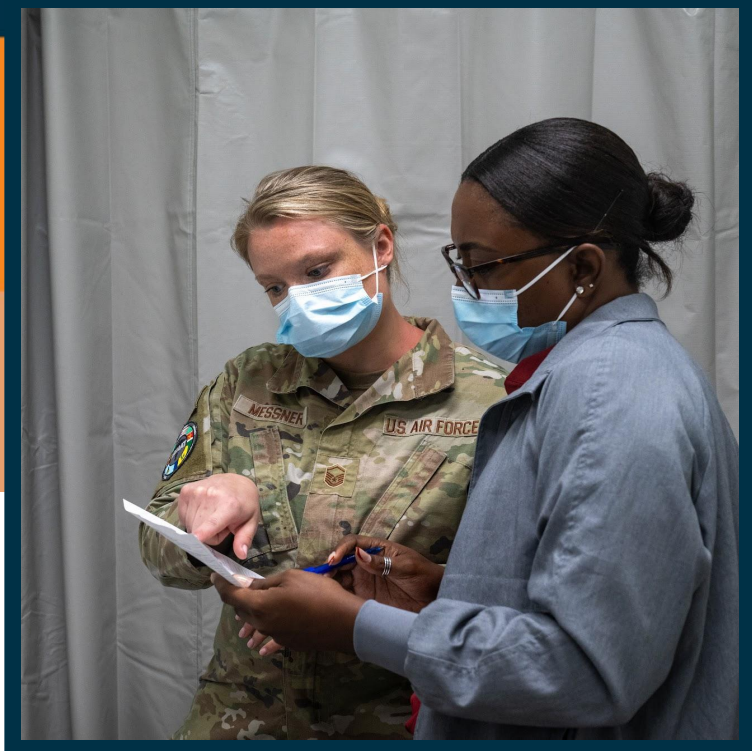
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SCAN HERE TO
BOOK A DEMO!

Likelihood Segmentation



Coupling AI With Repeatable Processes

Major Gift Discovery Calls

- TBD???
- High DSAi ratings based on engagement, not yet a donor

Major Gift Portfolio Review and Refresh

- Prioritize based on DSAi Score
- Engagement
- Identify new prospects for MG Strategy

Major Gift Philanthropic Interest

- Prioritize based on DSAi Score
- Philanthropy Key Words

Major Gift Events and Visits

- Prioritize based on DSAi Score
- Efficiently plan based on Geographical Regions

Transform the Way We Fundraise



Artificial intelligence is the simulation of human intelligence processes by machines, especially computer systems.



 DONORSEARCH

title