

>> Andrew Means: Alright, we've hit the top of the hour, we're going to go ahead and get going. Welcome and thank you so much for joining Markets for Good first ever virtual round table event. I'm sure this will be the first of many amazing things to come. We have a lot to talk about today, and, but before we dive into the content and I introduce today's panelists, we just want to cover a few housekeeping details. For all of our audience members that are out there today, your mics are going to be muted through the length of the conversation, but we do want to hear your thoughts and questions. So please use the chat function, I believe it's over in the, [inaudible] webinar box and chime in with any questions that you may have for us, as time allows we're going to cover as many of those as we can at the end of the conversation. And we won't be able to get through everything, but be sure to stay tuned, to Markets for Good, where we'll address some more of those questions, will over more insight, perspectives and opportunities to engage on this really important issue. [Background noise] We're going to be recording and sharing out this, conversation in round table on the Markets for Good website, and following it up with more posts and viewpoints, other perspectives people that we couldn't get here today, about Giving Days, coordinating giving campaigns and digital infrastructure for the social sector. For today's discussion, I'm really pleased to be able to have three wonderful members of our round table, we have Asha Curran, the Chief Innovation Officer at 92nd Street Y and the force behind Giving Tuesday, Priscilla Enriquez, which is the chief giving officer for the Sacramento Regional Community Foundation and Beth Kanter, long time.

>> Beth Kanter: Yes.

>> Andrew Means: Nonprofit innovator and trainer and author of Beth's Blog. Thank you guys so much for joining us, and we're here to dissect the recent Give Local America day Technology fail and identify the lessons that we can learn from this event as we work to make good on Giving Days and really fulfill the promise and potential of digital infrastructure to support the social sector. To kick us off, Beth, you have been one of the leading voices, covering this, the Give Local America Day tech failure, could you just kind of catch us up on what happened on May 3rd, for those that might not be as informed of what actually happened.

>> Beth Kanter: Sure, sure, Andrew, and first I also want to give credit to a lot of other folks out there who have also been reporting on this event, doing a fantastic job. Specific, Kivi Leroux Miller from the Nonprofit Marketing Guide and Peter Panetpento, they've done excellent job reporting and also, Kivi was very instrumental in encouraging us to use a hashtag called I think give day lessons, or something like that to encourage these kinds of conversations. So I just wanted to give some kudos out there. So let me give you kind of the, the news overview and then let me give you, what I experienced that day, although I wasn't, I was not running a campaign, I wasn't on the ground with any campaign. So I guess the headline is, Give Local America, a national online giving event, that took place on May 3rd experienced epic failure after its main soft-

ware provider, suffered major technical problems, prompting a response from the company and serious outrage from participating nonprofits, their donors and of course, Giving Day hosts. And to give you a sense of why people who wrote about this used the word epic failure, it didn't just impact one Giving Day, it impacted, a number of them, to the tune of approximately, according to news reports, 13,000 nonprofits and 50 places or hosts. So let's step back for a moment, Give Local America, the intention, started what, in 2014, as an umbrella campaign for local communities to host Giving Days. And so most Giving Day hosts were either Community Foundations or United Way chapters, using some software provided by Kimbia and so I think in 2014 roughly, just you know through a quick Google search, I'm looking at the information that's on Kimbia's site, they've raised collectively, \$53 million in one day, we all cheered, that's pretty, impressive. And then last year, \$64 million. Unfortunately, because of the, the technical problem, probably the event, cannot be cheered or felt as successful as it should have been. The Giving Day host, that is people like Priscilla and, who work at Community Foundation, United Ways, some of them were doing their Giving Day for the first time, so, and probably were a little nervous about it anyway, because it was something new. And they had this happen. And then on the other end of the spectrum, we had very experienced Giving Day hosts that have been doing, these Giving Days even before giving, Give Local America and to the point where their communities, the nonprofits there had depended on the big day event, because it was part of their, you know. They had incorporated the Giving Days into their annual fundraising plans. So, the outage caused a lot of the community organizations to scramble, particularly those that didn't have a backup plan. For those that did, have a crisis plan, to go to plan B, I saw tons of creativity in the way the, organizations handled this. And Priscilla's going to talk more about, you know how her organization sort of executed their crisis plan or plan B. But we saw too many foundations either suspending the event, or extending the event. Or, collecting donors through other channels. And I think Kivi wrote an excellent case study of what happened in South Carolina and I know Priscilla will share more. But let me tell you, you know what, you know from my perspective and how I felt empathy for, scaled empathy or PSS, you know post-traumatic stress disorder, if you will. So for the past couple years, I've been really honored to facilitate a pure learning cohort of a group of Knight Foundation community partners, all Community Foundations who are hosting Giving Days in their communities, using an excellent resource that, that Knight invested in, called the Giving Day Playbook. Which was developed by a company called Third Plateau. And, and so this group, has been experimenting, using the Giving Day Playbook, having regular conference calls, learning from each other's successes and things that didn't go so great. We've been able to, package the knowledge that has come from this group into, back into the, the playbook but also to webinars for, more best practices. And we've even have a space that's for any Community Foundation, it's online, to have a safe place to talk to their peers, exchange tips, and knowledge's [phonetic] about Giving Days. So I also facilitate all of those activities including the online virtual group. So on May 3rd, I went into the

group and sort of wished everybody good luck, and I actually went off and made a couple of donations early on, to a couple of nonprofits in my local community. Because I felt I had to participate in, you know I give where I live. And then I noticed, you know when you're a community manager you keep on track of what people are saying. I started noticing people saying hey, the server's slow, mine stopped, mine's not loading, are you having this? And, and then as the minutes kind of leaked into hours, stretched into hours, more and more messages were posted. And folks started providing support, we started pointing to, the crisis management tips and so on and so forth. And I remember I was so stressed out, from this I was watching, actually I put a [inaudible] together of all the tweets and what are people saying. And I just saw, I just felt so bad, you know, the nonprofits, all the angst that was going. So, you know put yourself in this position, think about like a time when you've been writing a grant report, okay, for hours, or Andrew, you've been working on analyzing some data okay. And then all of a sudden, you know, boom, the, you know the, the software fails and you lose your work, you know. Think about how you feel, but think about that feeling magnified a million times, so I'm exaggerating but many, many, many times. So and to me what the tragedy was, is that I know when a Giving Days is successful and many, many, many, they always are. There's such a great feeling of empowerment in the community that we're scaling, giving the nonprofits feel good, the donors feel good, the hosts are, raising their profiles in the community. They're bringing in new donors, and we all feel really great. So to me it was a tragedy to have this kind of frustration scale. And you know, that's the point that was different, is that you know, it was, a big failure across many communities. I mean we've had technical glitches before, it's happened in other communities. For example back in 2013, in Minnesota, and I think one of the early Giving Days in Texas experienced, you know glitches. You know these aren't new, it's, you know, and there's not only technology that can derail Giving Day, you know you can have a hurricane, a blizzard, or any number of other problems that can cause a nightmare for the hosts. But, the fact that this was all on a centralized platform, and it, you know it impacted so many communities at once, you know, is what I think is the tragedy, you know was the tragic event of the day. You know, behind that, and we'll talk about this a little bit later, I think there's some opportunities here. So that's what happened, from you know a news perspective, and you know from my lens.

>> Andrews Means: No, thank you so much Beth, and I think one of the things that you said, that I find interesting is, you know these Giving Days, part of the attraction is, the bigness of it. It's that we're all in this together, it's that we're reaching, you know working with thousands and thousands, of organizations around the country. And yet when we're all tied to one infrastructure, if that infrastructure suffers, you know then it's magnified as well. It's a really big failure. And to help us understand what this was like from the perspective of an organizer. Priscilla, your foundation was actually, organized, a region wide Giving Day as part of the Give Local America event. And you faced the challenges that the platform had that day. So could you just tell us about

your experience and how you negotiated and handled, the tech breakdown that happened.

>> Priscilla Enriquez: Sure, and I want to thank Beth for that great introduction. And having me relive the day. But you know before actually I wanted to give you all a play by play because I think a lot of people are really interested, you know, how did you manage what happened. But before I do that, I want to thank all of the nonprofits across the country, all of the thousands, hundreds of thousands of donors, and all the Community Foundations and community partners who participated. Because they really demonstrated resilience, power, community, collaboration, everything that they've learned, they really exercised and it all came together on that day. So, the way we do it here at the Sacramento Region Community Foundation is, it's sort of broken down into four phases. So, and I have to go back because it's not just the day, we always say it's not just about the day, you know the day is really a kick off of something much greater. But we have four phases, it's recruitment, which is enrolling the nonprofits, you know getting them involved, training them, and that starts back in September. So you have to understand, this starts way back in 2015 for us, to get to May 3rd. And by December we landed with 570 nonprofits, we, you know had hashtag, 570proud, really excited and then in January, the training and the planning kicks in. We have this beautiful tool called the 8 week work plan. We spent over 100 hours of training with the nonprofits in January. We had a goal of reaching \$6 million, 30,000 donors, and the elegance of [inaudible] platform was that you could track all of that. You know and we were in our fourth year, we started in 2013, with a pilot of just arts groups, so you know we had great experience with the platform, loved it. You know, and, you know, we're able to track donations and donors and all this kind of stuff. So really excited, the 8 week work plan was a great tool for all the nonprofits, and we spent a lot of time, in our trainings around board engagement. We had a goal of 100% we're giving. You know can we, and we did the math you know if you had 100% for giving, you know x number of board members times x number of nonprofits, you know this is how much more you could raise. And then by March, April, start the outreach, you know outreaching your donors and activating your boards to, you know activate their own networks, communicating with the media, really, being really active on social media. So that outreach, you know is, sees itself maximized 4 to 6 weeks out, we call it soft marketing. And then 2 weeks out, real heavy marketing and then of course execution, that's our final fourth step on the day. And, just to, let you know how things went, you know the day before we all arrived at the office at 9:30, really excited, and we're going to have a midnight kickoff, our event goes midnight to midnight. Board members arrive, donors arrive, nonprofits arrive, we're really excited, okay. And then you know the day of, midnight it kicks off, there's this frenzy you know you want, we have a prize called the blastoff challenge. We want to see who got that first gift. You know, and so there's all of this excitement building, and then you know we actually shutdown our command center, we go home, we come back in the office, at about 5:30 in the morning. And about 5, 6 o'clock, we notice

that giving was slowing down, you know we couldn't understand. And so I, my CEO and I were sitting adjacent to each other, and, we were looking at our reports, comparing last year's hourly giving to this year's hourly giving. And it was less, and I always look at the other, communities that are also participating in Give Local America. And I remember I was looking at New Orleans, looking at their, donations and how much they've raised, and it was kind of static, like I was kind of confused. Like why, why haven't they raised more in the last 30 minutes, or the last hour. Because usually you see the numbers tick up. So you know we're wondering what's happening and then the next thing you know, the phones are ringing. You know my donation is stuck, it's not going through. I'm getting texts, everyone on staff's getting texts, emails. We have a dedicated email for our big day of giving, that was you know, things were coming through that. But what was interesting is people wanted to give, so that was the one, I would say key indicator that started at about 5, 6 a.m., people wanted to give. They kept calling us as if we didn't know, you know, so they were trying to help us out here. I know and then by 7, complete shutdown, just complete shutdown. And, our staff person on board Jeannie Howell, who manages this campaign, was able to text Kimbia, you know what's going on. Tell me what's going on and you know everything is like, we'll get back to you. We're figuring it out, we're trying to figure this out. And generally that's what happened hourly. And so, you know you can imagine in our command center, and we have a number of volunteers who help us, that's the other key thing to that makes our Giving Day work, is our volunteers. We had our partners from the local PBS station, a nonprofit, you know, just a ton of people helping us out, being active on social media, you know hearing our conversations, translating that, sending messages out. So that was really helpful, and they just did that on the fly, and without, you know, on their own initiation. And that was really, instrumental. So hourly updates, and again every hourly update, from Kimbia was, the same, we're still figuring this out. And by then, it was almost noon, and the nice thing we always say about Sacramento is you know at least we're on the west coast, you know, this again, our third day, third year in Give Local America. We can see what's happening on the east coast and central so that we can prepare, we have time. So, by the noon hour we actually had a physical community event, in downtown Sacramento called the Half Time Celebration. So my CEO and I go, and we're thinking okay, how do we message this. And so the first thing we did, we thought, we don't want to instill fear. You know, and so how do we say it, we don't want to say failure, we don't want to use these really, you know, strong, scary words. So we kept saying well it was intermittent and spotty. The web, you know, we don't know, we don't know what's going on, you know. So it's intermittent and spotty, okay and that sort of gives people the hope that okay, we can still give, you know we can still support these nonprofits. We can hit 6 million, and 30,000 donors. So, we go to the half time celebration, and our CEO is going, speaking and so, again, and we were, our MC is the local, is a local celebrity with the PBS station. And we thought we just need to instill positivity, let's just be positive, this is a celebration, and we're not going to lose that thought. And so she was, she was real positive, people keep giving, we're

going to figure this out, it's just intermittent spotty, we've got 6 million to raise, we have until midnight, you know. And the media was there so she did a lot of media interviews, again trying to instill hope. And then by the time we come back to the office, staff here had a conversation with Kimbia, again, same thing. We still don't know, trying to figure it out. And you know the whole time we're still having faith, we're like okay, well it's going to come back, because every year, that platform was flawless. I mean we just loved it, we really did. And you're able to award prizes, I mean I can go and on. But, you know so we have faith, okay, we're figuring it out. So, you know our strategy here was just to, be positive, and the more emails and texts we're getting about nonprofits were shifting. They were shifting off of the platform to direct donors to their own websites. So we knew that was happening. It didn't alarm us actually, what it did tell us was okay, they're being nimble. They're being proactive, and that's exactly what we taught them. So we knew that they were taking the skills that we taught them, and putting them into action. So, we made that decision and after many conversations, I remember at the half time celebration running into lots of nonprofits, you know. Again, everybody was so positive and supportive, nobody was angry at the Community Foundation, I mean that was a blessing. Because you know you worry about that. But, everyone was positive, you know whatever you need. I had a conversation with Daniel Kauffman with who's with Third Plateau and they do a lot of support for the Knight Giving Day communities. And we talked about, you know Minnesota, you know like give me the drill down what happened. And so, we come back to the office, we collectively decide, okay we're going to shift the day, we're going to extend it to 3 p.m. the next day. And, and different communication strategies, we emailed all, we had a team captain strategy for every nonprofit, so emailed all of them. We have a learning community, all our best Giving Day learning community exchange on Facebook. We actually had one of our volunteers periscope, literally emails that we sent out and periscope that and put that on social media. So, you know all of that together combined, really got the word out. And you know that created a lot of creativity, the nonprofits still very positive, we saw a lot of memes around may the 4th be with you.

>> Beth Kanter: Yeah.

>> Priscilla Enriquez: You know and then, you know the day after, you know we ended the day at 7.1 million, you know. And I mean we couldn't calculate it the very next day because, we, communicated to the nonprofits to collect their offline donations and then we would count it.

>> Andrew Means: Mmm hmm.

>> Priscilla Enriquez: And that actually took some time. And so you know, after we, we were able to calculate all of that, and come to 7.1 million. But two days after, what we decided, we felt weird that we weren't talking to the other Community Foundations who maybe experienced this, you know. Like we needed some group therapy. And so on Thursday, the 5th we took the initiative and called, you know collected as best as we could, and I mean by

then you know we haven't slept. You know, so I, I think I collected maybe about 20 email contacts and, we had a conference call. And, there was a lot of anger. You know there are a couple Community Foundations that just flat out, ended the day. Some of them rescheduled. And you know, the bandwidth was stretched thin, and it's really hard when you're, operating without any information. Nonprofits and donors were asking questions, and you're just kind of shrugging your shoulders and, you know again, trying to put the best face forward. But since then we've collectively stayed together, as a cohort and now we've got 24 involved and we actually submitted a joint statement to Kimbia. You know just clarifying what exactly happened and how can you help us, you know make the best of, of May 3rd, and move forward. So that's sort of in a nutshell, what happened at the ground level.

>> Andrew Means: Oh, thanks so much Priscilla, it's really helpful to hear kind of, your experience as organizing on that day, what that experience was like, really being the go the between between donors and nonprofits, and dealing with this, this massive technology failure. Asha I want to turn to you to talk a little bit about the preparation, you know, you're behind Giving Tuesday a massive, Giving Day that's technology agnostic. But I'd love for you to share a little bit about how, how does 92nd Street Y, help organizations prepare? How do yourself prepare for such a big event? When so much is riding on a single day, right where everyone's kind of, rallied around this one event.

>> Asha Curran: Yeah so thank you, it's really nice to be here, that was, a fascinating recap from Beth and Priscilla, I learned a lot of stuff I didn't know. And I love hearing about how the Community Foundations came together and our staying together as a, collaborative cohort, that's really wonderful. So the Giving Tuesday model is, is different than Give Local. And I think the design differences are kind of interesting to consider at a moment like this and I just wanted to describe that really briefly and then I'll answer your question more specifically.

>> Andrew Means: Yeah.

>> Asha Curran: So central to our philosophy is, that the movement is open source and adaptable as you said, it's technology agnostic, platform agnostic, cause agnostic. We help, we steward, you know, we create and we share what we hope are useful tools. But the vast majority of the creativity and innovation comes from, the Giving Tuesday community which is why Giving Tuesday at its best functions as a capacity building exercise for the whole sector and not just a Giving Day. You know it was founded by a nonprofit, it's really powered by the tens of thousands of nonprofits of various sizes who are part of the community and they, those nonprofits each use their own choice of platforms. And I think that, so there's literally dozens of giving platforms active on that day. And so if one of them fails, it won't bring the whole day down. And so this has backed up for me the importance of that sort of distributed model. It's important in terms of our agnosticism, so it's important philosophically but I think in fact it actually has a very practical application that I haven't really considered before.

So there have been tech fails, on Giving Tuesday, including the very first year our own site, went down, due to traffic. We didn't participate that many people would be signing up and visiting the site.

>> Beth Kanter: It's called the Oprah effect [laughter].

>>Asha Curran: I mean it's a good problem to have, right? But our site was down for almost the whole day and people couldn't even sign up. So, you know we have had this happen, but again, the activity is so distributed and so decentralized, that nothing can imperil the whole day. So I think to answer your question, you know one of the strengths of Giving Tuesday, at least what we see with, you know really what well executed campaigns, is that the day actually takes pressure off. Because it bookends, a good end of year campaign, right. So it doesn't just substitute one day for another, instead nonprofits get to think of creative ways to have sort of two bites at the, giving apple. And even to use, you know some creative ways to extend the giving from Giving Tuesday to end of year. What's really cool is that we started out, creating all sorts of tools and resources for the sector. Everything from you know, very basic how to write a press release, you know, new ways to think about donor cultivation and, donor retention. To the past couple years where what we've been seeing is that the nonprofit, the community is actually now creating those tools themselves, and sharing it with each other. So it really, we feel like, the level of, I think what Priscilla was describing in terms of the, the ability of nonprofits to, to pivot, to keep their senses of humor in times of crisis, at least publicly, which is what's important. We really see that same, that same sense. So, yes, we do, try to prepare them, I think they, that the design itself is also, you know, that it is designed in a way that does not make it a sort of be all or end all day.

>> Andrew Means: That's super helpful and I think the design differences are really interesting at a period like this. Beth, you've mentioned that you've done some work with the Knight Foundation, helping to share some of the best practices from the Giving Day Playbook, that's been developed with the goal of helping them profit and Community Foundations plan, for these exact types of events. Can you just tell us just a little bit about, what a good Giving Day crisis plan would look like, and if the events from you know May 3rd, have reshaped the advice that you might give organizations as they try to plan for big fundraising days, and days like that?

>> Beth Kanter: Andrew, great question. First of all I have to say that, there's so many great resources that are in the Giving Day Playbook. That has been, you know supported by Knight and, initially developed and continues to be supported by the Third Plateau Organization which is also, doing an evaluation of Knight's Giving Day initiative. And what's been really great about the Giving Day Playbook, it's not just a dead textbook, or dead case studies. But the community's knowledge over the last couple of years, has evolved and that's been captured and put into the Giving Day Playbook. Because I think in the beginning, you know it was a lot of basics around, the phases that Priscilla described in preparing your community and capacity building for the nonprofits.

And having an overall communications plan for the day and getting donors ready, and all that, and how to pick a technology platform. And, and so during the course of the life of this learning community, we did have one community that, experienced a failure. So we, so this prompted, some discussions around what goes in a good crisis plan. Who has a crisis plan? And so, of course we round up, you know as the learning facilitator to sort of, lift that knowledge and spread it to the rest of the group. So we had some great case studies presented by people in our community, and those have been captured and put in the Giving Day Playbook, there's a crisis plan template, there's a couple of case studies. There's some readings, etcetera. But, to answer your question. As all this was happening, colleague, Dana Rinderknecht, I always mispronounce that apologies, if I did, from Colorado Gives Day. Which has had their share of technical glitches and other crises. You know have a really solid crisis plan and she wrote a wonderful, blog post, about the steps that they've gone through. And one of the things, the first thing that they do, and she says this is not the fun part, it's actually really stressful to do this. But to work with, a group, in this case they have a corporate partner that's very invested in the success of the event and also has a whole crisis communications team. And they brought in their PR firm and they have some board members also with, you know experience. So this group worked over time, to develop the plan. So they start with, you know a session of what is the worst possible things that could go wrong? And this was the things that make you leave the meeting, not wanting Pepto-Bismol, or whatever. You know, what happens if the facility, where we host our data servers, has a power failure, or somebody drops a bomb on it? What happens if we have a, power failure at our location? What happens if the phones go down? What happens if there's human error? What happens if there's a blizzard? Because there's this, in Colorado in winter. And you know, those are just some questions, but I think they have quite a number of these.

>> Andrew Means: Yeah.

>> Beth Kanter: Kind of what if questions, and those are put into a spreadsheet. And then there's contingency, first of all they rate them as to the probability that this risk might happen. And then they have contingencies and backup plans, you know if this happens, these are the steps we're going to take, and this is who's responsible. So, they have this and then it also includes, you know a really robust, crisis communication plan with some of the messaging points put out in advance as best as they can. An appointed spokesperson, so, you know emergency phone trees so they can get the word out to the nonprofits. They also have, with their technology provider, what's called the red phone, I don't know, remember Batman and the red phone? So there's a direct line with somebody at the tech platform, you know, that, so they can get immediate communications, if anything's, you know, happening. So, you know, so all of that is, summarized, you can get it at givingdayplaybook.org, I don't want to sound like a commercial. You know, givingdayplaybook.org, hosted, sponsored by the Knight Foundation, developed by Third Plateau. You know, anybody who's doing a Giving Day or any big event that is, dependent on technology

should.

>> Andrew Means: Mmm hmm.

>> Beth Kanter: You know get a hold of that. I'd also recommend, NTEN, disclaimer, I'm also on the board, but they have ongoing webinars and professional development, and I think like the disaster relief organizations. Have really high level skills in crisis management. And I know that there's webinars and materials on the NTEN website. So that's something to look into, and also, in terms of crisis management, from the nonprofit perspective, again I'm going to point to Kivi Leroux Miller. She wrote an excellent critique.

>> Andrew Means: Yeah.

>> Beth Kanter: Of, crisis management plans that were put into the day, and how different entities handled crisis, the crisis that happened during the fail, and what they should have done. And she's also written extensively for nonprofits on how to develop a crisis plan. So, that's my answer.

>> Andrew Means: Thanks so much, Beth, there are some great resources that people should definitely check out. And as a reminder, for those of you with us today, feel free to chat in questions, we have about another 15 minutes or so, where we can have the discussion keep going, but we definitely want to hear from you. We want to hear your thoughts and get any questions that, from you that you have. But as we kind of continue the conversation, Priscilla, I'd love to hear from you, right, you've run this Giving Day a few times, you've now experienced this kind of glitch, [inaudible] Is this going to change the way that you prepare in the future? And did you see some of the organizations, that you were working with take certain steps that allowed them to better negotiate with tech failure that happened, than maybe some others?

>> Priscilla Enriquez: Well, you know I think it's been said before by both Asha and Beth, that it's really about capacity building, for us.

>> Andrew Means: Yeah.

>> Priscilla Enriquez: And other Community Foundations, organizations, that it's not just about the day, and so I think what we actually saw happen was the nonprofits, have confidence. Because they employ the skills and trainings that we taught them. And the other thing that was really important for us as a community was the role that the board plays. And you know having done this in years past, we would hear horror stories about board and staff division, that they were not aligned. That, you know they can't sell their board on a Giving Day, and so we knew we had to do a lot of work with their boards. So for this year, I mean I, feel confident to say that a lot of nonprofits have the support of their boards to help them execute and then strategize and shift, you know when this debacle happened. And so I think a lot of that, gave them the confidence to tackle all of this going forward. But for us, I think you know, Giving Days in the future, down the road, we'd actually been talking a lot before this year, before May 3rd, about the capacity sustainability of the Community Foundation, to be

able to [inaudible] this day. And back in January, we had a board retreat and talked about, this very subject, taking a look at different models and, decided to start a taskforce. A board and staff, and a community taskforce. So, you know may 3rd definitely elevated the urgency of that and we've already had our first meeting. And Daniel actually, from Third Plateau is facilitating for us and you know that will continue on and we'll have a plan, we hope by July.

>> Andrew Means: Awesome, So also with Giving Tuesday, as you're looking ahead to November, planning your next kind of, so you're already in the midst of all of the work that is to list that. Are you going to do anything differently, in the wake of this Give Local America Day, do you see yourself offering any different, you know, support or services to the organizations participating in Giving Tuesday? How is this experience really shaping the way you guys are thinking about, what's coming up in November?

>> Asha Curran: I mean certainly this was a, a great opportunity to learn. I think that a couple of things, I think that, it's going to make us double down on some things that already you know core to our values and to our mission, in that sense of agnosticism of everybody playing. I'm also really struck by, the importance of just putting as much agency in the hands of the nonprofits as is possible.

>> Andrew Means: Yeah.

>> Asha Curran: Since they're really drivers of all of this. I think that its interesting what Priscilla just spoke to which is that, you know, one thing that I hadn't realized actually, is the sheer amount of resource that goes into preparing for these Giving Days. And I think that when we launched Giving Tuesday, that actually wasn't our idea. What we were encouraging people to do, was to put, minimal resource toward it, and use it as an opportunity to try something new, right. Take small bets, you know experiment, be entrepreneurial with the way that they were engaging on, you know various levels. And I think that the more people are pumping enormous resources the more peril there is, right. Because then, a Giving Day, Giving Tuesday or any other Giving Day, can, make more or less money in any given year. And in any given year, something could happen that diverts global attention away from donating online, right. And so I think that, it has to be about more than that day. So we're being pretty redundant here, but it's an incredibly important point, right. That it has to be about making it an organization stronger, making the nonprofit sector more innovative, making it more collaborative. So that even if the Giving Day itself is not as giant a success as one would have hoped, ultimately we're a stronger sector for whatever happens.

>> Priscilla Enriquez: Exactly.

>> Andrew Means: Yeah, I think that's a really great point. I've even worked at some organizations who, have almost put like so much of their, hope and their budgets and everything into one event, whether it be a Giving Day or, a gala or anything. And if that, if something, you know a blizzard, a technology failure,

any number of things, kind of kills that one event, it can kind of really ruin an organization's budget for the entire year. And I think that's a real challenge with these kind of, as we put more and more concentrated resources and energy into one particular event. And.

>> Asha Curran: Mind if I very briefly add to that, that also, I know this isn't always possible, but for Giving Tuesday at least it's very important that we look at it as a day of not only giving money. And so you look at it as not only money, then you're setting several different metrics that you can shoot for success, right. And so, you know Giving Tuesday last year, for example, this is one of my favorite, talking points was the largest organ donation registration in history.

>> Priscilla Enriquez: Wow.

>> Andrew Means: Yeah, that's awesome.

>> Asha Curran: And that's a really cool success metric, that we didn't set, because why would we have? But now we can say it and it's really, really meaningful. And a lot of volunteers have happened, and a lot of acts of kindness to others, one organization in Baltimore did, a sort of mix of all of these things which was. They unlocked donations for every story, that someone shared online about connecting with another person, making another person's day better or life better.

>> Beth Kanter: Yeah.

>> Asha Curran: And so those kinds of campaigns, I think are especially meaningful but the more than money thing is something that I think we'll double down on too.

>> Beth Kanter: Yeah.

>> Andrew Means: Yeah, I'd like to, we have about you know 8 more minutes before I want to turn to questions and I'd love for each of you to think about, what has been what's the biggest lesson, and learning from this experience. What's the silver lining, right, like what can we take from this, and learn from so that we can do something better. You know and really how should we begin distributing and ensuring that we don't just [inaudible] this kind of failure in the future? So Beth, can I start with you? Just, what, what can we take from this, learn from it, and use to have more successful, events in the future?

>> Beth Kanter: Sure, sure, we started out with you know, okay, we have this big technology failure, fail, okay. And it can happen to anybody. It just so happened that this was a pretty scaled failure. And, you know it could be really easy just to say oh, it's a technical problem, and, you know and whatever, you know thing it is, you know as, you know is it bandwidth or is it hardware, or lack of a , you know, mitigation plan, or whatever. You know, we're going to just fix up that little problem with this software and everything will be fine. But I think the silver lining in this is that it's giving us the opportunity to have

this conversation and I really think that, Asha hit it on the head with, you know, it's really about innovation, it's really about trying things new. It gives us an opportunity to rethink, maybe you know what Giving Day models could be, you know. Are they, is it really, you know one model is to have a centralized Giving Day umbrella, you know the event happens in a concentrated 24 hour period, or one day, in many communities. And that's you know, one way to scale, but are there other ways to scale? And I think, you know, you know as a kicking off a giving season, as Giving Tuesday does, more than just asking for money. Making giving in terms of volunteers, [inaudible] donations, or even just talking about giving, and getting more people to give. So what I think this is is an opportunity, you know not for us to like feel, to continue to feel bad about this, whatever technology, or the bad thing that happened. But it's a good thing because it's opening us to the possibility of innovation which could lead to better results and higher impact on our sector. And ultimately scale telepathy and giving.

>> Andrew Means: Awesome, Priscilla, what are your thoughts?

>> Priscilla Enriquez: Well just you know in the, context of the tech failure, you know, I think for us, it was what's the frame and lens in which we want to characterize that day. And I think by maintaining positivity, communications is really important, I would reminisce if I didn't acknowledge the media and the role that they played in helping us to get the word out. Keep the giving going, let them know that the Foundation's working behind the scenes trying to figure it out. And then of course, the nonprofits taking that communications step further by, you know equally being positive on social media, online, communicating with their board and donors. And I think, you know that was a silver lining for us, and it spoke a lot to, the technology as well. Because we didn't see or experience that level of communications from our vendor.

>> Andrew Means: Hmm, Asha, how about you, what do you take away from this experience? And what should we do as a sector really take away from this experience?

>> Asha Curran: So I would say a couple, a bunch of things I learned. But I'll name two of them specifically. In the interest of time. So I think the first one is, the importance of transparency, which I think is just jumping off what Priscilla said about communication. I think it's really important to be transparent when this kind of thing happens at every single level. Because everything's going to come out, and it's going to be, it's better if it just gets sort of openly said, in the spirit of, learning, right. And then sharing that learning and making us all better. And we've certainly seen Giving Tuesday work the best when there is transparency of data, when there is a really generative collaborative spirit, to everything. So I would say that's one real lesson learned, how very, very important that is. And then, I think the other thing is the importance of agility. The ability to pivot in a crisis. And I think we saw that with this, I think we don't, we wish that the circumstances hadn't made that necessary, but I think, you know Priscilla shared that [inaudible] prior to our webinar of the,

the social media responses of the nonprofits and so funny and rye, and really, really impressive. And I know that donors, as well, try to pivot.

>> Andrew Means: Yeah.

>> Asha Curran: And to put physical checks into the hands of the nonprofits, I mean they wanted to make those donations, they were going to find any way they could to. So I think we saw, you know we saw important lessons and on transparency and agility.

>> Beth Kanter: I just wanted to add one other thing to your point about learning and the opportunity for continued learning. There are people, funders and others in this sector who have been interested in Giving Days, one I wanted to call specifically was the Knight Foundation, and Third Plateau, and there is, a report coming out, in the next couple weeks or so, or over the summer, that's going to summarize lessons learned from, their work and investing in Giving Days. And I know that they'll be, the report will be distributed, there'll probably be a webinar and lots of blog posts. So I just want to, in addition to what Markets for Good is doing, and what people are continuing to write about for us to keep on learning about Giving Days.

>> Andrew Means: No, I think it's really important, I think the work that Markets for Good, and, the Knight Foundation is supporting and all, that's really important, we can't just have this happen again and again and again. We need to learn from this experience, and figure out how can we help prevent this kind of failure from happening in the future. And to that point, I want to turn to some questions that have been submitted, and if you have them, feel free to keep sending them on in through the chat at the chat box on the side there. But Tracy, from a nonprofit in Sacramento, was saying that a lot of the organizations in her community, don't have tons of resources around or experience with communication tools, social media, let alone, any crisis communication planning. Do you any of you and especially Asha and Priscilla, this is probably most relevant to the organizations, but do you see, lead up to a Giving Day or a giving program like this offering opportunities for training and education on communication, crisis communication best practices, things of that nature.

>> Priscilla Enriquez: Absolutely and I, we do spend here in Sacramento, a lot of time on social media, and communication., But I think the other lesson learned in this round was talking to the media. You know, being live on TV, doing a radio interview. Those are actual skills, and so I think that, you know if we do this again, that's something that we might want to concentrate on. And then in terms of crisis planning, again, it's you know how do you control that message? You know it's so easy to get sucked into the negativity and the failure, and you know, and then suddenly that's all you say. And it's not instilling hope and you know, making lemonade. And so I think that's the strategic part of the training that we would, I would hope anyone would address. But I think that those are some of the things that we might want to think about.

>> Andrew Means: Absolutely. One of the other questions that come in, which

I think is a really interesting one. This is from Leslie, she says alright, clearly Kimbia's failure or I'll say part of the failure, was due to human error. And a lack of understanding of how their new backend donor data access selection worked. So if we just move to a new platform, a new technology, what can we do to ensure that human error also won't just happen again? And how do we, you know choose the right kind of platform to get behind?

>> Beth Kanter: Okay, I actually.

>> Andrew Means: Go for it.

>> Beth Kanter: You know you had asked me what do organizations need to do to be successful within Giving Days moving forward. Or, in addition to a crisis plan, I think that organizations need to do their due diligence about, around selecting technology vendors. It's too easy, you know sometimes we may not have the expertise or wow, were so busy delivering and doing our other programs that this tech thing like, that's going to take too much time so I'll just go with what she used. I'll have what she's having, you know. Because it takes research and testing, and a little bit of discipline. So I would recommend a formal vendor review process. And that's again, the kind of training that you can get from NTEN or, and also bringing in, people with that expertise onto your board. And I know in Minnesota.

>> Andrew Means: Mmm.

>> Beth Kanter: After they experienced this, they had a very formal, technology vendor selection, which was really rigorous. And I mean it's a whole host of questions, asking about the capacity of the technology provider. From, not only from their staff and knowledge their backup procedures, you know, all the wonky.

>> Andrew Means: Yeah.

>> Beth Kanter: Server bandwidth, server forum stuff. That, you know that there are people who have expertise in that area, can like look at and make an assessment. And then just, and you know go with your best bet.

>> Andrew Means: Hmm.

>> Priscilla Enriquez: Yeah, I just want to say that, I don't think we know what happened yet, with Kimbia, you know. They've made a public statement which is on their website but I think a lot of that still needs to be translated. I think the other thing too, about, there is no fail safe technology, platform. You know I think it was in Give Minnesota, they had a breakdown and moved to another vendor and then experienced this, well actually they haven't yet, let's hope they don't. But, so, you know I think if you pin yourselves on that one be all end all product, there's, it's not going to work. And so I think it's just being prepared for any kind of contingency and in our case, it was learn because our contingency was based upon the donation form working on the platform. And the when everything just flew out the window, we had to, you know build a

plane as we were flying it. So, I would say it's more the soft, capacity building stuff, you know, it's not the hardware and the software that's really going to make the day, it's everything else.

>> Andrew Means: Absolutely. I think one of the things that this has raised for me, and it's something that you know I think a lot about. Is actually the quality too, of technology, access and provision within the sector. I think when we need to become more educated as consumers. I want to see, you know a lot of the work I try to do, is helping educate, nonprofits on, what's good in my case, data technology looks like, but extrapolate that to everything. Because we need to, to really know how to select good vendors. We need to know what these things actually can cost to get good high quality vendors, in this space. Because you know, again our organizations are often times, so dependent upon technology. But then obviously, you know, we need to choose high quality vendors, and high quality people in technology and then have all of the other contingency plans in place. Because even good technology, can fail from time to time. Just real quick Leslie, oh go head.

>> Beth Kanter: I was going to say, just one more quick point to that and sort of a takeaway from what Priscilla has said and also the experience of you know working with a learning community and how important it is to learn from your colleagues. And not be.

>> Andrew Means: Mmm.

>> Beth Kanter: In your own community buried under doing this alone because, you know there's expertise out there and that can help. You know even if, you know when one community experienced a problem and has come up with a solution, if its shared then, as broadly as possible with other colleagues, then they're once step ahead. It rises, it lifts all the boats so to speak.

>> Asha Curran: Can I add something to that?

>> Andrew Means: Absolutely.

>> Asha Curran: Just one more on the whole, you know value of transparency, and again, the value of the distributed model. I think that giving platforms are a sort of not very well understood world. Even in a lot of the.

>> Andrew Means: Yeah.

>> Asha Curran: Nonprofit sector. I know certainly, for myself, I had no idea the first year when we launched this, that there are you know hundred plus giving platforms. I thought there were four or something like that. There's a lot and some of them are for profits and some of them are nonprofits and they serve different constituencies and different kinds of clients. They charge very different kinds of fees. The public understands that even less, I think. And so I think again, the more, the more daylight on that, the better because then nonprofits are better able to do their due diligence to compare different vendors and really understand what might be right for them. And the more the vendors

are as well, really challenged to be as generous on those Giving Days as they can be.

>> Andrew Means: I think you're absolutely right, I think transparency is a must, when it comes to this kind of stuff. And we need to, really demand, I think as clients, more transparency so we can make well educated decisions. One just comment from Whitney. She said actually, [inaudible] went with Kimbia, And so [inaudible] the chance that something goes wrong, even with new technology and you need to be prepared. And Leslie had asked, you know what is NTEN. So NTEN is, I'll let, actually Beth answer that, because she's so involved with NTEN. But, yeah we've been suing that short beak, but if you want to share what NTEN is that'd be great.

>> Beth Kanter: Yeah, I've been, well I've been a nonprofit technology person since, the file started so I always say it stands for nonprofit technology network and it's the place for any nonprofit who's doing tech work, they have annual conference for the NTC, they have lots of education, and online learning. I've been, I actually have the records for attending the conference for 17 years consecutively. So I think I'm the only one, next year will be 18. So if you want to learn about technology, vendors, you know and, up your tech chop so to speak, NTEN is the conference to go to. And the organization to join.

>> Andrew Means: Absolutely they're a great resource for organizations and nonprofits trying to, better understand technology and make better investments and decisions. Alright so I want to talk, we had a couple questions around, the Giving Days that are relied on centralized technologies versus distributed technology. What are the, the benefits and the risks of both? Or the benefits and disadvantages of both?

>> Priscilla Enriquez: Well for us in Sacramento, I think having it on one day, creates this momentum and well of, positivity and information, and support for the nonprofits in a community. So that giving day, everything converges together. You know we work with the media, the social media's off the hook, you know we've got our hashtag. So it just creates all of this activity and momentum and energy that something great and big is happening in our community.

>> Andrew Means: Mmm.

>> Priscilla Enriquez: And then you know it's from a communication standpoint, you know there's one website you go to, you know so you can direct people to that one website. And of course, and that begs the question, making sure that technology can manage all of that, right. And so, you know, it's like big day took over the Sacramento region and we had [inaudible] so there's no way anybody, could not know about it, It had become ubiquitous and so because of that, we feel confident we could meet our goals again, assuming everything is working. So for that, for those reasons, having it on one day on a centralized platform, has its benefits.

>> Andrew Means: Asha do you want to address this question as well?

>> Asha Curran: Yeah I would, I mean, obviously I'm biased, we have a very specific distributed model, but I would say that the benefit that I could see of a, more centralized model would be clearly data. You know, collecting, you know amount of dollars raised and other, you know other forms of measurement after Giving Tuesday is a huge undertaking, and relies on the collaboration of a vast amount of people at organizations. That has a flipside though, which is that we're really challenging ourselves every year, to, be in touch with more platforms, be in touch with more nonprofits, to get more people to be giving their data to us to then turn into useful and actionable tools, as you know, Andrew. To turn to back out there into the sector.

>> Andrew Means: Yep.

>> Asha Curran: The drawback I think of a centralized [inaudible] is this exact danger, right. The whole reason that we're here having this conversation and then I would also say the other drawback from a Giving Tuesday perspective, is that there would be less buy in from across the entire sector. Because it's seen as being owned more by that centralized technology. And it's, you know it's a great feeling to have the day feel that it's owned by everyone. That there [inaudible].

>> Beth Kanter: I'd actually follow up on Asha's point too. You know, having worked with both models and I, I think that, it's good to have, you know, I'm kind of like it depends on whether it's the right fit for the situation and certain instances a centralized model is the right approach to go. Especially if it's maybe a community foundation and it's sort of part of their role in a community and there's lots of benefits to the Community Foundation. Decentralized model has, you know, but then the flipside to that for the decentralized model, is that you know, it's not owned by anybody, You know.

>> Andrew Means: Mmm.

>> Beth Kanter: It's owned by the community, so it's not branded by one entity and, so that's kind of like the tradeoff for a local community. And I think the key value, and I know we said this before, the decentralized model is that, not everybody, not one, campaign host has to do every, all the heavy lifting. It takes some of that away. Which I know, is exhausting and is, you know is a stretch for many hosts.

>> Priscilla Enriquez: Yeah. Yeah I also think it depends on what your goals are. You know if your goal is community engagement then I think either model could work and I think Asha, I'm glad you brought up data, because we love the data that we get on the back end. But of course when the tech doesn't work, that's gone, you know. And every year we produce a report to the community that's full of data, and stories and we're trying to figure out, what's that going to look like this year. So, anyway.

>> Andrew Means: Well I really want to thank all of you, Asha, Beth, Priscilla, for joining us and helping kickoff this Markets for Good round table, and kind of

series. And we're, for all of the conversations we've had, I think we've learned a lot of things. I think, you know we've heard again and again, the importance of transparency. The importance of communication. The importance to be ready for things to fail. We have to remember that, you know when we're developing these days, and we're relying on certain pieces of technology and we're you know especially when they're put under a level of stress, they might not, you know be used to. We have to be prepared for things to fail, we need to have contingency plans, we need to, to have you know the plan B's and the plan C's. You need to find those people within your organization who love doing those plan B's and C's, and D's and get them involved in preparing for these kinds of Giving Days, in particular. Thank you again to everyone for joining us today. As we said at the beginning, we'll, be, this was recorded, it'll be on the Markets for Good website, it'll also be followed up by some other pieces and comments, and from other perspectives as well. And so be sure to keep checking back to Markets for Good to learn more about how this conversation is, continuing to evolve and especially as we learn more. And we're still, as Priscilla mentioned, we're still kind of learning what actually happened with on this Giving Day, on May 3rd, and as that continues to come to light, I'm sure we'll do our best to share it through the Markets for Good platform and community. So thank you again to everyone, thank you Markets for Good, thank you Asha, Beth and Priscilla for joining us. And thank you to everyone for talking a little bit of time out of your day to, sit in on this conversation and join in. We look forward to hearing from you and, enjoy the rest of your day.

>> Asha Curran: Thank you.

>> Priscilla Enriquez: Thank you.

>> Beth Kanter: Thank you.

>> Andrew Means: Thanks everyone.