

[Andrew Means:] Hi everyone. Welcome. My name is Andrew Means. I am the head of the Uptake Foundation and founder of Data Analysts for Social Good. I want to thank you for joining Markets For Good virtual roundtable on Giving Day Technology. We're going to be focusing on, today's chat will be focusing on the latest chapter in the Market For Good summer series on Giving Day lesson, where we've been discussing the role of digital infrastructure in the social sector and what we can learn from the technology challenges experienced during this year's Give Local America Day campaign. Check out the Markets For Good website for the previous post in this series and the last podcast from the previous roundtable. Before we get into today's discussion, let's just go over a few housekeeping details. For all of our audience members out there today, your mics will be muted for the length of the discussion. But we do want to hear your thoughts and questions. So, please use the chat functionality to chime in and submit any questions that you may have for the roundtable. I'm going to be filtering and moderating through those and bringing them up as possible. And we'll also have some dedicated Q and A time at the end of our conversation. We'll try to cover as many of them as we can, but no doubt, we won't be able to get to every answer, and answer every question that comes in. So stay tuned to the Markets For Good website for more opportunities to learn, engage, and provide your own input as we continue our Giving Day lesson series. We're recording and sharing out this roundtable on the Markets For Good website and following it up with even more posts and viewpoints about digital infrastructure for the social sector. For today's conversation, I'm really pleased to introduce our panel. We're joined by Lori Finch, Vice President of Community Giving For Kimbia and Give Local America, Jamie McDonald, Founder of Generosity Inc and former chief giving officer at Network for Good, Charlie Mulligan, CEO and co-Founder of GiveGab, and Charles "Chic" Naumer, CEO of CiviCore. Thank you all for taking time to join us. At our last roundtable we were talking about getting the Giving Day Tech challenges and some of the ways that nonprofit community foundations and others can best prepare for these really important fundraising events when technology is so critical. Today, we want to take a closer look at the technology behind Giving Day and how these fundraising platforms and more can make good on the promise of digital infrastructure to support the social sector. I want to begin by discussing how technology is supporting and shaping Giving Day and [inaudible] in general. Jamie, you founded the crowdfunding platform GiveCorps in 2011, and later joined the Network for Good team when they were acquired by, when they acquired GiveCorps, and are now spearheading Generosity Inc. From your perspective, how has online fundraising changed over the last several years. [Jamie McDonald:] I think that, you know, it's increasingly recognized by nonprofits of all sizes as a critical component of their fundraising, and I think that that's a realization that, you know, has really accelerated in the last couple of years. For the first couple of years that we had GiveCorps, [inaudible] nonprofits unless they were very social activism or millennial oriented, they really saw online giving as sort of a necessary evil. Did invest the time or the energy into understanding how to do it well and how to maximize the use of their tools. I think that, you know, nonprofits now across

the board really recognize that online giving is not just a channel anymore. It's really the future of giving and that they've got to start to really reorient their thinking and priorities around how to sort of leverage the online channel, the digital channels, as sort of a really core element of their online infrastructure. I think correspondingly we've seen that getting events like Giving Days have helped nonprofits rapidly gain understanding about how to leverage the digital channel. And we've seen it on both dimensions. We've seen that people have learned to do it well. We've also seen the learning that comes from sort of mistakes and challenges that nonprofits run into when they explore these kinds of opportunities. I'm closest to the work that's done in higher-ed Giving Days and on Giving Tuesday, but we certainly think that the rapid learning that's happened through Giving Days has been another really important development, you know, in terms of [inaudible] nonprofits that are involved with online giving. I think you're muted Andrew. [Andrew Means:] That makes a lot of sense. Chic, from your perspective, CiviCore, can you guys not hear me right now? [Jamie McDonald:] I can hear you now. [Andrew Means:] I should be coming through. Am I coming through? [Jamie McDonald:] Yep. [Andrew Means:] Chic, can you hear me? Alright, good. CiviCore has been around since 2000 and has been supporting Giving Days [multiple speakers]. [inaudible] technology that has shaped these big fundraising days over the years and how they've grown bigger and bigger and what lessons you've learned. Yeah, Chic, you can go ahead. [Charles "Chic" Naumer:] Okay. Thanks Andrew. And thanks for moderating this roundtable, Andrew. These are, we really appreciate being included and we really think that's a very valuable service. This is a great question and, you know, this is a question that we think a lot about is how can we make these days better and how can we continue to build the momentum behind these days. So for CiviCore, we got started, as you said, about eight years ago here in Colorado where we're based. We worked with Community First Foundation in Colorado, and I think the first Gives Day we did was about a hundred thousand in Colorado. Last year, 8 years later, our Gives Day was over 28 million dollars, which is a pretty significant growth rate over eight years. In addition to that 28 million dollars that came in on the Gives Day, an additional 10 million dollars came in outside of the Gives Day. So, over 38 million dollars total, which is pretty good. There's been several other Gives Day that we've hosted that have also seen really great growth rates. And I know there's many others that we don't host that have done very, very well too. So overall we're really very excited by, I think, the potential for Gives Days to really build philanthropy at a local level. Before I address your question specifically around technology, I also want to acknowledge that, you know, CiviCore, we see ourselves as a part of the effort and acknowledge, you know, just how much effort goes into it by our partners at the community level and how much we value those partnerships because they really deserve a great level of appreciation and respect for the work that they do. But in terms of your specific question on technology and how it shaped these big fundraising days, I think one lesson that we've learned is how important trust is and building trust at a local level. And like I said, we're a part of that. Our part of it is the technology. And so our first

priority is reliability and security. If those systems aren't reliable and they're not secure, nothing else matters. And I think we take that responsibility very, very seriously. The second thing that I think that we've learned over the course of the last eight years is we've become a very big believer in the year-round platform, so keeping the platform up for 365 days a year instead of just pulling it up for one day a year. And we think that also speaks of that element of trust. It builds infrastructure in the community, donors become familiar with using it, nonprofits use it on a day-to-day basis, and it really kind of builds the momentum behind the technology and enhances giving on that day. So I think that's one of the major lessons we've learned. Usability and functionality, this is, we always look at our usability and functionality. We want to create a easy to use experience. So we focus on user experience and the functionality that's going to help build momentum behind these days. And so the types of functionalities that we've been developing are, you know, fundraisers, like campaign fundraisers. So these can be team or peer to peer fundraisers. We see that building a lot of excitement, a lot of momentum in the communities, creating a network effect where you have donors who are promoting their campaigns, nonprofits promoting their campaigns, and really kind of spreading the effort of, you know, encouraging the community to come behind these days. We also like having robust profiles around the nonprofits that are on the site. We do a lot of gamification which includes leaderboards, prizes, competitions, real time tickers that can be displayed on our media partner websites, on billboards, on mobile apps. We see that as really another technique that builds excitement around the day. We're doing a lot of work around corporate matching functionality, social media integration, and then always working to make sure that it's a very smooth process in terms of donation, donating, and allowing donors to schedule recurring donations and schedule their donations in advance. So for example, I think on Colorado Gives Day, we had about 8 million dollars that was prescheduled for the day. So that's a technique that we also really like to allow donors the flexibility to schedule their gifts before the day. [Andrew Means:] Chic, are you seeing with some of these features you're talking about like gamification, social media integration, the idea of recurring gifts and setting up those in super simple ways, are you saying that actually translate into increased giving as well? So, is performance correlated with these kinds of functionalities? [Charles "Chic" Naumer:] Yes, I believe it is. It's, you know, sometimes hard to measure that, but we certainly see a lot of activity around these types of things and, you know, we get anecdotal reports of people saying, I was just glued to the ticker all day, you know. I was so excited that you broke twenty five million or those types of things. Or my campaign, I couldn't believe that I raised 3000 dollars on my personal campaign page for the nonprofit that I really believe in. So we get a lot of those stories, and those are so exciting for us. We just love to see that type of thing happening in our community. [Andrew Means:] Awesome. Charlie. So GiveGab is a bit younger. You guys started in 2011 and you're relatively new to Giving Days. Can you tell us a little bit about what led you to start GiveGab? You know, what kind of space in the market maybe did you see? And how you think technology can best support Giving Days as well

as kind of other online giving areas? [Charlie Mulligan:] Yeah, sure. Thanks, Andrew. Actually, the idea for GiveGab came after I read an article on how people that volunteer once a month increase their happiness as if they doubled their salary. And I found this to be really fascinating. So that idea kind of evolved into GiveGab. And we started from the ground up focusing really on volunteers and donors and how to build a relationship between them and nonprofits. And so when we, you know, eventually made our way to Giving Days, by that point we had worked with thousands of nonprofits to really understand ways of how to build a long-term relationship. And so I think technology is great in many levels and I think it really can make donations easier and faster and have access to donors you didn't have before. But I think as, you know, as the transactional piece was the first piece of it. I think where it can evolve into is really helping nonprofits build long-term relationships with donors. Just remembering, well, one getting things out of the way that they would have to do that is the [inaudible] that keeps them from building that relationship. And the other thing is to really help them do simple things like giving, you know, donors and volunteers and supporters access to information about a nonprofit, to understand what's happening there, to get updates. But also, you know, we always call it, you need to pay your volunteers and you need to pay your donors. It's just non-monetary compensation. But you need to make them feel great, you need to make them feel like they're part of something bigger than they are, you need to let them see what's happening at the nonprofits. These are really the forms of non-monetary compensation they demand if you want to keep them coming back. And so that's where I think technology, not just with GiveGab, but across the board, is really exciting over the next several years. Because I think that is where it can have the biggest impact on nonprofits and really help them become kind of better at forming those relationships and strengthening them. [Andrew Means:] I think it's so interesting how much the topics of relationships and trust and these kind of things come up, and how technology can play a role in facilitating those relationships between organizations and their supporters. So, Lori, Kimbia is fairly unique in the fact that it not only offers a technology platform, but also launched a national fundraising campaign, Give Local America. Can you tell us a little bit about the approach you guys take in expanding from its platform services to create Give Local America as a major crowdfunding campaign, you know, both connected to you and outside of your technology. [Lori Finch:] Sure. Well, let's see. I mean, Give Local America is really about, I would say, my passion and Kimbia's passion about building local communities through support organizations, you know, help them raise funds that they may not have access to. You know, generate twenty-five percent to forty percent new donors for them in events. But, really, if we want to look back at like how this started is that back in 2010, Kimbia did their first Giving Day with one of our community partners in New Haven. And I joined in 2011, coming actually from a community foundation. And we really thought, you know, this was a very powerful way, just looking at the stories that we saw, for communities to come together and support each other. We saw, we like to dream big, and really saw the opportunity of having this local day be a part of

a much bigger thing so that we could have communities come together all on the same day and participate in an event that was not just a success in their community, but something that was much larger. And with that really came Give Local America. We got really tied in with community foundations, again, partially because of my personal background and passion and really seeing them as a driving force behind local giving. And from there it kind of grew. In 2014 when we did our first event, I don't know that any of us had any expectations of what it would be, but, you know, we had forty plus community leads come together and raise well over 50 million dollars in twenty-four hours. And I said, this is something that we think, is something that we want to support and we're going to continue to support going forward. So it was a lot of Kimbia, both our leadership as well as just our own personal background idea that we just think that this could be so much more powerful than just one single community, but really having communities come together on one day. [Andrew Means:] That's absolutely right. Thanks so much for sharing. I want to talk a little bit about when technology fails, right. As technologists, we probably all both accept the fact that technology fails and try to do everything that we can to prevent it from failing and from breaking. But Chic, so after this year's Give Local America Day, you wrote in a blog post for CiviCore that by accepting the inevitability of technology failures, we have focused our thinking towards mitigating the impact of potential failures in addition to avoiding them. Can you tell us a little bit more about this approach and how we can best mitigate and respond to inevitable technology failures that certainly occur. [Charles "Chic" Naumer:] Yes, thank you Andrew. And, yeah, I think that that statement really kind of reflects some of the evolution that we've had at CiviCore over the course of the last 8 years. I think that, you know, to be honest, we have to be honest, I mean, technology does fail. Technology is not infallible and people aren't infallible either. And, you know, of course, our first effort is to prevent failure. But we've recognized that we need to put equal effort into mitigating the impact of failure. And I think, you know, in the context of these Gives Days, I think that, you know, when you realize the cost of failure, it really helps you put that into perspective. You know, I mean, there are so many people, in terms of time and dollars, that go into promoting these Gives Days that, you know, that failure is really a hard thing to see. And that's what's influenced our approach to say, okay, we're going to put just as much time into preventing failure, I mean, mitigating failure as we are into preventing failure. So, you know, on the preventing side, we of course, you know, work very hard to select the best providers, but we're all reliant on third-parties to some extent, you know. We're a big fan of Amazon AWS service and all of the capabilities that they offer now. We also spend a lot of time utilizing best practice software methodologies such as code review and audit and testing and locking code, you know, evolving our code base, so we're taking advantage of the latest technology, etc. But that's really half the job. The second half of the job is to say, okay, what if there is a failure, what are we going to do, and go through detailed contingency planning around that. And sometimes, you know, software developers, that's hard to do because you like building technology, you know, and it's almost, you have to

take on this pessimistic mindset saying, you know, failure is going to happen, and that's what we've done in order to really create the discipline that we run around mitigating failure. We have to assume that a failure is going to occur. So we do that, as I said, we do extensive contingency planning. We look at redundancy at all levels of the system, you know, hardware and software. So we look at having backup hardware systems, you know. If Amazon goes down, we can roll over to another data center. We can even roll over to Google's platform, doing that type of thing. And then we also have a completely separate code base in case there is a software issue or a software infrastructure issue that isn't a hardware related issue but can't be fixed. We have a completely independent code base at a different provider that we roll over to in case of something that severe. So that's, that kind of describes some of our approach and the evolution of our thinking. [Andrew Meads:] Absolutely. It's amazing. I mean, right, we're all dependent on third parties. Sometimes those third parties fail us. I mean, even AWS went down I think about a year ago and everyone freaked out because they were like Netflix and everything is like connected to AWS, like what are we going to do? But these things happen, and I appreciate your perspective on the importance of mitigation and backup plans and all of those kind of best practices from a technology perspective. Charlie, given that you're running a slightly a younger organization, you have a new perspective. What are you guys doing and how can online fundraising platforms in general ensure that Giving Day technology works when it's needed most? [Charlie Mulligan:] Yeah, it's a great question. We actually started at the very beginning when I thought of this idea in 2011. My vision was to have a platform that was huge, that had millions of people using it, that had tens of thousands or hundreds of thousands of nonprofits. So I needed something that was highly scalable. So the first thing that I did was brought on our CTO Aaron Godert who was working in that field, working 4.0, but he also did his master's thesis on scalable technologies. And he was fortunate enough, his advisor on that was a guy by the name of Werner Vogels who essentially was one of the people that created cloud technologies. He's now the CTO of Amazon and created Amazon web services. So we had basically an Amazon web services disciple as our CTO. So we didn't create a single line of code before we already decided that we were going to be a massive website that could handle a huge amount of traffic. So it's not just a [inaudible] that we have created to be very scalable, but literally every developer we hire is well-versed in the entire process that you need to make sure that this is something that's very reliable. We also, you know, we just make sure that that's part of the habits we do. That's one of the reasons why we have a hundred percent uptime guarantee and that we've never been down. It doesn't mean we can't ever go down, that would be a pretty foolish thing to say. But what it means is that we're responsible when it does. And I think that really puts a lot of discipline inside us because we would feel the pain if we ever, for Giving Day, if it went down. But I think beyond that, I think, you know, we're at the point now where just making sure your tech is modern and scalable and stays up is something that is a necessary feature. But what we really spend our time doing is making sure our user experience is cutting-edge,

because I think this is something that's advancing so quickly and your donors might be donating on your website or your platform. But they're buying products from businesses across the web and the expectations of the user experience and how easy the donation flow is and how easy it is to pay money, but also how beautiful it looks and how everything flows, that is growing significantly. And so it's something that we need to be on the cutting-edge, because if you really want to build a long-term relationship with your donors, you have to give them the best possible experience. Not the best possible nonprofit experience, the best possible experience period, when they are making a transaction online or learning about your nonprofit online. So this is something we're obsessed with. And I think, you know, I feel fortunate that we started in 2011 because we started, you know, well after kind of cloud services were becoming the norm and it made it easier for us to start that from the very beginning to make it part of our [inaudible]. [Andrew Means:] Yeah, and that's absolutely true. Jamie, you've provided guidance to several major Giving Day campaigns including Be More Gives More in Baltimore, Giving Tuesday, and others across the country. So what kind of advice can you provide when it comes to choosing, planning for, and using technology for a big Giving Day? [Jamie McDonald:] This is a great discussion and I appreciate the question because I really sort of think that the give local experience, and it's unfortunate that any platform had to be the one where it happens. Because it was going to happen to somebody and so Lori I feel for what you guys went through. It's a rough, you know, rough all the way around. But I think that if there's a silver lining that comes out of an experience like that it's that my guidance has always been that it's really incumbent upon the nonprofits to be their own best advocates for the technology that they use and for the way that they prepare for inevitable problems. And I think that kind of is on two levels. So I think from the platform perspective, I think that nonprofits need to arm themselves with a bank of questions that they ask their potential platform provider, you know, so that they understand what accountability they can expect should there be a technology problem. What is the provider's answer ahead of time for what happens if something goes down? And it's, they're sort of like the worst-case scenario, like it goes down for hours and hours and hours and you can't, you know, you can't sort of do your day as you planned. And then there's sort of, on the other end of the spectrum, you know, goes down for five minutes, kind of, what's your strategy for redeployment or for redundancy? So, you know, there's a set of questions in there, so I think that's a piece of it. They really need to ask those hard questions of their providers and they need to decide, do you want to participate on a platform that isn't really prepared for those kind of answers? I think that the other accountability question that people can ask is, if there's down time, am I still paying you my fees? Get to the nuts and bolts of what the real, you know, the heart of the matter is, you know. You want to raise your money, but you also want to understand whether the provider themselves is sort of in the same boat with you should there be a problem. I think that the other dimension of what nonprofits have to evaluate is their own process should there be a problem with their provider. So I've always guided nonprofits that work with us at GiveCorps

and then I've worked with since that time around the country on what their backup plan is if their provider goes down in the midst of a Giving Day. How do they move people to their own traditional online giving site? What's the communications plan? How, you know, at what point do they cut the cord? You know, how much time do you, you know, do you give your provider to kind of come back online? And then how you articulate that transition through your marketing. Now for some really small nonprofits, it's nearly impossible for them to recover. Right, they just don't have the capacity to redeploy. It's really unfortunate. But for most nonprofits, if they think these things through ahead of time and just have a couple of simple email social posts and sort of that redirection plan ready, then they lose the benefit of the sort of the mass marketing that's coming, you know, as a result of the campaign and the tickers and the gamification, some of that other stuff. But they keep their Giving Day going through the, you know, sort of the best sort of second choice that they can, and it's really well worth nonprofits' time to just be prepared for that possibility. [Andrew Means:] Do you feel that most nonprofits have the sophistication and knowledge to really push their providers, their technology providers on some of these questions? [Jamie McDonald:] I don't think that they do. But I think that we as technology, you know, experts, should be telling them the questions to ask, that some of us should be putting that information out there. And I have done it in a couple of posts. I know others are as well. But I think that there should be a set of questions that, you know, is pretty widely circulated when people are considering participating in Giving Days on a centralized platform so that they are armed with the ability to ask those questions. [Andrew Means:] Absolutely. I think the need for resources there is huge, and I think we can do more to help provide that kind of guidance. So, Lori, recently Kimbia released their third party reports on this year's Give Local America Day. We don't need to rehash everything here. But can you just tell us a little bit about what you've learned, how you're responding, and if you have any take-aways for [inaudible] tech providers as well as nonprofits and community foundations and how to navigate some of the challenges that you guys face? [Lori Finch:] Yeah, great question. You know, we've done hundreds of these events, and we've done them very successfully. And then unfortunately, you know, when you fail and you fail fantastically as I say, you have the opportunity to really, like, learn what you should be doing, what you could be doing, what your clients could be doing, and really how to partner to make the best of what happened. So I think from the perspective of, you know, what we learned is, you know, we need to do a better job working with our clients to have backup plans. So not only our own backup plans, but their backup plans. We saw, like I said, we saw forty-seven different ways communities were reacted and came together. We saw a lot of our communities come together and have tremendous success, as I say, through their own heroics. I mean, well over 60 million dollars was raised in forty-eight hours, which is pretty incredible. But, you know, we really learned that, you know, we have to think, as many people on the panel aside or on this roundtable aside, you know, technology failures are sort of inevitable. You have to do a better job of preparing for that, and like we said, preparing, and Jamie I really appreciated



your comment about the nonprofits and our clients to be able to respond should those. So, you know, plan Bs and plan Cs, having, you know, certain measures of accountability with other providers that you're reliant on, having all sorts of processes in place and having a really, really, I would say, crisis communications plan. We'll be going into a webinar immediately following this reviewing our own crisis communication plans should this happen in the future, but then also really working with our clients to do that. And I think, you know, we are, we're really committed to working with our clients to come up with, you know, their plan Bs and Cs and helping through this. And, you know, we're doubling down and investing in what we need to do to make sure that this never happens again. [Andrew Means:] Absolutely. So I was just pinged through the chat mechanism here. But actually if you go over to the Markets For Good website, there is an article there about how to choose Giving Day technology and how to ask some of those questions. So be sure to check that out if you're a nonprofit looking like this. One of the things that I want to pit in the conversation to you, and any one of you can really jump in with this question, is a topic of security and data security in particular. From my perspective, you know, I work with data all day long and that's kind of the area that a lot of my focus is. So I'll be curious how some of your organizations and how technology providers, let's say, generally, are beginning to think about data, data ownership, privacy, data policies when it comes to how they work with their clients, in this case nonprofits. So how are some of you, or how are some of your peers thinking about some of those issues. [Jamie McDonald:] I can talk about it from my perspective as one who is not tied to any particular technology platform, right. I think I'm the only one here now who's agnostic. But, you know, I think that we're, so there's a few dimensions of data. I think that there's a lot of self-learning that can happen for platforms as they evaluate sort of the spectrum of nonprofits that they serve, and they, you know, that can happen at the donor level, at the nonprofit level, in the sector, from a sector perspective. You know, I think across the industry, you know, one of the things that I don't think is happening enough is enough data sharing among platforms on automatized [assumed spelling] data, you know. We, I'm deeply involved with Giving Tuesday, and that's probably the deepest data dive that happens as it relates to giving in the world is what we do around Giving Tuesday, and Andrew, I know you've been part of that. But I think that in a lot of the work that I do with both communities across the country and then with larger individual nonprofits, you know, it's just, it's striking how far behind the generosity economy is in the use of data, you know, relative to, you know, other sectors of the economy. And so we don't know our donors very well. We don't know, you know, we don't know their life cycle very well. You know, we don't understand why someone gives for three years in a row and goes away. You know, we don't know basic things that a retailer knows down to, you know, your last transaction for thirty-five cents, they're just in a really different place. And so I think that, but I also think that that's really difficult to assess on an individual platform unless you're one of the really enormous platforms, and there's only a couple of those. So what it would require is it would require the generosity platform, you know, community coming together to really sort of

share and analyze data and begin to allow for, you know, some big data analytics to happen around, you know, the donor economy and understanding much better how we capitalize on what we know is out there in terms of people's desire to be generous, but in a way that makes us smarter and more effective in the way that we steward and cultivate and share our stories and build support for our causes. [Andrew Means:] I can't, like, shout that enough, Jamie, so thank you. Like, I think we absolutely do need to find ways of securely, appropriately sharing some anonymous data so we can understand, like, what is working where, you know. If somebody gives to you environmental organizations, what are the other organizations they might be likely to give to you? I think if we could tap into some of that data, that there's a huge tremendous opportunity to actually increase the amount of giving and to provide more strategic insights back to organizations of all sizes about how they can best interact with their donors. So, thank you for saying it. I really appreciate it. Chic, it looked like you wanted to hop in with something as well. [Charles "Chic" Naumer:] Yeah, thanks. And so this is a great question. So the first thing I want to say is just be very clear that we've always made it very clear that the ownership of the data is our clients. And so our clients own the data. We don't own the data and we don't own the relationships to the nonprofits, the donors either. We aren't going to be marketing to nonprofits or donors. So I just want to be very, very clear on that fact. That being said, we would be very interested in participating in an effort where we come up with some standard specs around data so that that data could be shared. As long as our clients are comfortable sharing their data, we would be delighted to participate in coming up with solutions for doing that. It would also, as a vendor, be very interesting for us because it would give us very valuable data on how we can do what we're doing better, how, you know, back to the question you asked, you have data supporting, how the functionality that we built out is building momentum in the giving movement. We might have some real hard data to look at to support the development of those functionalities and features. [Andrew Means:] That's absolutely true, and so I'll put you on my list of people that I'm going to contact when I create this open data set of giving data. So I want to talk about a similar topic, and that's the role of transparency, and I understand the tension here. I and somebody who's founded for-profit companies serving the social sector and, you know, part of our technology is proprietary and there's things that we want to keep proprietary. But there's some things that can sometimes be important to be transparent. When it comes to your platforms and your technology, what are you choosing to share and what aren't you choosing to share? Is it, you know, is it important to be transparent about you are your third-party, you know, where do you house your data? Is it on AWS? What are the security protocols around that? What are the things that are important to share transparently, and what are the things that you guys feel are important to you to be more proprietary and that you view as proprietary information of your platforms? [Charlie Mulligan:] I could answer that real quick, Andrew. I think for us, transparency is super important, you know. Again, our entire perspective is that we help nonprofits build long-term relationships with their donors and that all comes with transparency.

I think that some, an area where sometimes nonprofits are behind the curve a little, I don't know that they're as open about certain things as they should be, so we need to lead the way. We're super transparent about our pricing, we try to make it very simple. But everything about our site should be available on our site, everything about our processes and other things. And we actually try, we lead with that, you know. So for example, when people are making a gift, we, you know, we show that we're a for-profit company, this is how we make money, we charge this percentage, here's why. And I think that's why, and then we say, if you'd like to cover this fee for nonprofits, we see about seventy-five percent of people cover that fee. And we know before we added some of that wording around, you know, that we're a for-profit company, that number was much lower. So you actually get rewarded for just being open about what it is you're doing. So, you know, I'm a firm believer in that. I don't think it's a, you know, something to, it's not a disadvantage. The more transparent you are, the better it is for everybody. [Andrew Means:] Absolutely. Lori, did you want to jump in on that as well? [Lori Finch:] Sure. I would say, I just wanted to say that, first of all, I really appreciate the desire for transparency and, you know, who you're working with, how your technology is architected, I think, those are the types of questions that clients or potential clients or people who are looking at Giving Day platforms should be asking. As I know, just from our experience, you know, we just released this report, and part of what we've found was that one of our partners, you know, there was, you know, we weren't, the database wasn't configured correctly and I know we were getting a lot of questions. And in that case, you know, there are times where we might choose to not be as open as who that is and many of our clients are larger clients who we've been through, infrastructure reviews know who the players are. But we also think that no matter what, we have to own what it is and so, and who, you know, own the fall for things that, you know, are our relationships that we're bringing to bare on our clients. But certainly, I think that transparency is key in terms of infrastructure and kind of understanding that, and that's something that, you know, when we work with our clients, we spend a lot of time talking to them about. [Charles "Chic" Naumer:] Andrew, could I add a couple comments to this topic. I think in agreement with Charlie, you know, transparency for the users is really important, and I think that goes to that theme of trust, building trust in the community, building trust to donors and nonprofits. And then on the technology side, in terms of transparency, one of the techniques that we've used is we bring in outside auditors every year to audit our systems. And these are highly technical people that can look at our infrastructure, can look at our code base, that can look our internal practices at CiviCore and give us really strong feedback. And, you know, that kind of falls into that category of, you know, it is something that we, you need to have the discipline to do. It takes time and it takes money to do that but it is important. And so that's one of the ways that we try to be transparent is by having these third-party audits where they come in and really, technical people, really take a hard look at what we're doing. [Andrew Means:] Absolutely. For those of you on the call here, if you have questions, feel free to be chatting those in. We're getting a few of them

and trying to filter them in here. But as we have a few more questions, I'd love any of your thoughts on kind of where are we going with online giving, with, you know, Giving Days. And in particular, one of the people on the line, Brandy, was asking about this idea of donor fatigue, Giving Day fatigue, you know. Are there things that, you know, if technology providers or as people that are just, you know, steeped in the space, what are your thoughts on how technology and innovation can help address things like donor fatigue and increase the number of dollars available to organizations and increase giving? [Jamie McDonald:] I'll chime in on that, Andrew. So, you know, I think that nonprofits are sort of by their nature kind of conservative, and I think that they can come from a mindset of scarcity rather than abundance. And so part of this whole sort of question around donor fatigue I find for a lot of nonprofits and communities is, you know, is tied to this notion that there's this kind of fixed pool of dollars out there and that everybody is sort of fighting for those dollars instead of recognizing, I think, that, you know, what we see is that there are not only, you know, there's been some growth in just giving overall in the US on an absolute basis and on a percentage basis. We'd like to see it growing more from, you know, a percentage perspective, but we are seeing some growth in giving. But part of it also is that we're in this huge shift and it really relates to everything we've been talking about today where the next generation of givers needs to start being approached, asked and, you know, invited to be generous in new ways. And so I think part of taking this next step, you know, as, again, in this sort of generosity economy broadly, is recognizing that we're at a place right now, you know, I think a pretty significant inflection point when, you know, you think about the sort of thirty-five and under giver. They are, they would just would never consider, like a whole sort of direct-mail [inaudible], send a check, you know. That is literally a dinosaur already to that age group. That's not, like, for some nonprofits, they still live in that world, many nonprofits, and we so jump the shark on that. You know, we've really kind of reached this new place, but so many nonprofits haven't caught up with it. So when they think about this concept of donor fatigue, it's really because they're coming from a very traditional place, you know. Whereas when you think about the reality of, you know, digital life today, the more you ask, the more people act. And so giving is very much the same way. In Giving Tuesday, we see that in [inaudible]. So platform after platform has evaluated the impact of giving on overall December, and I know it wasn't for a study you did Andrew this time around. But we know it from a number of the other platforms that we work actively with, which we're fortunate, is, you know, seventy some platforms around the country who are so amazing and share their data with us for Giving Tuesday. But, you know, what we see is that December overall for nonprofits that participate in Giving Tuesday, is up on some platforms network is five times greater than nonprofits that don't, not because they're doing something that's so outstanding on Giving Tuesday or year-end, but because they're the kind of nonprofits that get it. So they're asking twice, they're thinking in those ways, they're creating that sense of an event. And so I think that we're really at a point where we'll start to see that shift away from this perception of donor fatigue and start to see ourselves

as people who are inviting people who want to make a difference to engage with us. And people want to make a difference more, so if you invite them more, they'll want to matter more and you've just got to be creative about how you ask and what you ask them to do on your behalf. [Andrew Means:] Absolutely. There's so much in there that's so great. I think this question of, especially how do we engage with younger donors is really important. I mean, even one of the things we saw, and the data was imperfect, so you've got to investigate this further, but with Giving Tuesday, I mean, even on Giving Tuesday which is huge online focused Giving Day, a huge number of the donors were over fifty-five. So it's, you know, we're not tapping in, I think, to younger donors, like, no one's ever sent me a direct mail piece, nor would I ever respond to one. Like, we have to find new methods of engaging with younger donors. Lori, I think you wanted to jump in on this as well. [Lori Finch:] Yeah I just wanted to say, Jamie, I totally appreciate and also hear often this donor fatigue thing. And when I think about pie and people think it's, you know, defined, I mean, we're seeing so much growth where you see new donors on these giving days. I hear a lot on the donor fatigue side with an overabundance of messages, especially with these giving days, whether it be Giving Tuesday or a community giving one. And so donors have fatigue because they're getting messages from all these different sources, and I see that as an opportunity to better educate nonprofits on how to be more strategic in who they're reaching out to and segmenting their audiences, not necessarily by age because we do see people who give across all the different ages, but just being more strategic in their campaigns. And hopefully that's going to lead a little bit to, I mean, like will start changing the tide. And, Andrew, I also don't give anything unless it's online. So someone came to my door the other day and I was like, no thanks, send me an email. And so I think more and more, again, we're going to have to start switching how our mindset and start thinking about, again, hiding larger, and it's growing, versus stealing pie from one or another. [Andrew Means:] Absolutely. Go ahead. [Charlie Mulligan:] I'm sorry, I know we've touched on this a lot. But one of the things we tell nonprofits a lot is that it really is kind of like a bell curve. And so, they'll, you know, if they send out a request to a thousand different people, a couple of people immediately are going to complain that you reached out to them too much. But you haven't even gotten to the center of the bell curve and so, I haven't seen nonprofits reach out too much. They almost always reach out too low. That's usually the main problem they have. And what we've seen over and over is that people that donate more often are more likely to donate more often, and nonprofits that run more fundraising campaigns do better each time. So the data says the opposite of donor fatigue. They say nonprofits, you know, it says essentially nonprofits need to reach out to people more. And so what we always say to nonprofits really is that, you're not, you're looking at it from your perspective where you're trying to satisfy a need and you need the money and you're asking people and you think they're [inaudible]. But people want to be happier, and one of the things that increases their happiness is donating to nonprofits, and you're helping them. And I don't know anyone who donates money and gets buyer's remorse by doing that. So that's one thing we

remind nonprofits, is you're providing them the opportunity to donate, and it's something that makes them feel great. And so when you change your paradigm a little bit on that, I think nonprofits are a little more likely to reach out to donors. [Andrew Means:] To that question, and Lisa chimed in with a question that kind of prompted this, is this idea of, you know, I think sometimes we tend to think of using technology and fundraising in general. We ask a lot of times for money, but we don't maybe follow up and say hey, here's what we did or here's how we can connect with you further. So what are some of the ways that you guys see technology, either on or off your platforms, being used to, you know, thank donors, keep them engaged in your cause, your organization, move them up kind of the chain, and getting them to give more and more regularly. Like how are you seeing that whole process utilizing technology? [Charles "Chic" Naumer:] So Andrew, one comment I have about this is, one of the things that we like to promote is that habit of giving. And so I think that that's one of the things that we really love about a 365 day a year platform as donors continue to use it throughout the year. And many, many donors schedule recurring donations and so they set up a system where they give every single month. And so this, it even goes back to that notion of fatigue, I think what we see happening with many gives days is it's creating a culture of giving and promoting recurring giving. So it just becomes a part of your practice. And that's something that we see that's very, very exciting, and I think that communication is a big piece of that. And so in our system we've built in a lot of tools for nonprofits to communicate with their donors. So, you know, things like being able to log in to the system and print out letters that itemize your giving for IRS tax filing purposes, that type of thing. [Jamie McDonald:] I think that there's also a growing understanding that, you know, the gift is the beginning of the relationship with the donor and not the end. And I think that that's a shift in perspective also for a lot of nonprofits and what technology enables is, it enables you to really automate, at a minimum, the prompting of continued, you know, stewarding of donors and, you know, and in some cases if it's a more sophisticated system, can actually automate the actual fulfillment in essence of the stewardship through continued communications and updates on the impact of giving. I think that the other thing that we see that's exciting is that a growing number of nonprofits are seeing the work that they can do around engaging people in activism and in digital, in kind support. So things like Amazon wish lists and that sort of thing, so that for a nonprofit that's trying to give its supporters some new ways to stay connected to their mission, they can actually invite them to be activists on behalf of their cause through, you know, petitions and other kinds of outreach. And we're seeing a lot of growth in this sort of, again, digital in kind, which is opportunities for a nonprofit to go to people who might not wish to give money, but might follow-up with a second or third interaction with that nonprofit by providing, you know, mittens to homeless children on the street through an Amazon wish list. And so, we're seeing, you know, the smarter nonprofits create those touch points where at least once a month they're using technology to either execute or prompt them to connect with a supporter and continue to reinforce their connection to the organization.

[Andrew Means:] Absolutely. I think there's actually a lot of opportunity to find ways of using technology to keep people more engaged, to let them, and let them get involved in multiple ways. I think, Jamie, you're right on. I mean, not everyone's going to write a check for, you know, have their credit card, pay for a 50 donation dollar, you know. They might want to go on and buy socks or they might want to do something more tangible. And so utilizing technology in a way that facilitates that I think is really important. So, we only have a couple of minutes left. And I want to close with one kind of final question, which is, from your perspective as providers, what can nonprofits community foundations do on their end to ensure that they have a successful Giving Day and a good relationship with their technology providers? What is it that, from your end, from your perspective, can your nonprofit partners do to get the most out of this relationship? [Charles "Chic" Naumer:] So I can start. You know, I think we feel communication is really, really important. And so when we prepare for a gives day, we have a process that we go through. We have regular check-ins. We communicate what we're doing, the processes, the steps we're doing to prepare for the gives day. We do regular reviews of the technology so that we're clear on how the technology is working. And then we go through, you know, contingency planning for what it looks like on the day. Ninety-nine percent everything works well, but in those cases that it doesn't work well, we need a good communication plan and we go over that process as well. So, you know, I think that communication is a really critical piece. So make sure that you communicate very clearly and often with the providers. [Lori Finch:] I would add that, go ahead, Charlie. [Charlie Mulligan:] Go ahead. [Lori Finch:] Oh, I was going to say, I think, you know, honesty is like a key thing, so having an honest, being able to have open and honest conversations. One of the things that we focus on is having multiple layers of contacts. So we have multiple people on our organization who work on, who work with clients and provide, whether it be strategy or account management or project management support, really having multiple people that you can utilize and be very clear on how, you know, to escalate issues. We ask, you know, our clients to, I mean, to hold us to a high standard and we will continue to ask that, and we'll hold ourselves to an even higher standard. But we really believe that, you know, that it's built on trust and they have to trust both the people and then the technology. [Charlie Mulligan:] Yeah, I think I, it really is about the relationship. So one of the things that I would encourage you to do is try to meet with us in person if you can ahead of time. What I try to do is get as many of our team members. It really is a long-term relationship. You're going to spend, for a giving day, you spend a lot of time, weekly check-ins for four to six months, but a lot more interactions being on that. And so you've got to make sure it's a right fit and other things. But the one other thing I would add is that, I think from our perspective, I would love for every single community foundation to pick GiveGab. I mean, of course I would love that. But I think from your perspective, I think it's great that there are multiple great players in the space, and that if you can spread out who you actually work with, I think the people that are going to make us the best are Kimbia and CiviCorps, that's why GiveGab keeps getting better

and better. And I think you guys have an advantage now where there are more players in the space and we're all getting better and better. And so if you can keep that ecosystem going, it's better for you in the long run. So that's what I would add. [Andrew Means:] Jamie, I think you might be muted there still. [Jamie McDonald:] Yep, sorry. Trying to follow directions. So I'd echo what's been said, but also add that I also think it's just really important for nonprofits to recognize that they own the responsibility ultimately. And that, yes, it's a relationship, and yes, you want to have, you know, transparency. But at the end of the day, GiveGab or CiviCorps, Kimbia can walk away and you're still going to be the one whose donor is upset. And so, you know, it's really important for nonprofits to recognize that, you know, at the heart of their relationship is really the relationship with their donor. The technology is a tool and there are a lot of good players in the space. But there's also, you know, there's really, the planning, the preparation, sort of being sure that you're prepared on the positive side to maximize your use of the technology for good in the long run as we've discussed, but also to be prepared for, you know, a possible problem, you know, just sort of sits with the nonprofit. And I'd look at providers carefully and their track records and their, you know, not whether they've had an issue because probably all providers have, but how they responded to it. And, again, I'd think through, and perhaps some of us on this call can add to this conversation outside of this. But, you know, what is that list of twenty questions that every nonprofit should think about asking a provider before they choose them so that they're in the best position to maximize the impact of their use of technology and be prepared in the, you know, in the possibility that something goes wrong. But always recognizing that at the end of the day, the pivotal point in the relationship is their relationship with the donor, and the technology just happens to be sort of sitting in the middle of that. [Andrew Means:] Absolutely. Well, we've hit our hour. Thank you so much Jamie, Charlie, Lori, Chic for being here. This has been great. I appreciate the transparency you brought to the conversation and everything that all of you are working to do to provide great technology to nonprofits. So, thank you and enjoy the rest of your day everyone [group response].