



FIA Data Week, May 2023

Smarter Fundraising with AI

Presented by Dave Lyndon



About me

- CTO/Cofounder of Dataro
- 10 yrs of software / database / ML engineering (I stopped counting after 10)
- Stoked to be working on state-of-the-art technology for awesome causes!



Agenda

AI Explainer

♥ AI for Fundraising: Theory & Practice

Case studies & What we've learned

The (near) future of AI & Fundraising



Artificial Intelligence



Computer systems that replicate or exceed aspects of human or animal intelligence



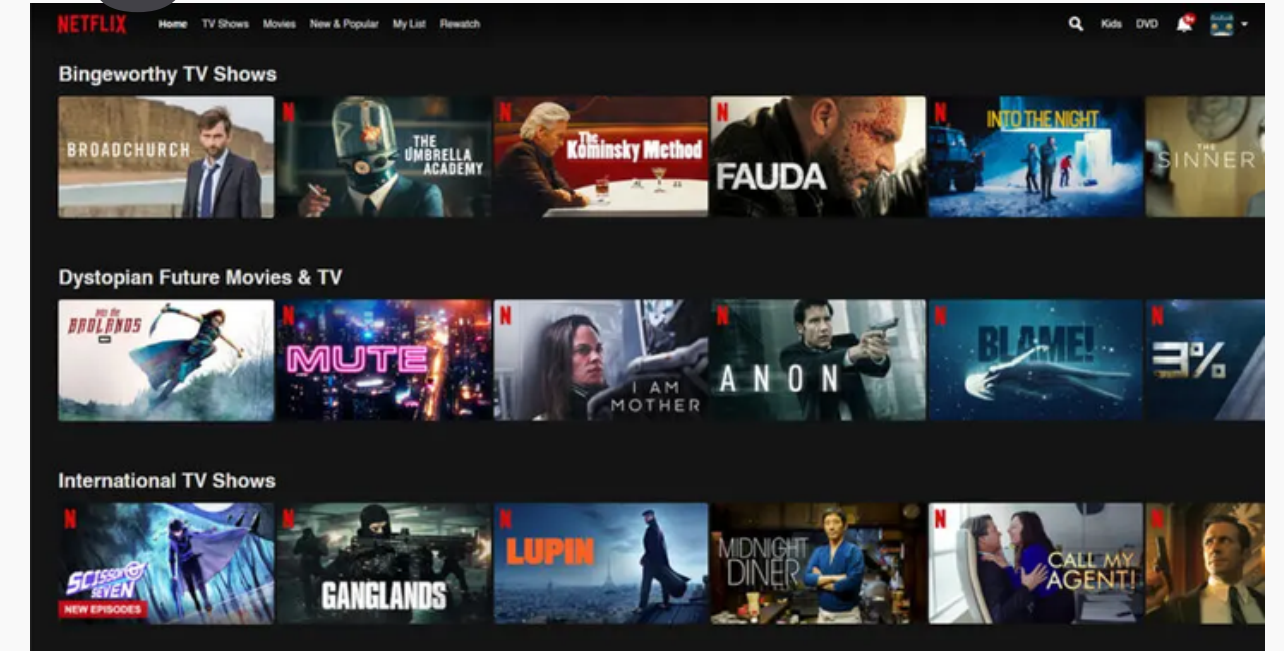
Aspects of Intelligence



Driverless Cars



Data Analysis



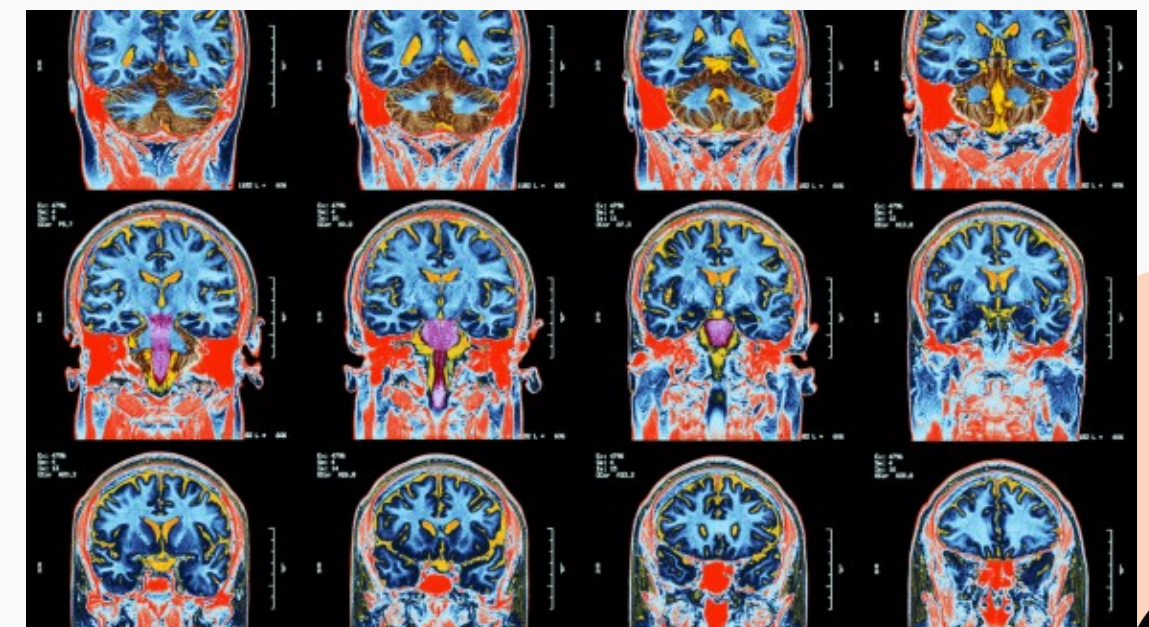
Content Recommendation



Spam Filters



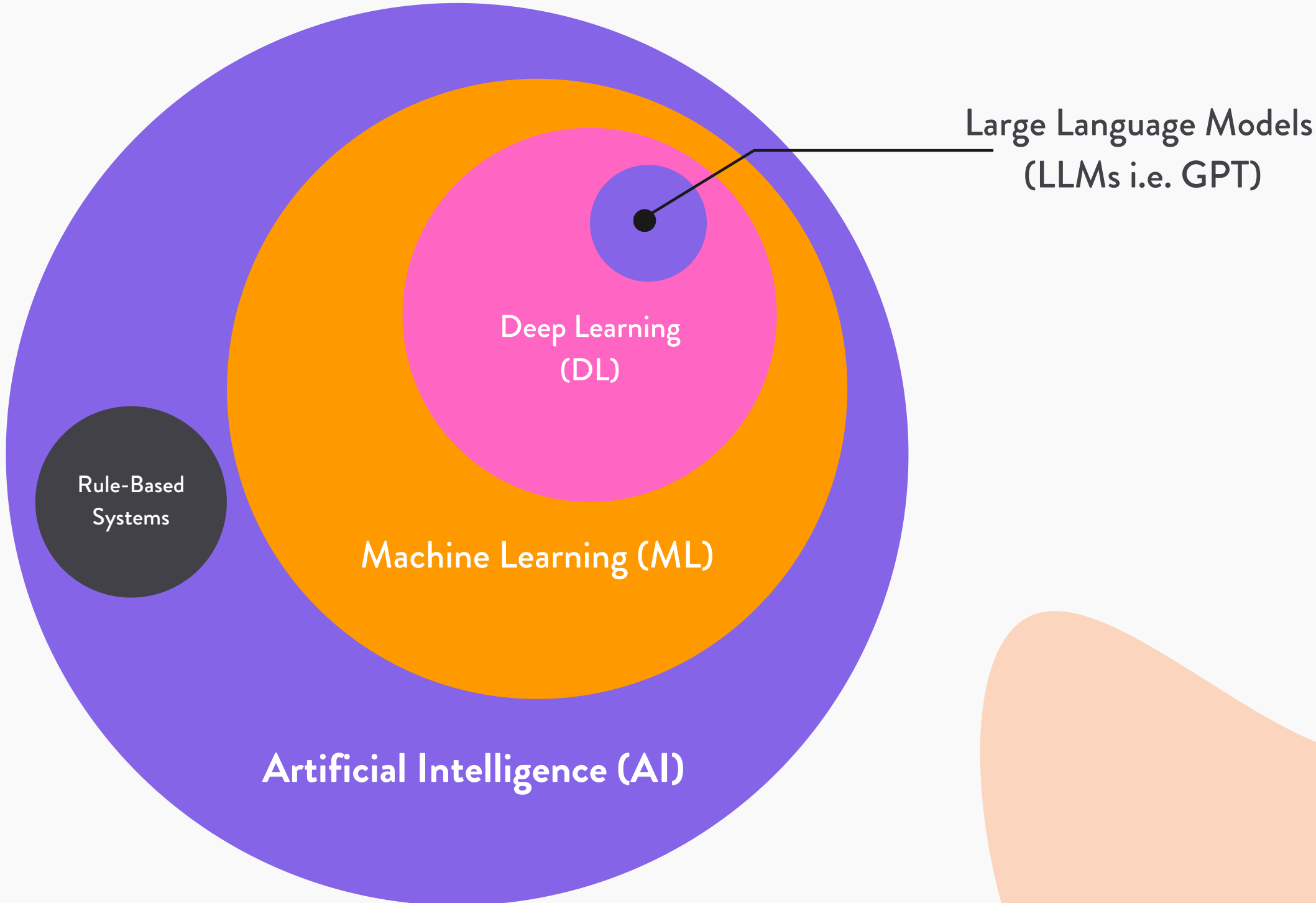
Manufacturing



Medical Image Analysis



Many kinds of AI



AI for Fundraising

Biggest win (right now)?

Run more efficient fundraising programs using AI-powered donor scoring!



Current fundraising programs treat the donor like a segment



Current fundraising programs treat the donor like a segment



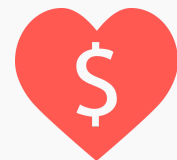
Gave a gift in past 3 months



Current fundraising programs treat the donor like a segment



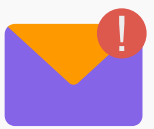
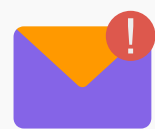
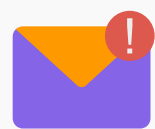
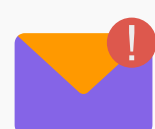
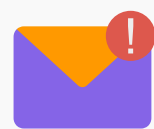
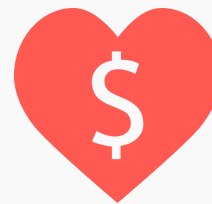
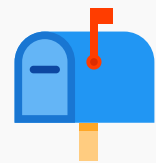
Let's treat them like individuals



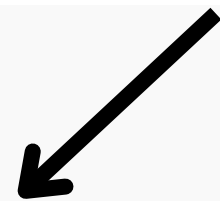
Conversion ask



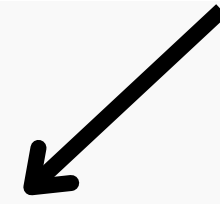
Let's treat them like individuals



Unlikely to convert



Most likely to convert



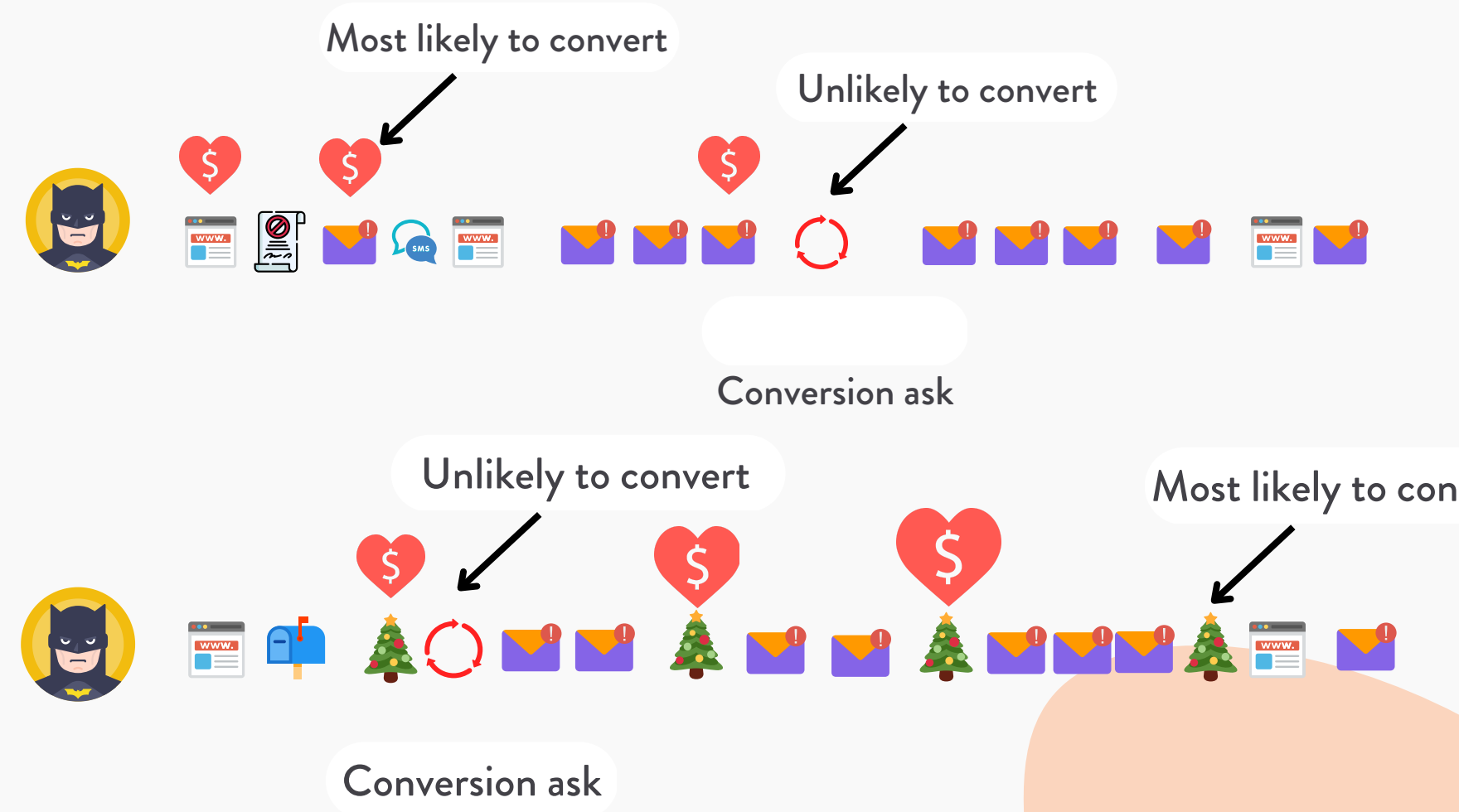
Conversion ask



from this...



to this



Why does AI lead to better fundraising outcomes?

**Most charities only use
3 data points in
selecting donors for
fundraising campaigns**

Fundraising Data

Last gift
Gift count
Gift value
All transactions history
All commitments
All communications
All actions
Age
Gender
Location
Payment method
Acquisition channel
Relationships
Education
Memberships
...

**AI can take into account
hundreds of data points
and rigorously evaluate
which factors are important
and how they relate**



How does *Machine Learning* work?

Let's say we want to predict who will convert to RG

1. Find all the times people have converted in the history of the database
2. Look at the patterns of events leading to each conversion
3. Generate hypotheses to match patterns to conversions
4. Keep only the patterns that prove to be predictive many times
5. Use these patterns or 'model' to predict future conversions



Fundraising AI (in practice)



Fundraising AI (in practice)



Likelihood to
become a recurring giver

99%



Likelihood to
give to an appeal

21%



Likelihood to
give via email

91%



Likelihood to
give a major gift

7%



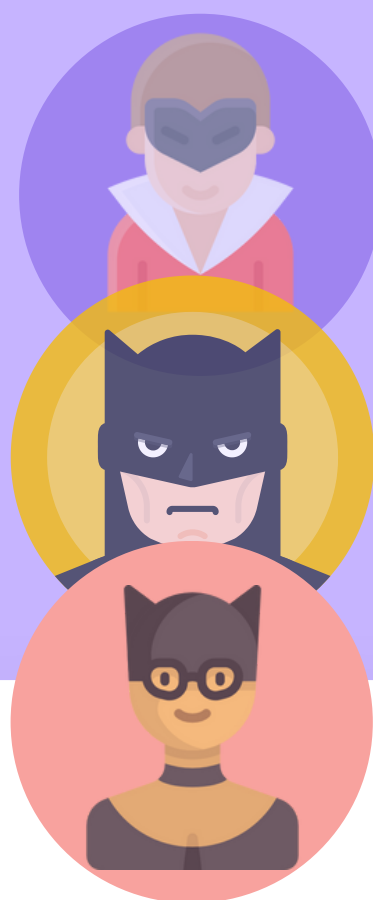
Fundraising AI (in practice)



Likelihood to become a recurring giver



Best monthly conversion prospects



Likelihood to churn/cancel



Donors most likely to cancel



Likelihood to reactivate



Best lapsed donor reactivation prospects



Likelihood to give a major gift



Best major donor prospects





We founded Dataro in November 2017

Original goal was to make state-of-the-art AI & ML accessible for NFPs

We have deployed our AI software to >130 organisations internationally

We've learned a lot along the way...





Building an *ML* model is only one part of the solution

**System and operational integration, training users,
experiments and reporting, reliability, etc,...**



Case Study Highlights

By using AI to find the best prospects, organisations can achieve results like:

- Receiving >\$1M additional gifts for an Appeals program over 12 months
- Decreasing RG Churn by 15%
- Identifying additional \$266k of mid-value donations in a single appeal
- Increasing recurring giving conversion response rate from 6% to 11%
- Increasing RG reactivation rates from 9.8% to 23.8%
- Increasing Major Gift revenue by 15%

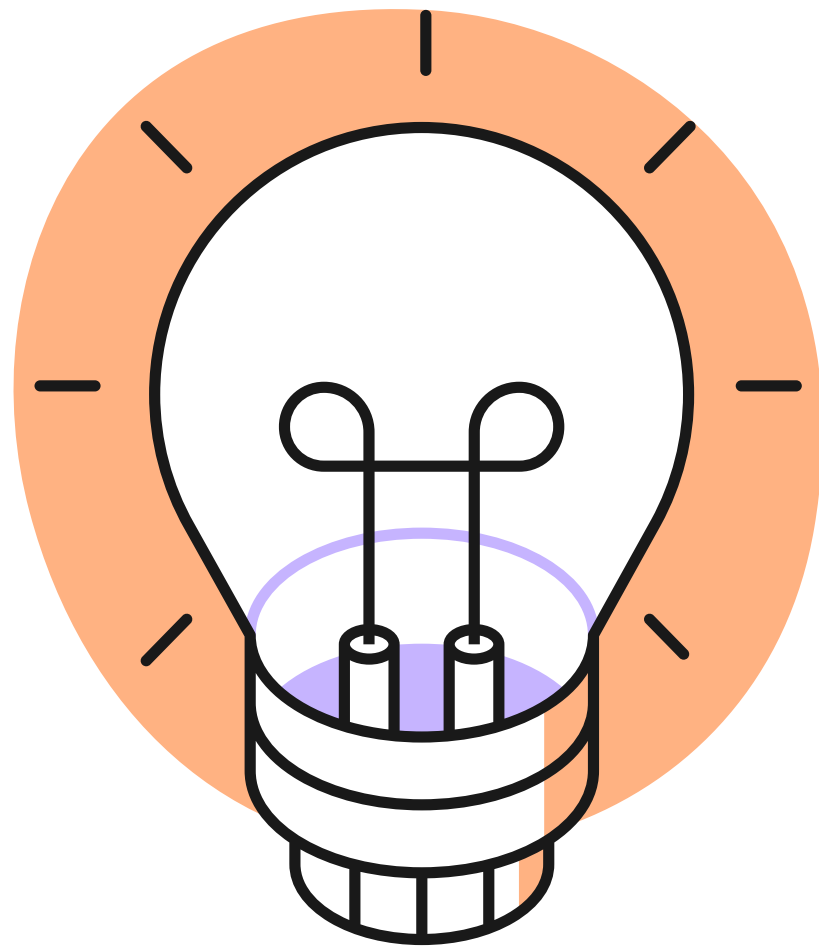
<https://dataro.io/case-studies/>



Beyond the numbers

I strongly believe that this technology is not just better for fundraisers, it is also a better experience for donors





FROM THE FRONT LINES OF A RETENTION CAMPAIGN

"I just spoke to [Amy] and she made a point of saying that we are the only charity who rang her throughout COVID and thanked her for her generosity and support. [Amy] donates to multiple charities who have all rung her and asked for more money. She said because of that, she has cancelled her support of other charities and continued to support [our charity]"



What can AI do for you?

Who
When
Why
How
What



What can AI do for you now?



Likelihood to
become a recurring giver



Who
When
Why
How
What

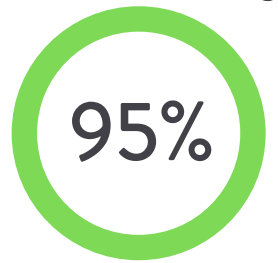
Bruce
Now!
Convert to monthly
Email
?



What can AI do for you tomorrow?



Likelihood to
become a recurring giver



Who
When
Why
How
What

Bruce
Now!
Convert to monthly
Email
?



The next generation of AI tools



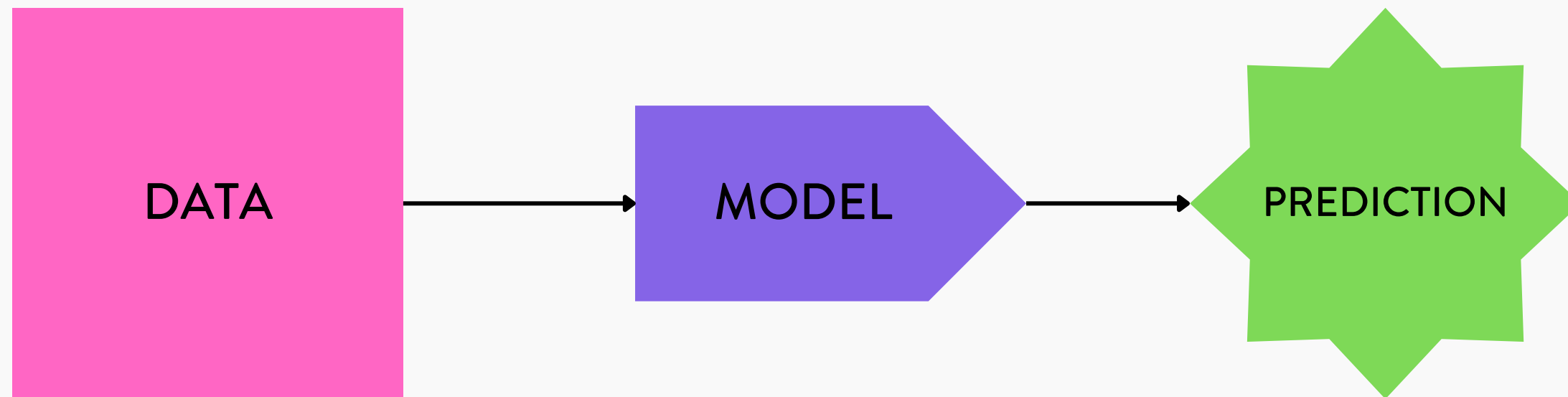
Generative Models

A chiaroscuro airbrush painting of turtle basketball players collecting charitable donations at Christmas

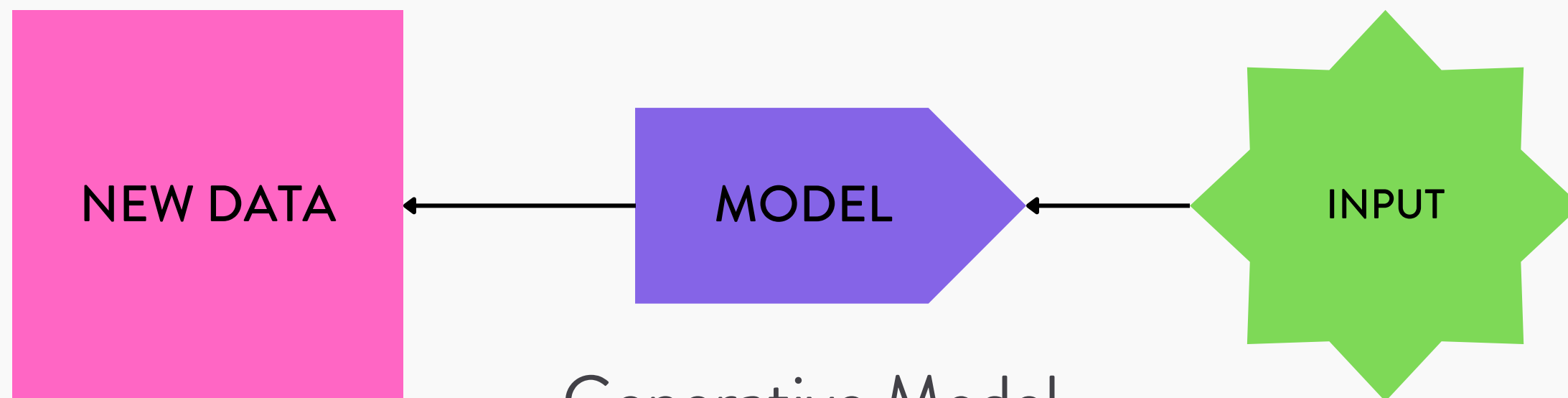
Generate



Predictive vs. Generative Models



Predictive Model



Generative Model



Generative Models



DA Hi ChatGPT, can you write me a really good fundraising email for The Australian Red Cross?

Certainly! Here's an example of a fundraising email for The Australian Red Cross:

Subject: Help support The Australian Red Cross - make a difference today

Dear [Name],

As you may know, The Australian Red Cross is a humanitarian organization that provides vital support to people in need across Australia and around the world. From disaster relief and emergency response to health services and community support, the Red Cross is there when people need it most.

However, none of this work is possible without the generous support of people like you. That's why I'm writing to you today to ask for your help.

We are facing an unprecedented challenge in the wake of the COVID-19 pandemic, and the Red Cross is on the front lines of this crisis. They are providing critical support to communities affected by the pandemic, including emergency relief, mental health support, and assistance to vulnerable groups like the elderly and those experiencing homelessness.

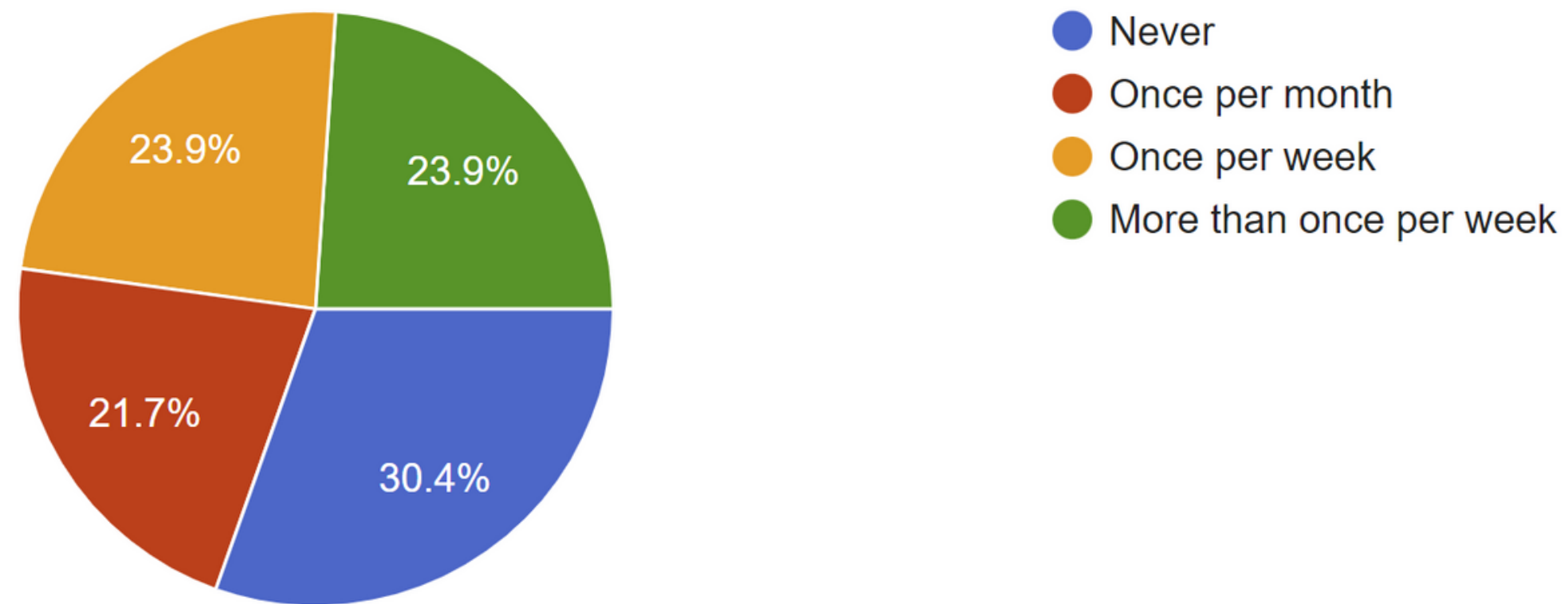
With your support, we can help the Red Cross continue to do this vital work. Every dollar you donate will go directly towards providing support to those who need it most. Your donation

GPT for NFPs

Roughly how often do you use GPT tools (eg Chat GPT, Bard, Bing AI) AT work?

 Copy

46 responses



Chat GPT

Incredibly easy to get something almost good.

Very tricky to get something really good!



Dataro AI Assist



DL

AI Assist

Create email subjects lines

Let Dataro AI Assist take the hard work out of writing high impact email subject lines that get your emails opened! Copy your existing email below and get 5 subject suggestions in seconds

Email content ⓘ

Dear Tim,

As you may have seen in the news, thousands of people are continuing to flee heavy fighting in Sudan. At least 20,000 people have fled to Chad, with many now sheltering under trees without food or water. Others are fleeing to South Sudan or Egypt.

I am particularly concerned about the situation in Sudan's Darfur region. Sites hosting internally displaced people have been burned to the ground. Homes and humanitarian premises have also come under fire.

People fleeing conflict in Sudan urgently need your help.

We have deployed emergency teams to Chad's eastern border to identify newly arrived refugees and assess their needs. We are also stocking up on relief items such as sleeping mats, soap and cooking utensils. In South Sudan, we are monitoring new arrivals and sending aid to border crossing points.

Generate



Suggest Email Subject Lines



Subject line 1



"Emergency in Sudan: Help Thousands Fleeing Conflict 🚨"

Subject line 2



🚨 Urgent: Sudanese refugees need your help now

Subject line 3



🚨 Urgent Appeal: Help Sudanese Refugees Fleeing Conflict 🚨

Subject line 4



🚨 Urgent! Help Sudan's Displaced Refugees Now 🙏

Subject line 5



📞 Urgent: Thousands Fleeing Conflict in Sudan Need Your Help Now



Rewrite all your touchpoints



Reminder Email



Dear Tim,

I wanted to follow up on our recent email regarding the ongoing crisis in Sudan. Since our last message, the situation has only worsened, with thousands more people fleeing violence and insecurity in the region.

As a valued supporter of the UN Refugee Agency, I want to thank you for your continued generosity and compassion towards those in need. Your support has made it possible for us to deploy emergency teams to Chad's border and provide critical relief items to those affected by the crisis. We are monitoring developments closely and doing everything we can to ensure that refugees receive the assistance they need to survive.

SMS



Thousands flee Sudan amid heavy fighting. People in need of urgent supplies and shelter. Support the UN Refugee Agency's work. Donate now. Reply Stop to opt out.

Facebook post



Attention! Urgent humanitarian assistance needed for thousands of people fleeing heavy fighting in Sudan. Many are without food or water, and are sheltering under trees. The situation in Darfur region is particularly critical, with internally displaced people's sites burned and humanitarian premises coming under fire. We have deployed emergency teams to Chad and South Sudan to provide assistance and relief items. The UN Refugee Agency urgently calls for a cessation of hostilities. Join us in providing life-saving aid by donating now. Thank you for supporting us in helping those affected by crisis.



Tailor to Segment



Target segment ⓘ

Older major donor

Generate

AI Assist Output #1



Original text: People fleeing conflict in Sudan urgently need your help.

Suggested change: Elderly refugees fleeing conflict in Sudan urgently need your help.

Reason for change: This change helps to personalise the content for the Older major donor segment, who may feel a greater sense of sympathy and connection with elderly refugees.

AI Assist Output #2



Original text: People fleeing conflict in Sudan urgently need your help.

Suggested change: Your support is urgently needed by those fleeing conflict in Sudan.

Reason for change: Older major donors are more likely to respond positively to language that emphasizes the impact that their support will have on those in need. This change shifts the focus to the donor's role in providing necessary aid.



Create Quality Appeals



Organization name ⓘ

UNHCR

Organization cause ⓘ

Australia for UNHCR unites caring Australians – individuals, community groups and businesses – to support people fleeing conflict, disaster an

Key statistic highlighting challenge to tackle ⓘ

With an unprecedented 100 million people now displaced worldwide, our work is more urgent than ever.

Persons name ⓘ

Les Murray

Personal story ⓘ

Les Murray AM (László Üрге) arrived in Australia aged 11 from Hungary as a refugee. Les became the voice and face of football on SBS. He hos

Appeal Ask ⓘ

Give a \$50 gift to support refugees

Who is this appeal from? ⓘ

Trudi Mitchell, CEO



Create Quality Appeals



AI Assist Output



Dear [Donor Name],

Did you know that there are currently over 79.5 million forcibly displaced people worldwide? That number is overwhelming, but there are individual stories behind each and every one of those people. Today, I want to share one such story with you.

Meet Les Murray. Les arrived in Australia as a refugee from Hungary when he was just 11 years old. Despite the challenges he faced, Les has made a significant contribution to Australian society over the years. He became the face of football in this country, covering eight World Cup events and hosting successful shows such as On The Ball, Toyota World Sports and The World Game. He is truly an inspiration to us all.

But Les is just one of the many refugees who needs our help. Right now, UNHCR is working tirelessly to support those who have fled conflict, disaster and persecution. Our organization provides emergency aid, long-term support, and protection to millions of vulnerable people each year.

We're asking you to help us continue our work by giving a \$50 gift to support refugees today. Your contribution can make a significant difference in the lives of some of the world's most vulnerable people.

Your gift will help provide life-saving essentials, such as shelter, food, clean water, and medical care. Your support will also help us advocate for refugee protection and provide long-term solutions to the causes of displacement.



Analyse your data in natural language!



Your burning analytics questions ⓘ

What is my RG churn rate this year compared to last year? What are the biggest driving factors behind churn?

Generate

Analytics Answer



Notes:

- RG churn rate refers to the percentage of recurring donors who did not renew their support this year
- Assuming "biggest driving factors behind churn" refers to the reasons why recurring donors did not renew their support

Question:

In year to date (January 1, 2023 - May 1, 2023), what is my RG churn rate compared to last year? What are the biggest driving factors behind churn?

Answer:

This year, your RG churn rate is 23%. In comparison, last year the RG churn rate was 18%. The biggest driving factors behind churn this year were lack of engagement (45%), financial difficulties (30%), and moving or change in contact information (25%).



**Interested in AI Assist?
Sign up for the beta!**

<https://www.linkedin.com/groups/14240372/>





Final thoughts

"AI is going to tremendously change what fundraisers can do with data and how they think about interacting with constituents.

However, the core factors of mission, narrative and authenticity will become even more important."

Dave Lyndon
dave@dataro.io

Thank you!

