

>> Andrew Means: Welcome and thank you for joining us for today's virtual roundtable, Beyond the Dollars, Giving Days and Digital Data. Markets for Good is thrilled to be partnering with the Knight Foundation in presenting today's discussion which is the latest installment in our Giving Day lesson series. Today we're going to dig into some exciting data from Knight's new report, Beyond the Dollars, the Long-Term Value of Giving Days for Community Foundation, which was released on August 10. In Beyond the Dollars report, the product of Knight Foundation's three-year Giving Day initiative. This was a really exciting project in Knight worked with a number of community foundations across the country to experiment with new Giving Day ideas, provide research and learning opportunities, and develop tools and the practices for making the most of these big fundraising events. We'll learn more about this initiative in today's chat, but be sure to check out GivingDayPlaybook.org for the full Beyond the Dollars report along with some fantastic resources that Knight has put together for you to use in planning and running Giving Day. And of course be sure to check out MarketsforGood.org for previous installments in our Give Day lesson series as well as a ton of other posts and resources for supporting data use and digital infrastructure in the social sector. Before we get into today's discussion, just a few housekeeping details. For all of the audience members on today's call, your mics are going to be muted for the length of the discussion but we want to hear your thoughts and your questions. So please use the chat function in the bottom corner of the screen, the right-hand corner of the screen usually, and chime in and submit any questions that you might have for the panel. I'm going to try to cover as many of these as we can in the Q and A discussion at the end of today's conversation. We probably won't be able to get to everyone's questions, but stay tuned to both Markets for Good and Giving Day Playbook for more great information on the topic. Finally, we'll be recording and sharing out this conversation on Markets for Good, Giving Day Playbook, and the brand new Markets for Good podcast. We'll also be live tweeting the chat, and we encourage you to use the hashtag Giving Days and Give Day lessons to share your own takeaways. From today's discussion, I'm really excited to introduce our panel. Starting with, my name is Andrew Means. I am the head of the Uptake Foundation. We work with nonprofits and organizations around the world to use data and creative, new [inaudible] ways. I'm also the cofounder of the Impact Lab, which developed data tool for social sector organization. And joining me is Lilly Weinberg, Program Director for Community Foundations at Knight Foundation; Mike Berkowitz, cofounder and principal at Third Plateau Social Impact Strategies; Victoria Fear, Program Officer at the Miami Foundation; and Jeannie Howell, Community Impact Officer at Sacramento Regional Community Foundation. Thank you all for joining us today. Today's discussion is really exciting because we're going to be looking at Giving Days not just as vehicle for fundraising, as we've talked about in some of our previous round tables, but a valuable opportunity to use digital data and infrastructure in ways that can have a huge impact on community foundations, nonprofits, and their communities at large. Lilly, I'd love to start with you today. Before we get into the details of the new report, can you tell us

more about Knight Foundation's Giving Day initiative in general and how the Beyond Dollars report came about.

>> Lilly Weinberg: Yeah, sure, and thank you so much, Andrew, for that great introduction. I'm so happy for everyone who joined this webinar. So Giving Days started in 2012 with Knight Foundation, and we started with experimentations. We did a bunch of pilots, and then we launched the initiative the following year where we partnered with 18 community foundations across the country, invested 2.7 million dollars in these community foundations, and we had three specific goals. And so those goals were to grow and democratize philanthropy, to raise visibility and credibility for community foundations, and the last goal was to increase the capacity of community foundations to fundraise online. We sought to be able to measure that and not only measuring the money that was raised but also the actual impact of this work. And so Beyond the Dollars looks at just that. It looks at did we meet our objectives and how did the Giving Days do for this large investment that we made, and what was the impact. I would say that the bottom line is that if foundations set goals and align this work to their long-term mission, they really can have tremendous impact not only for their community foundation but for the community itself.

>> Andrew Means: Absolutely. That's actually, that [inaudible] concept of setting goals and being kind of strategic in how you go about achieving is a theme that's come up in many of our conversations previously. That's spot on with what we've been talking about. Mike, so your firm, Third Plateau, actually did the research and developed the Beyond Dollars report, in broad strokes, what did you find in looking at the impact of Giving Days on foundations, nonprofits, and communities that they serve?

>> Mike Berkowitz: Yeah, absolutely. So, you know, one of the really exciting things is that most Giving Day analyses since Giving Day started have really focused on the impact on nonprofits and on the fundraising metrics and as Lilly said Knight really wanted to understand how these campaigns affect community foundation visibility, credibility, use of digital technology and online fundraising, and that was a really sort of unique thing to be analyzing in the context of Giving Days. In brief, we found that Giving Days can have really significant benefits for community foundations. They really transform community foundation positioning within the broader communities. They put community foundations as a hub of information and at the center of the community in a much more public way than I think the rest of their work sort of allows for. You know, Giving Days, give community foundations unprecedented reach. You know, they really do become hubs of information, you know, through these campaigns, and by virtue of them being online campaigns, they force community foundations to get more comfortable with digital technology, which is becoming an increasingly fundamental need for organizations. And the benefits for communities are really an extension of these benefits, a major opportunity for generating community unity for organizational capacity building. I would note two other things, you know, one is that we saw over the course of the initiative a shift away from

community foundations focusing on the benefits of structuring the Giving Days to just raise as much money as possible from that to figuring out how to make them more sustainable and to have them actually provide some benefit to the community foundations themselves. And I want to be clear, you know, we're going to talk a lot about the benefits that Giving Day provide, but they're not viable for everyone, and that was something that we also saw. They are a lot of work, and really, I think, you know, to Lilly's point, I think it's the community foundations that have truly embraced them as a way to achieve their strategic goals that will really find a significant value in them over the long-term.

>> Andrew Means: Mike, do you, just a really quick followup, do you have a sense of the types of community foundations or the types of organization where Giving Days were really strategically aligned, and then maybe organizations where it's not the best use of their resources, it's not strategically aligned with them. Like what did, what did you learn around that?

>> Mike Berkowitz: I don't think that there's any characteristic that says this type of community foundation, you know, can really benefit and this type can't. I think it's a choice in the goal setting. And so as community foundations you know think about why did they run a Giving Day, what is it that they want to accomplish, how does the Giving Day connect to other programs, is it a one-off, you know, is it, is it something they were just sort of trying out and they seen it as, you know, potentially an interesting thing but maybe a one-off, or is it something that at least over time develops into a core program of the community foundations, and I think this is something that we've heard from both Miami and Sacramento, and we see that the Giving Day sort of moves from being something at the edge of their work to actually being something that can really feed into their mission, that is seen as a core program, and so that I think is the choice that community foundations simply have to make about how they want to embrace these campaigns.

>> Andrew Means: Absolutely. So Victoria, you at the Miami Foundation actually do host a pretty major regional Giving Day, Give Miami Day, and are one of the many community foundations that partners with Knight in this initiative. Can you give some background on Give Miami Day. Tell us about the impact it's had on your organization, the greater Miami region, and how it has become like a strategic priority for the foundation.

>> Victoria Fear: Absolutely. Thanks Andrew, and thanks to Lilly and everyone at the Knight Foundation. They've been a supportive of Give Miami Days since we began this initiative in 2012, and now we're moving into our fifth year. Give Miami Day this year will be held on November 17, and we're very excited. The event has continued to grow over time. Last year our most recent Give Miami Day we had over 17,000 donors supporting 604 nonprofit organizations, and collectively the community raised over \$7 million in just 24 hours. So it's been phenomenal to watch this event grow, and, you know, we're looking forward to what Give Miami Day holds for the future. We sent out an announcement this year that said save the date now and forever, so we've

kind of made a commitment that Give Miami Day will be around for the long term and that we are committed, and I think part of the reason behind that is because Miami is still a young city. You know, we've really only been around for a little over a hundred years, and other older cities have longer generations of philanthropy. They have had community foundations that have been around longer, and they've had time to develop that wealth over time. And Miami is still a young city, and we have a reputation for not being very civically engaged. A lot of this work was born out of the tale of two cities report from several years ago that kind of compared Minneapolis to Miami, and so we were kind of painted as apathetic about the place we call home. We didn't vote. We didn't volunteer. We didn't donate to nonprofits, so Give Miami Day kind of is part of the foundation's mission in that way in showing that this is a way that anyone can be a philanthropist, that anyone can support the cause that they care about and in that way have become very central to our work in creating that culture of giving in this community.

>> Andrew Means: Absolutely. One of the things that really jumped out to me about the report was just how engaged, how to [inaudible] engage many, many small donors. This isn't always about the big check. It's not always about, you know, the big, kind of corporate philanthropy kind of gift. It's really about activating an entire community to help itself and to support their neighbors in the places where they're engaged. So Jeannie, over at the Sacramento-

>> Mike Berkowitz: Mike.

>> Andrew Means: Oh, yeah, go ahead Mike.

>> Mike Berkowitz: Sorry Andrew. If I could just say one more thing on that, I mean I think the data really supports that, across the Giving Day initiative there was about \$116 million raised by these campaigns, and in every cycle but one, the median donation across these campaigns was \$50. And to think about \$116 million being able to be raised, you know, with \$50 as the median, I think really just underscores that point.

>> Andrew Means: Absolutely, absolutely. So Jeannie, the Sacramento Regional Community Foundation hosts a major Giving Day, the Big Day of Giving. Can you tell us some about the foundation's approach to hosting this giving day and how it changed over the years and what kind of impact you've seen it have both on the foundation and the community at large.

>> Jeannie Howell: Sure. And thanks again to you Andrew, and the Knight and Third Plateau for inviting us today. I think our approach is really along the lines of what Lilly was talking about in terms of the goals, you know, it's expanding philanthropy, you know, and it's raising the capacity of the nonprofits, and it's really looking at ways we can awaken personal philanthropy. One of the things that we always look at is data. So you started in 2013 with a very small 78 arts organizations. We kind of didn't know what we were doing, and we raised about a half million dollars. So we took those lessons and we parlayed them into a larger Giving Day starting in 2014, and this last year we had 570 nonprofits

raise over \$7 million. And I think it is that long, year-long approach where we're, we're really specific and strategic about the training that we provide to the nonprofits and looking at how we can improve year after year. So just going along the lines of Victoria, our date is also set for 2017. It'll be May 4th, moving onto a Thursday instead of a Tuesday, and we're really excited to see, you know, what this year's lessons are going to show us for 2017.

>> Andrew Means: Awesome. I want to turn the conversation a little bit to how Giving Days can be used as a resource for data digital infrastructure capacity building, but as I do that, just a reminder to everyone, if you have questions, feel free to chat them in and we'll start collecting those and trying to intersperse them into the conversation. Mike, let's begin with you. The Beyond the Dollars report presents pretty compelling evidence of the potential for Giving Days to advance the use of data and digital infrastructure, so what did you discover about how organizations are actually doing that, how they're using these events to grow their online presence, build better digital skills, collect, share, and use data, things like that.

>> Mike Berkowitz: Yeah, so, you know, as I said earlier, or I alluded to, for many community foundations the Giving Days really are their most significant foray into using digital technologies. It's one of the really interesting things I think about Giving Days. And, you know, we see the payout in a variety of different ways in terms of social media and just kind of general online visibility for instance, all of the campaigns grew the website traffic for community foundations as well as the Twitter followers, and I think the online nature of Giving Days means that, you know, the hosts are collecting, the community foundations are collecting just an incredible amount of data about their local nonprofits and donors, and that happens on the front end with nonprofits actually having to put in information about themselves into the, into the online portals and having that captured in one place. Obviously, to the information that's captured, both kind explicitly and implicitly when somebody makes a donation to an organization, and then on the back end of the campaigns through extensive use of nonprofit and donor surveys. I think the, you know, the opportunity is for community foundations to really be purposeful about figuring out in advance what data they specifically care about and want to track. There's a lot you can do with the data, you know, looking at fundraising trends in specific fields across different sectors, and we see some community foundations, I would actually say many community foundations, doing really robust data evaluations to help them figure out how to even better, you know, implement the campaigns next year or the following year, and there are a lot of great partnerships between community foundations and universities in their communities to do that data evaluation. You know, I think again there are opportunities to use the data even more purposefully, which we'll get into further in this conversation, but two quick examples in the context of Giving Days, so participating nonprofit organization receive reports about how they did in the campaign, but I think that there could be more done for instance to train nonprofits on how to utilize the data to increase the funds that they raise both through the Giving Day

but really throughout the year and how to better target donors. And then just looking at the donor information and of course we noted in the report that there are some, I think the greatest challenge that Giving Days had in terms of the things that Knight was looking at is the democratized philanthropy in one sense but not so much yet demographically, the demographics across these campaigns were skewed, heavily female, people over 40, English speakers, etc., and so I think there is some really interesting information, and there was a blog post at the Knight Foundation about how San Antonio has done this but to really look at the donor demographics and try to understand from that how to actually attract a more diverse demographically representative donor base. Those were just some of the opportunities, again some of which we see, you know, starting to happen, and I think there's a lot more to be done that again we'll get into further in this conversation.

>> Andrew Means: Absolutely. I also found it really interesting some of the information the report had about the demographics. We had done some analysis on just Giving Tuesday and looking at some of their data, and we found almost exactly the same kind of demographic trend, and maybe a slightly older audience than I think people oftentimes assume would rally around the digital Giving Day, and I think there's a lot of opportunities to grow the demographics of the type of people that are supporting these efforts. One of the things, Mike, that you alluded to was the use of platforms and technology, and we have a question from Theresa, what are the platforms that people are using for these? You know, they mentioned, are they all using [inaudible] or are there other platforms out there? Can you speak a little bit to that from what you found in your research.

>> Mike Berkowitz: Yeah, I mean, the main platforms that folks have used since the beginning of the Knight initiative are Razoo, Kimbia, CiviCore, and then actually a lot of community foundations in the Knight initiative contracted with companies to build their own platforms. Those are the main ones that we saw. You know, I think what we have noted over the course of the initiative is that the Giving Day technology and the companies that are implementing it, it's still a very young field, and I think, you know, a number of the companies, a number of the platforms, this is the nature, in some ways of digital technologies, but a number of the platforms have had pretty serious challenges at one point or another, to say the least, and you know, I think it remains to be seen kind of how this is going to play out in terms of which technologies may be the best or the leaders. I think the really exciting thing, and Sacramento has been a leader on this after the challenges of Give Local America this year, is that the community foundations are really starting to understand that they need to have a deeper, an even deeper understanding of the technologies and of the sort of tradeoffs. I think there was one level at which they were able to operate for a while in terms of evaluating the platforms, and now they've gone really deep, and I think it's Pittsburgh, somebody can correct me on this if I'm wrong, who really kind of came up with sort of a full kind of evaluation that folks can use in, you know, actually analyzing the platforms that might make sense for them. So it's a little bit of a silver lining there from the challenges this year, so the

community foundations have really been forced to go a level deeper in terms of understanding the technology.

>> Andrew Means: Absolutely. And for those of you interested in the Give Local America situation, in particular we actually had a whole round table on Giving Day technology that you can check out over at MarketsforGood.org. So Victoria, the Miami Foundation was actually highlighted in this report for its innovative use of the Giving Day data. Can you tell us about how the foundation is currently using the data that it gathers through Give Miami Day, and do you have tips that other community foundations can use about how to get these types of data projects in particular up and off the ground.

>> Victoria Fear: Absolutely. So, actually Mike and his team at Third Plateau has been really, really helpful to us over the past four years in developing the type of data that we want to look at, so they've been critical in helping us shape and develop our post-event surveys for both our nonprofits and our donors, so they helped us ask the right questions and gather the right information to know where to move and how to pivot to adjust to what our donors and nonprofits need for this to be a beneficial day for them as well. And speaking also to Mike's point about demographics, so after Give Miami Day last year, we looked at zip codes of where people were, where our donors were coming from, and we looked at the demographic data based on the post-event survey, and we too found that it was overwhelmingly women in their, white women in their 40s. So we said, okay, that is not reflective of who Miami is as a community, and this day is supposed to be about treating a culture of giving for residents here, so what are we going to do about that? So this year for the very first time our communications team is launching a much more strategic marketing and outreach strategy around Give Miami Day, so we're looking at two things. One is that demographic piece, how can we be more reflective of the community that we live in so that desired donor demographic and the other is around communities that have a higher giving potential, so communities that have greater wealth, that haven't been very actively engaged in giving through Give Miami Day. So, it's, you know, it's still in development, but what we're looking at is engaging elected officials, local media, advertising in those communities, and all of our resources really have been mostly in English so far, and Spanish and Creole are very prominent and important languages to translate in in Miami, so we're going to be more conscientious about engaging non-English speakers as well moving forward. But to your point about the data we're collecting, in advance of Give Miami Day, all of our participating nonprofits will tell you that we have a very lengthy registration form, and it can be a bit of a nuisance or them, but there's a reason. And the reason is that with that data we built a year-round platform. We work with Kimbia as well for both the Giving Day side and the year-round side, and that is a community resource that's open to everyone, but we're really beginning to use it as a place for our fund holders at the foundation as an introduction to who is out there in the community doing the work and perhaps introducing them to prospective organizations they want to support. So that's really—we're developing this pipeline of how to refer our fund holders

for organizations that they'd want to support year round, not just on the Giving Day.

>> Andrew Means: Absolutely. And Jeannie, Sacramento has done a great job and was highlighted in the report for the training that actually incorporates around the [inaudible] giving. And we actually have a question already coming in from a couple people around the use of training and how can community foundations support nonprofits that are engaged in these efforts. So can you talk to them about what you're doing at Sacramento and the Giving Day boot camp that you guys have.

>> Jeannie Howell: Yeah, so, and just to echo what Victoria was talking about, the amount of data that we get from the nonprofits is quite substantial. We have actually right now a separate profile database, and we ask some really extensive questions on programs, governance. We gather a lot of information, and we use that data to really help craft the training. We have a boot camp series. We do about three months prior to the Giving Day, and it's a month-long series of trainings that are around topics that are to help them with the Giving Day specifically but also really again speaking to capacity. You know, it's donor development, it's board engagement. We're really big on boards here in Sacramento. And collaboration. We included that this year. And then of course a lot of social media and marketing helped along the way. But we also, you know, we again, we look at the data year after year, and what's really great in terms of the impact of that training that we've seen is we looked at last numbers, and what it told us was that the organizations that went to all four of our boot camp trainings actually raised about 52 percent more than the average raised overall for nonprofits last year. And for those that didn't attend any boot camp trainings, they raised about 19 percent below the average. So it was nice to sort of give that information out. We do a report every year after the event, you know, to sort of glean all the findings from the surveys and the data, and that was a great point that we utilized there. And then finally, you know, we also look at previous year data to really target specific training for specific nonprofits. So we look at the results from the previous year. We separate our nonprofits into three different categories based on results, and then really tailor some webinar training to what they need to hear and what they need to do to be successful. So always sort of looking at the numbers to see how can we improve and how can we help the nonprofits and give them the training that is pertinent to them.

>> Victoria Fear: And if I could [inaudible].

>> Andrew Means: So Jeannie—oh go ahead Victoria.

>> Victoria Fear: Well, it's very impressive what they do because I'll tell you it's a lot of work to put together the whole, I mean Giving Days, anyone that's in the audience knows how much work it is to coordinate a Giving Day, but there's a great story that I want to share. So we host three different types of Giving Days. One of them, my favorite, is a peer learning panel where we have

organizations that were successful the year before come and share their stories and their lessons learned, and it's really the only peer-to-peer in-person learning opportunity that we have. And this story came out last year that a donor gave to a nonprofit on Give Miami Day, weren't that familiar with them, kind of heard about them, and so let me just give them a small gift. The organization was very, immediately thanked that donor and invited him out for a tour. So he went and visited and as soon as he was there he learned more, he was very impressed with what he saw from this organization and has become an annual donor to them since then. So that was really powerful to me to know that, hey this can be a great donor cultivation tool if nonprofits take advantage of the opportunity that's there to cultivate those relationships and capitalize on those prospects. So I very much agree that the training can make a huge difference in the outcomes of their campaigns.

>> Yeah.

>> Andrew Means: You raised a really good point though about the need to engage nonprofits and get them to actually put some resources behind this. We had a question come in from Ben, and he was saying, you know, in some research that he's been a part of, 75 percent of organizations spend less than \$200 on marketing materials and [inaudible] Giving Day less than 10 hours prepping for Giving Day [inaudible], how have you guys found ways to actually get nonprofits to maybe put behind the resources that can actually help increase the return on investment of participation in a given day?

>> Jeannie Howell: I'm trying to think. Well, I think, you know, I actually was sort of going onto something that Mike said about increased training on how to use the data, and I think that that's something that I'm going to take away from today, but I think providing them some more framework around how to utilize what they have already. A lot of nonprofits come to us and say this is really overwhelming. There's a lot we can do but we don't have the resources. I'll volunteer. I'm one person. And my advice to them always is that, you know, you need to create the campaign that works for your organization and utilize what we've provided for you, and there's a lot of tools out there that are for free, that you can really sort of dive into and help your campaign grow year after year.

>> Victoria Fear: There's a couple things I'd say to that. I definitely agree that nonprofits that come to a training and take advantage of the resources that we've already built for them, see that return on investment, and I do get feedback from some participant organizations that say maybe it's not worth it. It is a big time investment and we could be doing other things with our time, and I remind them, hey, if you plan a gala, a silent auction, a 5K, a golf tournament, anything like that, think about how many resources, financial resources as well, that your team is pouring into that and you have to, I mean you don't even get to keep all of the earnings from the event. You have to net it out from whatever you spent. So comparatively to other fundraising efforts, this is a fairly low list. It just has to be built into your year-round development

plan, and Jeannie actually doesn't know this yet, but I took a page out of her book and developed the planning workbook, and a part of it around board engagement and board development, because that's something we've seen work in favor for a lot of organizations and for the foundation as well because we fundraise for our bonus pool to be able to stretch the donations that nonprofits receive a little bit further, and we've used that as our board's opportunity to do their give or get for the year, and you know, our giving event is at the end of the year, so people are already thinking about the year-end campaigns, are thinking about those board contributions, so this is a way to capitalize on all of those things they're probably already doing in one way or another.

>> Andrew Means: So we're getting several questions. You guys have maybe brought on a little bit too much, right? So people want to know is the boot camp, are those resources available publically, and Victoria is the [inaudible] you worked on available publically if there are other community foundations and nonprofits on the line today that, how can they access into those resources that you all have developed?

>> Jeannie Howell: Well I'll just speak quickly about the boot camps and the work plan that we created is available on the Giving Day playbook, but all of our boot camps are recorded, sessions, thanks to one of our sponsors, and we provide those in the tool kit for the nonprofits, and they're free to the public, so you can go and check them out. They're on Youtube, and we record them every year so that you get fresh content.

>> Victoria Fear: Yes, same with us, so our trainings from last year are on our Youtube channel, and we'll be recording our trainings for this year. The workbook I mentioned, I'm still finalizing a few details in it, but it will be posted, so if you go on our website, GiveMiamiDay.org, click the nonprofit toolkit, that's really our one-stop shop for all of organizations, and I'll say hey, we have these in-person trainings. A lot of nonprofits will come back and say, oh, I can't make it, I can't go to that, and there'll always be a reason why it might not be able to work out, so that's why we do record them, and something new that we [inaudible] this year, which is actually taking a page out of the Knight Foundation, we started for us, for community foundations, a Facebook group that was a peer learning exchange for us to ask each other our questions as community foundations hosting these events. So this year we started a Facebook group for our nonprofits that participate called The Give Miami Day Nonprofit Learning Exchange, and honestly so far it's just been me posting things in there, but I hope over time I'll be able to kind of develop conversations and nonprofits will start to feel comfortable asking each other questions and seeing what works and what doesn't because Giving Days I think nonprofits can perceive them as a competition against each other, and oh, well they raise more dollars than me, and to the point made earlier, I mean, you have to develop a campaign that works for you. What are your goals and what's your capacity to meet those goals?

>> Mike Berkowitz: Now I would also just say that, you know, we have been

aggregating since the Giving Day initiative started. We've been aggregating the best tools at GivingDayPlaybook.org, so, you know, feel free to go look there for some of these resources, and if you have resources that you'd like to see on there, you know, please reach out. My email is mike@thirdplateau.com, because we are constantly refreshing that with new things as they come in.

>> Andrew Means: Awesome. It's great to see so many resources just being made, so probably available. I really believe that thanks to a lot of the work that you're doing at Knight, and you work with lots of community foundations partners all around the country, but where are some of the other things that you are seeing out there in terms of how community foundations are using Giving Day data with digital resources and are there some success stories that you want to share, and maybe even organizational factors that you've noticed that lead to really successful Giving Day initiative.

>> Lilly Weinberg: Sure, sure. So I love the samples that have just been made, and I would say that we're, we have two of really the most strategic community foundations for Give Days on this panel. So, you know, bravo to both of you all. So, Mike touched on this a bit, and it may sound simple, but what we found were these campaigns really were a pilot for community foundations to use social media, and that really transformed the way that they communicated their work. And so what we saw in the report was that during Give Days the websites were being used about nine times more frequently during the Give Days, so that's one piece and that Twitter was being used about 12 percent more the two days before and the two days after for Give Days. So what was really interesting finding from this was that this was actually transferrable to the community foundations and the way that they work and the way that they drive their programmatic work. So it's not, it's not just about the Give Days, but it was actually, you know, they were able to use this as a tool to be able to [inaudible] their community. And so there are many examples of this, but I would like to pull out the Duluth example, which, you know, through Give Days they learned how to use social media to ask for donations, but then they were able to transfer that to update potential donors on events, milestones, impact throughout the year. So, again, you know, much greater than I would say just the Giving Days. So, you know, I really think that the bottom line for this is that I saw, and I again, like you said, Andrew, I get to work with many community foundations. It's one of my favorite parts of the job, but what I saw was that with Give Days this pushed many of the community foundations kind of upped their game with respect to their digital presence around social media, and, you know, when you have nine times as many people going on your website, then you need to upgrade your website, and we saw that in many examples, and this also provided the opportunity to track data and really measure their own success. So that's what I would say is really what I saw with our network.

>> Andrew Means: Absolutely. One thing I want to start talking about is what are the potentials, right? What are the opportunities to see Giving Days continue to grow. Victoria and Jeannie, you both talked about efforts you've

done internally to build capacity and to use data in innovative ways. As you look forward to the future and to doing more Giving Days, how do you want to be using data and how do you think nonprofits can be using data to ensure that these initiatives are successful and that they're continuing to not only raise money but engage their communities and drive their issues forward.

>> Victoria Fear: Yeah, absolutely. Well, first to tack onto Lilly's point around developing your social media prowess, that's something that we've really worked hard on. We didn't have any social media presence until 2010, and like I mentioned at the beginning, Give Miami Days started in 2012, and we've really been driving traffic around our social media for Give Miami Day. That's where we see the biggest uptake of the year, and then we have to maintain that interest from the people that join and decide to follow us on that day and provide exciting content to them year round, and I think that goes back to our mission and why we're here serving this community is to create a more engaged and philanthropic and community-minded city. And so it all drives back to that point. And moving forward on Give Miami Day, I think building our year-round site, Nonprofit Central, has been critical to, like I said at the very beginning again, to developing that pipeline for our fund holders and even for prospects. So we had an anecdote from when we first launched Nonprofit Central, our year-round site, from Nike. Nike's corporate responsibility team went on Nonprofit Central. They stumbled around. They poked around and explored until they found an organization that they thought, hey, I think this would be a great fit for a partnership for us, and they followed up with that organization, and now they have an MOU, and they're a corporate sponsor of that organization. So that's been a really powerful story that's come out of it. I had a call recently from someone who was looking to organize a gigantic corporate volunteer service day, and so I said, hey, go on Nonprofit Central, see who you like, see who stands out to you, and I'll make that connection happen. So that's been a great tool in driving us, the foundation, as I believe Mike said earlier, as a hub of information for this community and creating, setting the foundation in this role as a central resource for Miami to learn about where to volunteer, where to donate, where to be referred for services that someone needs, if they need to make a random donation of furniture. Someone called me about a food truck, and I said, well go on Nonprofit Central and see who you like, and also it is definitely a donor cultivation tool. We allow folks that are planning major gifts on Give Miami Day to open a donor advised fund with us. We can accept gifts not only through credit cards but also through donor advised funds at the foundation on Give Miami Day, and those gifts are not assessed any fees. No credit card or transaction fees. So the nonprofit ends up receiving 100 percent of that gift. And last year I believe we had nine or ten new [inaudible] open as a result of that advertising, that opportunity for Give Miami Day. Now some people closed the fund afterwards, after the event because they may not be interested, but it allowed us to start that conversation with philanthropists in the community and hopefully they'll think of us when they decide to open a permanent donor advised fund. Of course we have had some remain open, which has been great, and developed

those year-round relationships with philanthropists in the community too.

>> Andrew Means: Absolutely. I'd be curious what you guys think are some of the barriers that other community foundations might be facing when it comes to us getting really valuable Giving Day initiatives. What are some of the challenges that you're seeing other organizations and community foundations face?

>> Jeannie Howell: Well—go ahead Lilly.

>> Lilly Weinberg: Okay, so I think that one of the major barriers that I'm seeing, Andrew, is first of all, you know, funders realizing that Give Days may not drive the long-term strategy and mission of the community foundations. So I don't even know if that's a barrier, right? I think that's a, you know, a level of awareness. And I think that that's fine, and Mike actually spoke about that at the beginning. We had seen that many community foundations are deciding, you know what, this was good. We learned from this, but this does not drive, this is not increasing our endowment. This is not increasing our strategic programmatic areas, and we're moving on. So, okay, so that's fine. I would say that another piece that I'd seen to be a barrier is that this takes some risk to do these campaigns, and we've seen that there were issues with the technology piece, and it made a lot of people uncomfortable. It made me uncomfortable, and this got, a lot community foundations [inaudible] their comfort zone. And I would say that that was a barrier for some of my community foundations of whether or not they wanted to continue this work and not, you know, I think that that really looks at our community foundations willing to look inside themselves, like private foundations do, and commit to an organizational shift of being able to experiment, of being able to, you know, being nimble and be able to take risks. And some are not okay with that, and others are. I would say that in the age that we live in, the digital age that we live in, I am, you know, I'm a strong believer, and you know, jumping into the risk side and being comfortable with taking a little bit more risk for this type of work.

>> Andrew Means: Jeannie, did you want to respond to that as well?

>> Jeannie Howell: Lilly said it great. I think those were, I was just going to add to that, but, you know, I've spent this week speaking to about three or four other community foundations that are interested in starting this work, and, you know, she really phrased it beautifully that the risk is the thing that really is the barrier and the learning curve. I think they come into it green, and they are afraid to take those chances, so learning from those that have gone before them I think is a huge step for them.

>> Victoria Fear: I was just going to say, to be really realistic, time and money are a barrier. I mean I'm the only person in the room right now but luckily I have an amazing team that we work hand and hand. I'm on the programs team, and then we have someone from development and from communications, and we have the support of our whole staff to make this happen. And luckily we're a relatively mid-sized to large organization. We have over 20 folks on staff here,

and that's maybe not a realistic thing for some smaller community foundations to do, and it does take a significant investment from us. We don't fundraise for ourselves. We don't take a fee. We don't charge a fee for nonprofits to participate, so you have to be willing to take that risk and put in that gigantic investment of time and financial resources to see if it's something that really works for your community.

>> Andrew Means: Absolutely. This idea of strategic alignment keeps coming up again and again, and we have received several questions potentially asking how have your foundations gone about determining whether this was aligned strategically, and then two, determining the scope and scale of the resources to dedicate towards executing your Giving Days, because these aren't, I mean small initiatives. These are potentially, you know, fairly large investments of time and energy and resources. So how have you guys, both in Sacramento and Miami, address those questions and determine that this is a good investment for you to make.

>> Jeannie Howell: Well, I'll just say that I think the scale and the resources is evolving. It evolves every year, I think, as we grow, that conversation continues, but for us, this has been a part of our strategic initiatives for the last couple of years. You know, back in 2010 we actually commissioned a research project called the Generosity Project with some other community partners, and it was really around setting individual giving in our region. We found out we were below the national average in like sized cities, and you know, our unofficial campaign slogan was let's just get to average, and, you know, we could raise 250 million more dollars. But it is within one of our strategic initiatives, so it is key to our mission in expanding philanthropy, and that really dictates how we allocate the resources to it in order to achieve those goals, outlines and the initiative.

>> Victoria Fear: And as Lilly knows, because we're just a few blocks apart here in Miami, it's a fairly small philanthropic community here, and we have hundreds and probably thousands of active nonprofits, and they're competing for limited resources, and they step on each other's toes, and it feels like a fight a lot of the times, for nonprofits that are competing for resources, and we even find that within our own grant programs. We fund very small percentage because we have project-based grants. So we said, okay, well how else can we grow our portfolio to be more inclusive of the amazing nonprofits that service community, and Give Miami Day has really helped fill that void that we didn't have before to invite everyone that serves this community to participate. The dollars are unrestricted, so these nonprofits can use them however they please, and it's also a great starting point and introductory point to become more involved with the foundation. So if they haven't applied for other programs in the past, they usually start to cultivate that relationship after the Give Day. We offer endowment funds, so we've had a lot of endowment funds open as a result of the experience they've had with Give Miami Day. So honestly we really see it helping to bolster and improve everything else we do, so luckily the Give Day

is growing alongside us as we grow and shape what our strategy is.

>> Andrew Means: Awesome. Before I go to just a couple questions, additional questions coming in, and thank you, we have tons of questions coming in, feel free to send more. We're going to get to as many as we can today, but check out both the Giving Day Playbook and Markets for Good over the coming weeks, and we'll try to get to some more. But Mike, we've been talking about data sharing and talking about digital infrastructure and how people are using these tools, are there potential downsides to the collecting, using, and sharing of this kind of data. Are there hidden costs, privacy, security concerns, other unintended consequences that we need to consider, that organizations need to consider as they think about giving days and the data sharing that often accompanies them.

>> Mike Berkowitz: Yeah, I'm not sure I'd call them downsides per se, but definitely there are some questions. You know, I think clearly security is a question, just in general if you're capturing people's information. You have to really, and we're seeing this in real time, you have to up your game in terms of security. And that both means understanding the donation platforms, you know, the information that they're capturing and the merchants providers are capturing, really understanding how is that information kept secure and then any information that comes to the community foundation itself, how is that kept secure. I think there were transparency questions, you know, to the extent that a community foundation might be using individual data as opposed to just of aggregated data to make decisions, whether that's, you know, looking at individual donors or individual nonprofits, I think to the extent that that might be used, I think community foundations, you know, need to actually sort of explain and explain in a really positive way why they're collecting some of the data that they are and how that helps drive forward the mission of the community foundations and really the community itself. And I think there needs to be a seriousness about data collection. And I think we see this a lot, you know, through these campaigns, and I think there's a way to sort of increase that seriousness and then, you know, looking at security and privacy concerns is one of those manifestations. You know, I think in terms of just some of the other kind of considerations here. You know, one is understanding that the data is partial. You know, this is, there's a tremendous amount of data within each of these Giving Days. It's not quite big data yet within any one community foundation or Giving Day, and so you have to understand as you're analyzing the data, and this is something we certainly have to be cognizant of in analyzing data across 49 campaigns over three years, you have to really understand, you know, where can you draw conclusions and where can you some draw some insights but understand that there may be only partial insights. I think there are going to be questions in the future around centralization when it comes to Giving Days. You know, certainly one of the reactions to give local America was, you know, do we need more kind of giving Tuesday models and fewer sort of centralized platforms. Centralized platforms, you know, make data collection much easier. It can be a little bit different if you decentralize. On the other hand, if you're using your Giving Day among other things for data collection purposes,

you know, for things beyond the Giving Day itself, there are certainly risks if, you know, if there's a technology failure, your data can be corrupted. And that's a really significant question. And then finally I would just say over time, you know, our theory is that we're going to see more community foundations really use the data. We're already seeing it sort of happen through the Giving Days where, you know, for instance, you know, Miami sort of analyzes the zip code data, and that tells them something about who's being served by the giving day, but it also tells them something about who might be served by their work or where some of the gaps are, you know, to focus on outside the Giving Day. I think we're going to see more of that. And that opens up questions about ownership of data. You know, is the community foundations sort of the owner of the data because they are kind of contracting with the donation platform provider and, you know, leading the nonprofit and donor surveys. You know, how is that data being used outside the walls of the community foundation. So there's some questions there. I think most of these questions may be sort of security aside, you know, are really kind of exciting challenges, but you know, there are certainly things that I think we'll see community foundations need to increasingly grapple with within the context of their Giving Days.

>> Andrew Means: Absolutely. I think that's something we've talked about in some of these previous round tables, and I certainly believe that we're just scratching the surface when it comes to the use of data across the nonprofit and social sector, and this is just one of those areas where if we could find ways of doing data sharing in secure and appropriate [inaudible] ways, there's [inaudible] a lot of questions and a lot of value, questions that can be answered and value that can be created. I've got a couple questions about how Giving Day initiatives can actually utilize other kind of civic actors, whether it be government, whether it be other, you know, nonprofits, or other funders, you know, the community at large, how are you all seeing Giving Day initiatives happen with some of those other kind of civic leaders to help make the day a success? Lilly, is that something that you've seen in any of the communities you're working in or Mike in any of the communities where you are doing the research for the project?

>> Mike Berkowitz: Yeah, I mean I'll say it's a really significant part of the Giving Days. You know, we see that happen in a variety of different manifestations. You know, I think both to really get the Giving Days on the community's radar and also over time to kind of reduce the burden on the community foundations alone. We see a lot of partnerships, you know, partnerships with the local United Way, partnerships with other community foundations, partnerships with corporations, with sports teams, which is something Miami has done, and you know, I think the way I've seen governments being used is not so much I would say, at least from what I've looked at in terms of kind of partnerships, but certainly doing events. You know, a lot of communities will get the major, you know, to do a press conference, you know, that morning encouraging everyone to give or to show up at events, so we certainly see a lot of that. It's a really significant part. I mean the way to overcome the resource and time and

financial intensity challenge, you know, that Victoria raised, is really to ensure that no Giving Day host is trying to do this all alone, and in fact just the nature of it is that you're never doing it alone, and, you know, understanding the role of partnerships is just totally central to the entire thing right down to the partnerships with participating nonprofits and how much work they do to really drive it.

>> Lilly Weinberg: Yeah, just to build upon that. I think that this is the real, one of the real questions that Knight's asking too, is that how can we take these digital campaigns and really think about true engagement with, you know, institutions, to the biggest players in the community then, and so and we have seen examples of that, and so I would, you know, I think, one, Miami Foundation is a great example of how you, you know, the [inaudible] you're engaging with people in real time and bringing all the nonprofits together, but I would say secondly I'm seeing that community foundations are thinking more about this as their next step for their Give Days, and so Center Foundation, and State College, is actually going to have a Give Day that's focusing around the engagement at the entrepreneurial community and the city, and so State College is a university town, but they have many startups around the community, and they see that as an opportunity to really engage, you know, those big players. I do think, Andrew, we talked about government, and that, and I don't have a lot of examples of that, and I really feel like we should be thinking more about that, right? Like we should be thinking about the decision makers in our communities and how we can use Giving Days in order to engage them more but also the information piece that the data that we get from Giving Days, you know, how can that also inform the decision makers in our cities. So I think it's a great point and an opportunity that I didn't really think about.

>> Andrew Means: Well, I wanted to say thank you to all of you for participating, to Knight Foundation for helping pull the discussion together today and making it possible. Be sure to check out GivingDayPlaybook.org for the full report and other awesome resources. Obviously you've heard about some on today's roundtable, and then also be sure to check out MarketsforGood.org for previous installments in this series as well as just a ton of great resources and articles about how organizations across the social sector are using data, thinking about digital data and data infrastructure and some of the just really great innovative thinking that's going on in this space. So, thank you all for joining me. Thank you, Lilly, Jeannie, Victoria, and Mike for joining me, and we'll be in touch and hopefully see you in upcoming roundtables. Thank you so much

>> Thanks Andrew.

>> Thanks.

>> Mike Berkowitz: Thanks everyone, bye, bye.

>> Lilly Weinberg: Thank you.

>> Thanks. Bye.

>> Thank you.