



# EXPLORING THE FUTURE OF PHILANTHROPY: Elevating Fundraising in the Post-2020 Era

*2024 Presentation*

## Worksheets and Guides Included:

1. Developing Donor Personas
2. Top CRM Usage and Maintenance Tips
3. Let's Talk About DAFs - Executive Summary
4. AI Ethics Screen
5. Implementing Community-Centric Fundraising

Questions? Let us know!

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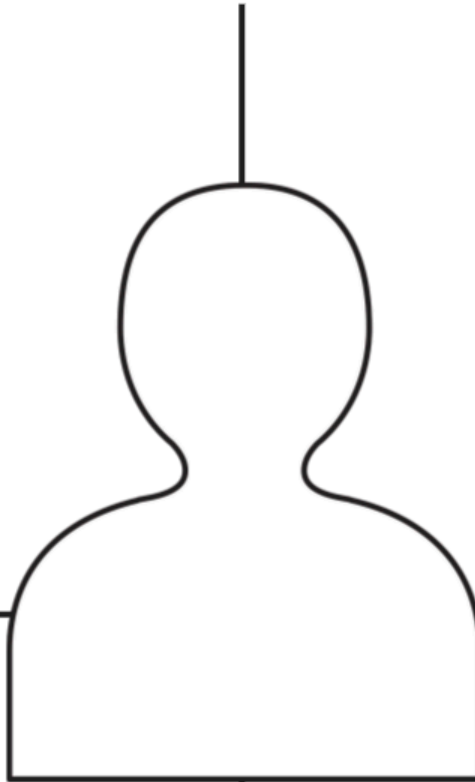
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# DONOR PERSONAS

Who are your current donors? Who are prospective donors? What common traits can we predict?

How did they first get involved with the organization?

What programs, services, or parts of the mission most interest them in giving?



What connections do they have to the organization or this work?

What other organizations are they giving to or involved in?

# Top CRM Usage and Maintenance Tips

Managing your data well not only allows you to properly track constituents like donors and volunteers but also gives you insights into opportunities through trends.

1. Appoint
  - a. Identify your database maintenance point person.
    - i. They will ensure proper maintenance is completed within agreed-upon timeframes.
2. Merge
  - a. Your database has duplicate accounts. MERGE THEM! Do this regularly and before any mailing, event, etc.
3. Purge (Or not)
  - a. Do not purge your donor information unless there is an actual issue or error. Even if it would allow you to get below some sort of billing threshold with your CRM, the cost is in lost data.
4. Household
  - a. Each individual should have their own account and then be able to be combined via a householding feature. This reduces your mailing costs and ensures that donations are properly attributed.
5. Do Not Mail
  - a. Make sure to include a DNM reason in your CRM (ie: requested, bad address, etc). Some of these reasons can be reconciled, allowing the account to no longer have mailing restrictions.
  - b. When running reports, include your DNM field for this reason.
6. Mailings
  - a. Every mailing that goes out should be recorded on the constituents' records. It provides a historical roadmap for what led to a donation, volunteerism, etc.
7. Imports
  - a. Whenever possible, match imported data to Donor ID to ensure proper attribution. This decreases dual entry and the chance for error.
8. Roles
  - a. Constituents are more than just donors to your organization. Record that! Some roles to consider:
    - i. Staff/Former Staff, Board/Former Board, Volunteer/Former Volunteer
9. Campaigns
  - a. Donation recording should both reconcile to your financials and also have additional information about campaigns and initiatives that brought the gift in. This allows the fundraisers to know which efforts are successful.
10. Maintenance Schedule and Checklist
  - a. Run exception reports, de-dupe, etc.
  - b. Run local backups (in case your CRM's server ever crashes).
  - c. Confirm that tasks are completed.
  - d. Set up regular intervals, typically monthly and prior to any mailings.
  - e. Reconcile contributed revenue in your CRM with your accounting records.

## Bonus Tip: NCOA Records

- a. When running a mailing through a mail house, they typically run an NCOA search for any updated addresses. Include donor ID numbers in your list to the mail house so you can import any address changes directly back into your CRM.

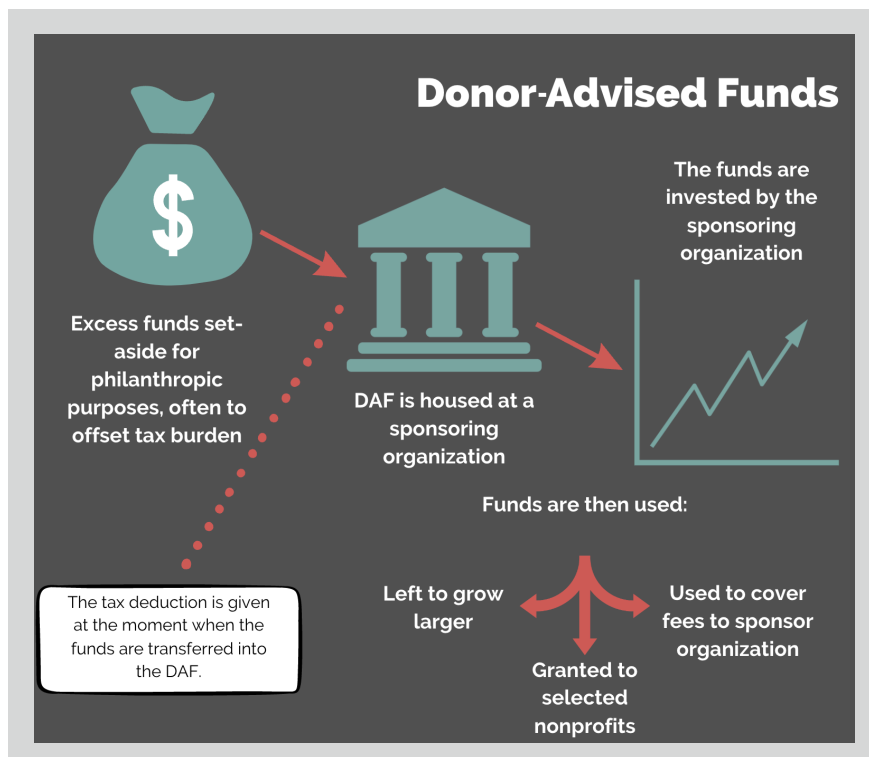
## Executive Summary

Philanthropy faces a critical moment. The lack of oversight and giving requirements for Donor-Advised Funds (DAFs) can be problematic and must be addressed by the philanthropic sector openly, without defensiveness, and in earnest collaboration toward a better way.

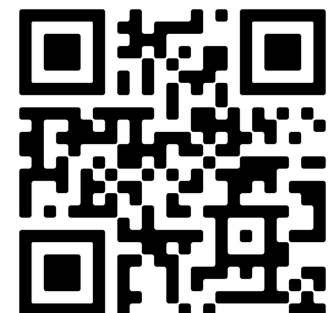
At **Prismatic Consulting**, we seek to address systems and structures that perpetuate inequities. We are in a position to call out community issues that stem from DAFs and suggest pathways toward resolution. Our aim with this document is not to abolish DAFs altogether – when used properly, they are valuable philanthropic vehicles for giving.

However, many inside and outside of the philanthropic sector find the current requirements for establishing and managing DAFs to be problematic, contributing to larger systemic issues beyond philanthropy, such as the widening wealth gap, diversion of tax dollars from communities, and even threatening the very tenets of our democracy (Collins and Flannery, “Gilded Giving 2022: How Wealth Inequality Distorts Philanthropy and Imperils Democracy”).

- ▲ \$1.4 trillion is currently set aside in private foundations or DAFs, and yet there is no evidence of DAFs increasing charitable giving (IUPUI Lilly Family School of Philanthropy).
- ▲ Through Fidelity Charitable, the largest sponsor of DAFs in the U.S., \$4.9 million was given to 31 designated hate groups (Farr). Similarly, DAFs managed at community foundations and private foundations also made contributions to hate groups (Theis).
- ▲ For every \$1 that a billionaire donates, taxpayers chip in as much as 74 cents in tax revenue that the billionaire avoided when making their donation (Collins).



Get the full DAF guide, including actions to take!





## Revolutionizing Fundraising Part III: Guiding Questions for Nonprofit AI Implementation

The following questions are from the CCS Fundraising blog series:

<https://www.ccsfundraising.com/insights/guiding-questions-nonprofit-ai-implementation/>

All credit goes to CCS Fundraising and the authors of the blog: Ashutosh R. Nandeshwar, Senior Vice President, Data Science & Analytics; Duncan Bindbeutel, Director

### How is your organization already using AI?

1. While AI tools can be a force multiplier and drastically increase worker output, they are not likely capable of replacing individual workers. Consider how you might address a reduced workload for certain workers.

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2. Will you need to change your organizational chart to accommodate shifting workloads and obligations?

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### Would AI-generated materials disappoint your donors?

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## What could AI pricing and legal troubles prompt?

1. How quickly could your organization adjust to changes in access to specific AI software?

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2. What if lawmakers passed laws to limit or stop using the AI programs of your choice? How would you recuperate costs in building your custom application?

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3. How would you meet the exact needs with a different solution?

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## What risks come with early adoption of AI at your nonprofit?

1. How do you estimate the value of being the first to adopt new tools? What if the shiny tools are only polished and not functional?

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2. What if you build something, but the tech changes so fast that any custom development might be obsolete?

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3. With Generative AI, there are other reputational risks, too: What if significant hidden costs exist related to issues important to your organization, such as environmental damage from data center cooling?

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### **Can your nonprofit rely on AI-generated materials?**

1. How might you respond if your organization made a biased or otherwise controversial statement generated by AI?

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## 7 Ways to Implement Community-Centric Fundraising

Adapted from Nicole Hoffmann's "When we know better, we do better: 7 Ways you can start doing better using CCF principles in your fundraising" available on the CCF Hub.

- 1) Commit to a cultural shift in how you and your organization think about fundraising.** Begin by questioning the reasons behind your fundraising efforts and what you prioritize. If your focus is more on wealth than on serving the community, it's a good moment to reconsider.

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Strategy:			Strategy:
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- 2) Continued personal learning and unlearning are critical to understanding why change is necessary.** Discovering that you might contribute to systems that support white supremacy is tough. However, it's valuable when you start learning and prioritize justice in your work.

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Strategy:			Strategy:



**3) For all of my white colleagues, listen to people of color.** The key lesson is, when people of color say something needs to change and share what they need, it's crucial to act without delay. We have a responsibility to address those needs. **For colleagues of color, what are ways to incorporate healing and self-care into your life?**

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**4) Be willing to take risks, especially financial risks, for the greater good.** You don't have to change your entire way of fundraising all at once, but it's important to begin somewhere. Practice "small experiments with radical intent."

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**5) Lean into your values.** Not everyone will support the changes you make, and that's fine; they may not be the right fit for your cause (especially if they prioritize themselves over the communities you serve). While losing some donors can be disappointing, every time you stick to your values, you'll attract more support.

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**6) Plan to make change, and then plan to make change again.** The key practice to keep in mind is that change is inevitable. It's perfectly fine to modify and improve your work based on new information and feedback.

1.		3.	
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**7) Don't let the perfect be the enemy of the good.** There's no perfect moment or perfect plan. Just begin making changes today because it's the right thing to do to stop harmful fundraising practices.

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# EXPLORING THE FUTURE OF PHILANTHROPY

## Elevating Fundraising in the Post-2020 Era

1



**Prismatic Consulting** is a full-service consultancy based in Colorado that focuses on nonprofit, government, and social good companies. We believe in the power of people; to disrupt inefficient and ineffective systems, transform their communities in ways that are more equitable for all, and create real, lasting change. At Prismatic Consulting, we empower people to address these root causes.

LET'S GET STARTED

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**TOPICS**

- 01 Understanding the Post-2020 Philanthropic Landscape
- 02 Evolving Donor Behaviors
- 03 Harnessing Philanthropic Tools Effectively
- 04 Navigating Philanthropy with a Community-Centered Approach

3

**UNDERSTANDING THE POST-2020 PHILANTHROPIC LANDSCAPE**

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# 2020 - What Happened?

## Major Shifts and Challenges in Philanthropy

- Racial and Social Justice
- Digital Transformation in Giving
- Urgency for Humanitarian Aid
- Economic Uncertainty

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## Continued Shifts and Challenges

- Nonprofit Sustainability
- Transparency and Accountability
- Local and Grassroots Initiatives
- Remote Work and Collaboration

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GivingUSA's Data:  
Where is philanthropy  
going?




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Evolving Donor  
Behaviors

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## Rise of Donor Expectations

-  Transparency as a priority
-  Impactful communication
-  Data-driven decision making

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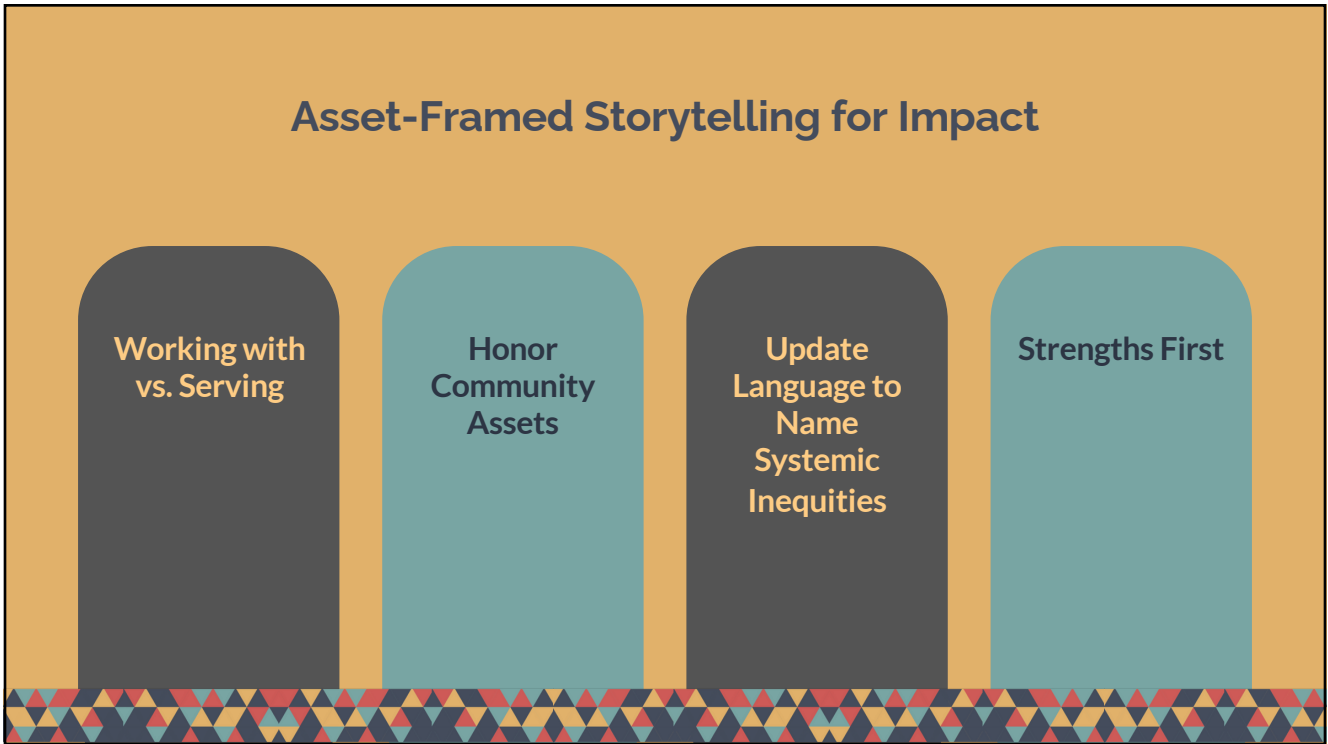
## Trends in Donor Engagement

- Increasing use of online platforms, crowdfunding, and social media, especially among younger donors.
- Greater alignment with personal values, with a strong preference for social justice and environmental sustainability.



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The slide is titled "Case Study: Asset Framing" and compares two perspectives on a program. It features a dark blue background with a tan semi-circle on the top left and a teal semi-circle on the bottom right. A red-bordered box contains two columns of text. The left column is titled "ORIGINAL" and describes a program for at-risk youth. The right column is titled "ASSET-FRAMED" and contextualizes the program within systemic issues like segregation and social control. The bottom of the slide has a colorful geometric pattern.

ORIGINAL	ASSET-FRAMED
<p>This is a new program that supports at-risk youth in our School District and is a measure that we are proactively taking to curb youth violence, as well as empower high school students and build their leadership capacity. The program stemmed from firsthand feedback from students following incidents of violence in local communities. By providing alternative after school activities, we are able to steer students away from activities that could lead to criminal behavior and violence.</p>	<p>Systemic issues such as segregation, land use, social control, social capital, and social trust are intricately tied to the complex characteristics of the neighborhoods where our students reside. We understand that these students carry additional burdens that their more privileged peers do not experience. Listening to the needs of these students and partnering with community leaders, we have developed this program to help empower them to cultivate leadership skills, foster connections with their peers, and address the complex challenges they encounter.</p>

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Interactive Activity:  
Donor Persona  
Development

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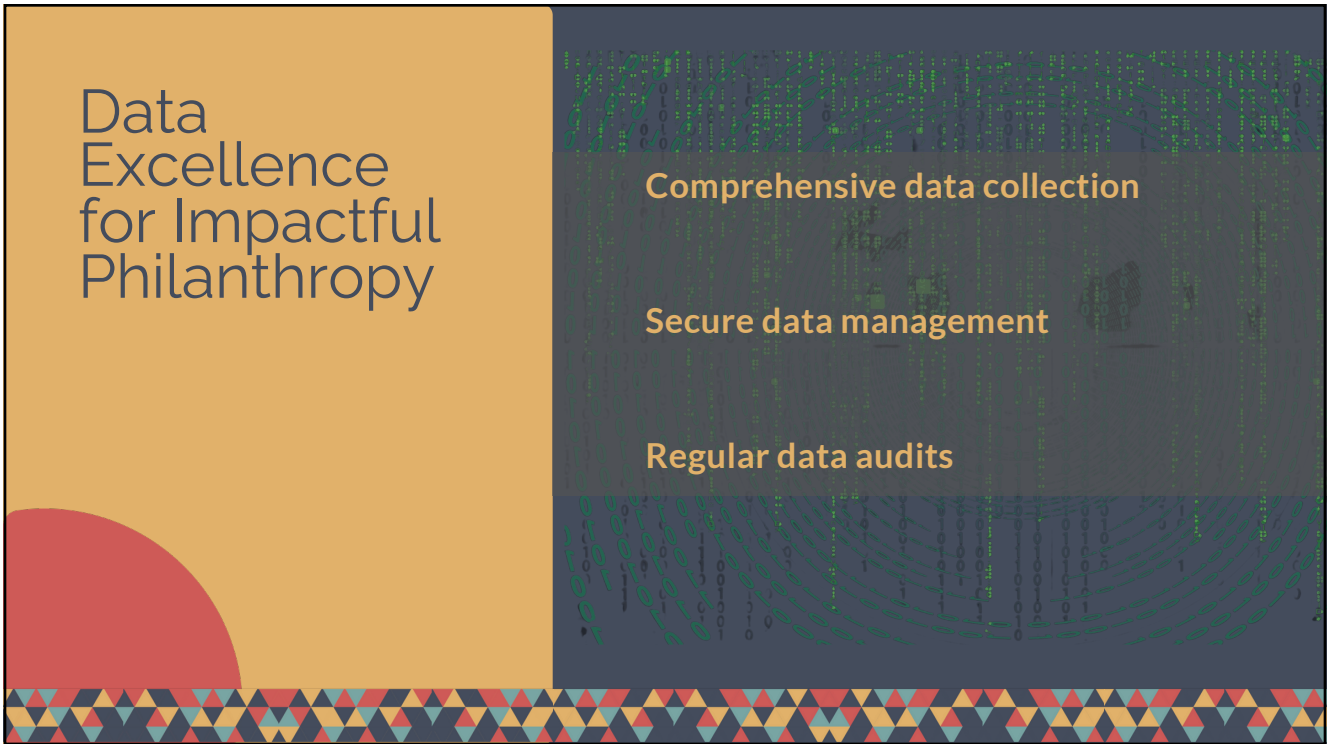


Harnessing Philanthropic  
Tools Effectively

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# Data Excellence for Impactful Philanthropy

- Comprehensive data collection
- Secure data management
- Regular data audits



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# Power of AI in Advancing Philanthropic Goals

- Predictive analytics
- Personalized engagement
- Automated workflow



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Challenges & Opportunities with DAFs

- Understanding donor-advised funds (DAFs)
- Cultivating DAF relationships
- Moving forward with DAF contributions

The slide features a man with a beard and a red t-shirt shrugging his shoulders with a confused expression. The background is split into a light orange left side and a dark grey right side. A red semi-circle is visible in the bottom left corner of the orange section. A decorative border of colorful triangles runs along the bottom edge.

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Navigating Philanthropy with a Community-Centered Approach

The slide has a teal background with a light orange horizontal band in the middle. The title is centered in the orange band. A dark grey semi-circle is in the bottom right corner. A decorative border of colorful triangles runs along the bottom edge.

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# Grounding Fundraising in Race, Equity, & Social Justice

- Training for fundraising professionals
- Reflecting on social justice topics
- Direct investment in fundraising professionals from the communities served



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# Fair Distribution of Funding and Resources

- Ensuring fair distribution to underrepresented communities
- Mission alignment with community needs
- Willingness to adjust or cease operations if necessary



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# Investing in Staff and Board Members



- Enhancing effectiveness across the sector
- Collaboration with other nonprofits
- Supporting interconnected missions

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# Valuing All Community Contributors



- View clients as vital community contributors and appreciate them equally to donors
- Recognizing volunteers, including board members, as community contributors

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# Treating Donors as Partners



Transparent conversations with donors

Educational opportunities for understanding complex work

Balancing donor wishes with community well-being

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# Fostering Authentic Community Partnerships

Mindful storytelling and image usage

Emphasizing collective language and benefits

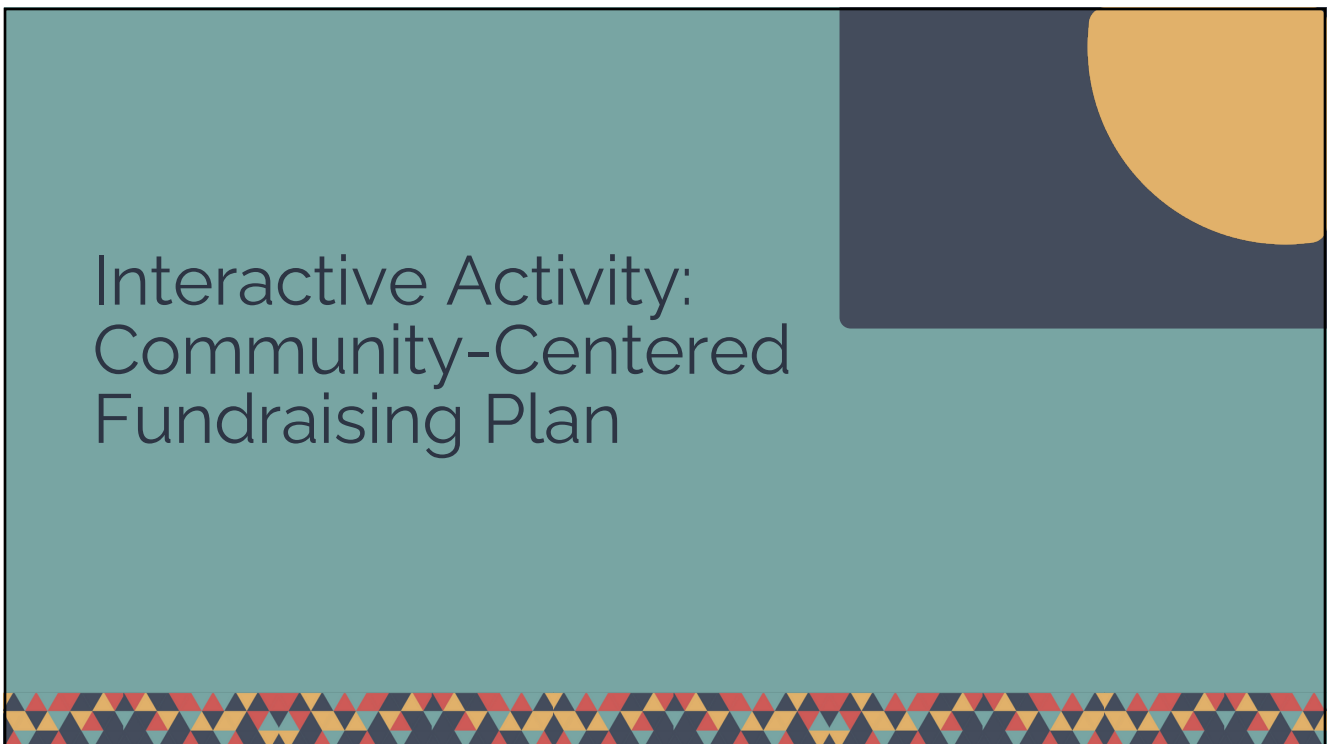
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## The Work of Social Justice as Holistic and Transformative

Transparent financial reporting  
Commitment to economic justice

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## Interactive Activity: Community-Centered Fundraising Plan

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