

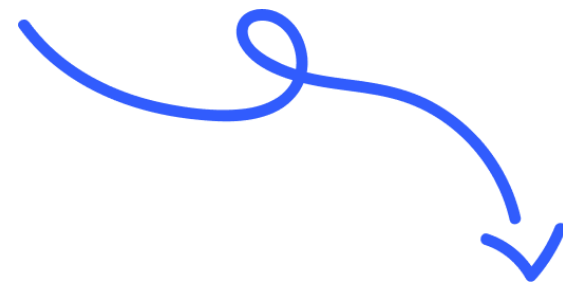
User Testing

**THIS**  
The Human Insight Summit

# Innovating philanthropy: leveraging insights to transform donor education through AI

Giving Compass Philanthropy





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Philanthropy Impact Analyst  
Giving Compass



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**What's the problem in philanthropy?**

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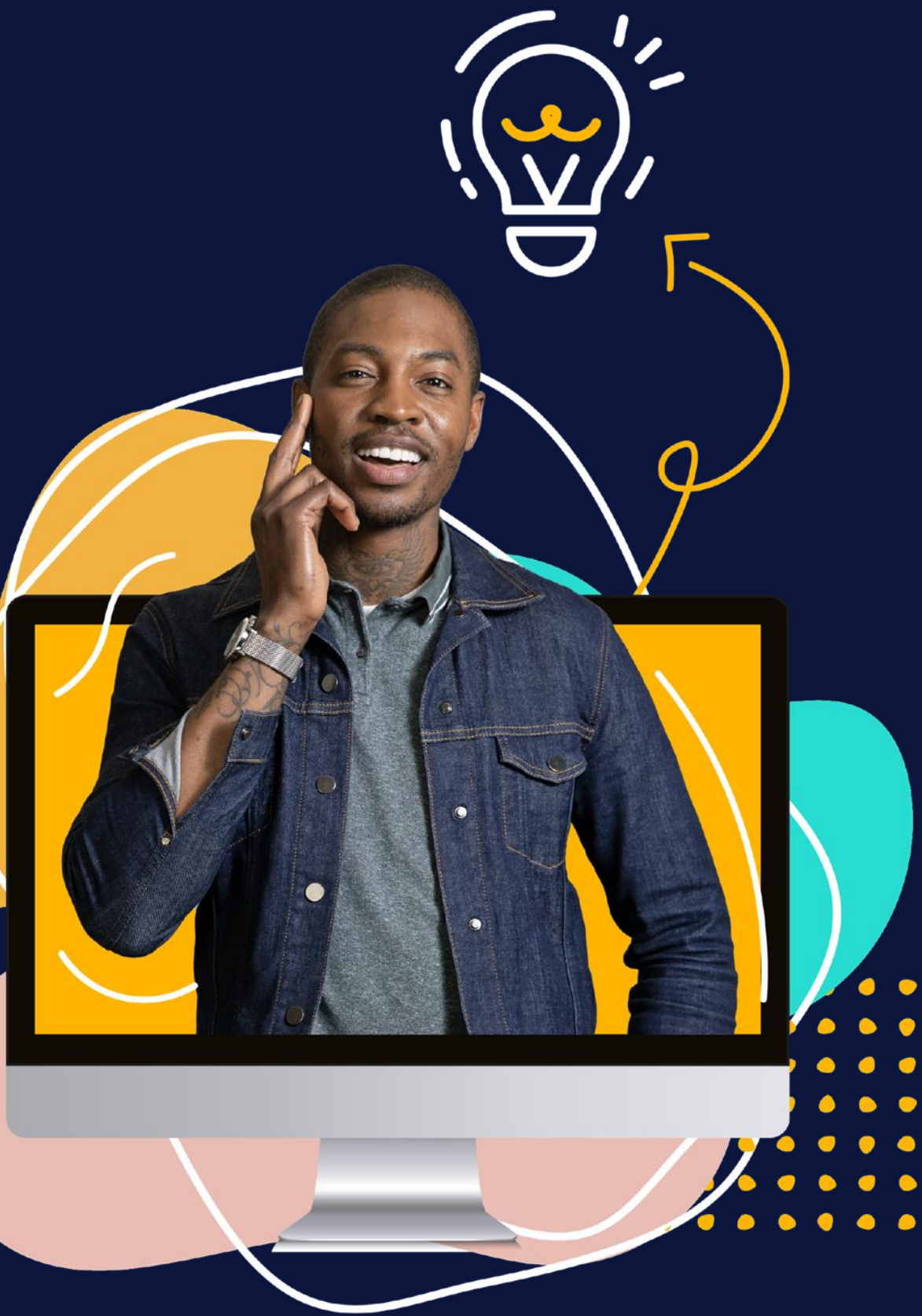
**Cultivating digital trust**

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**Leveraging insights and future innovations**

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# Donor decision paralysis

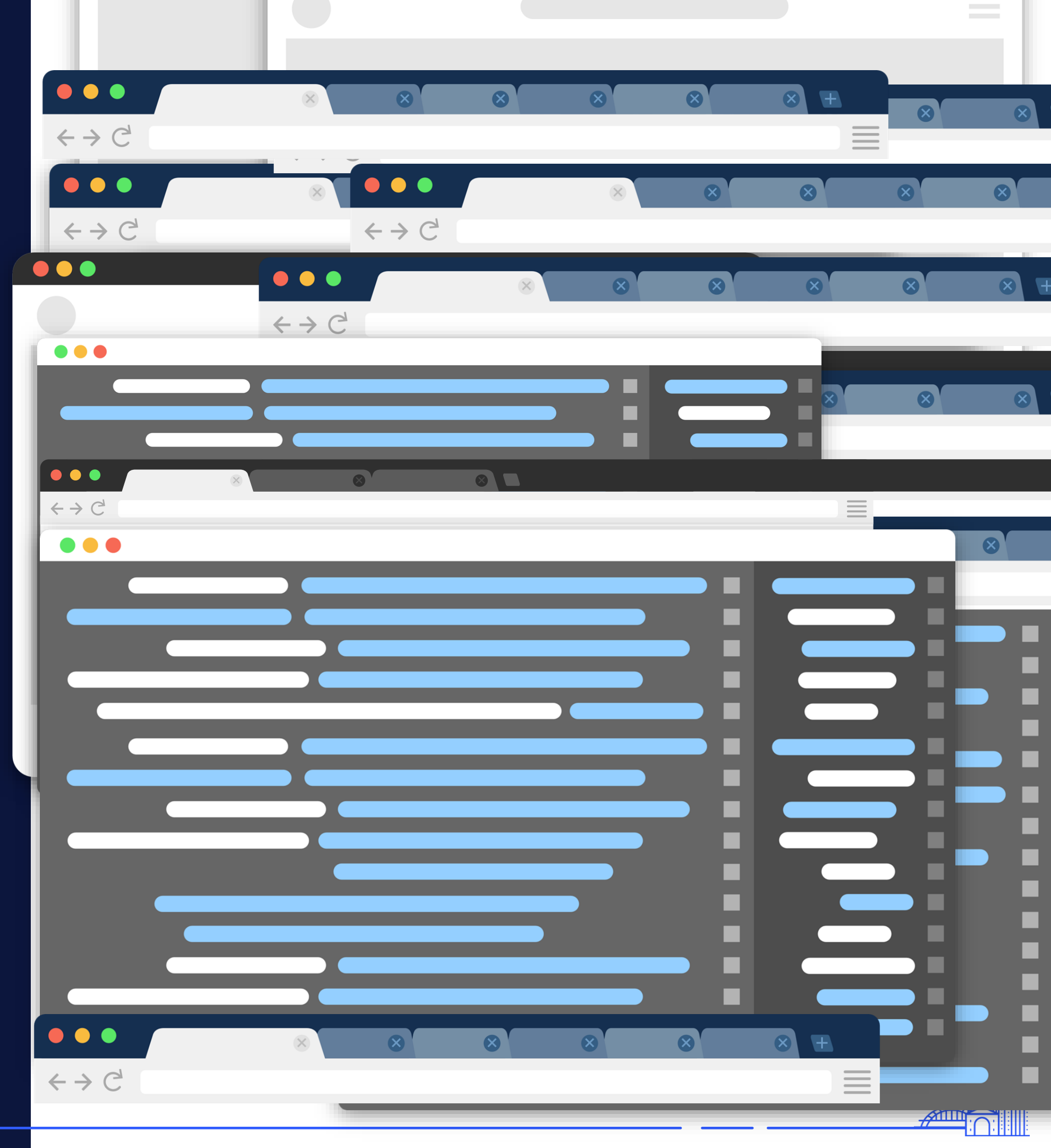


# THE PROBLEM

When it comes to finding information about important causes and nonprofits, donors are often overwhelmed by general search engines or AI tools like Google and ChatGPT.

## You get:

- A flood of generic links and advice
- Information that isn't tailored to your goals or values
- Time-consuming searches with scattered results
- These tools offer endless options, but they're not built for the nuances of strategic giving. What's missing is a trusted guide that simplifies the process and aligns with what truly matters to you.



# The problem - a broken donor journey

The current state of donor search, planning, and reflection does not help donors

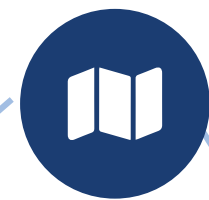


POSITIVE EXPERIENCE



**DAF OWNER**

Our target personas are DAF owners or other engaged donors who are already committed to giving back. Today, exploration, planning, and evaluation are not well supported.



**GUIDE & INSPIRE**



**DEFINE & ACHIEVE**

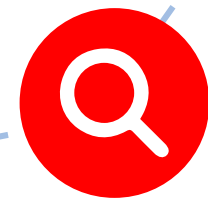


**SHARE & ADVOCATE**

NEGATIVE EXPERIENCE



**ACCESS & INFORM**



**DISCOVER & TRUST**

Simple keyword search and very limited tools available for planning.

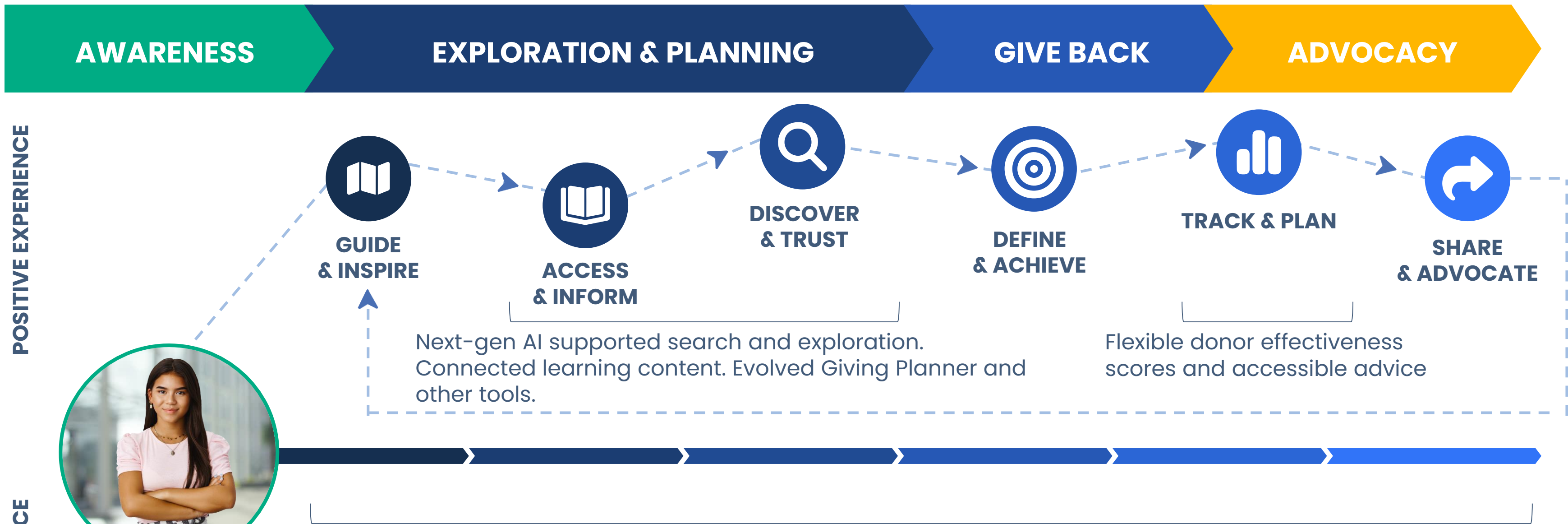


**TRACK & PLAN**

Limited tools for supporting learning and philanthropic advice. The tools that do exist (i.e. philanthropic advisors) are often inaccessible.

# Our goal - streamline this journey

Leveraging innovation and a scientific approach we will enhance the donor's journey



## DAF OWNER

The next phase of Giving Compass will provide donors with more scientifically-backed tools to streamline exploration, planning, and reflection.

We'll leverage data science to understand the donor journey in the same way that organizations like Thrive Global or Noom understand the journey of those trying to improve their mental health or lose weight.



# Giving is personal





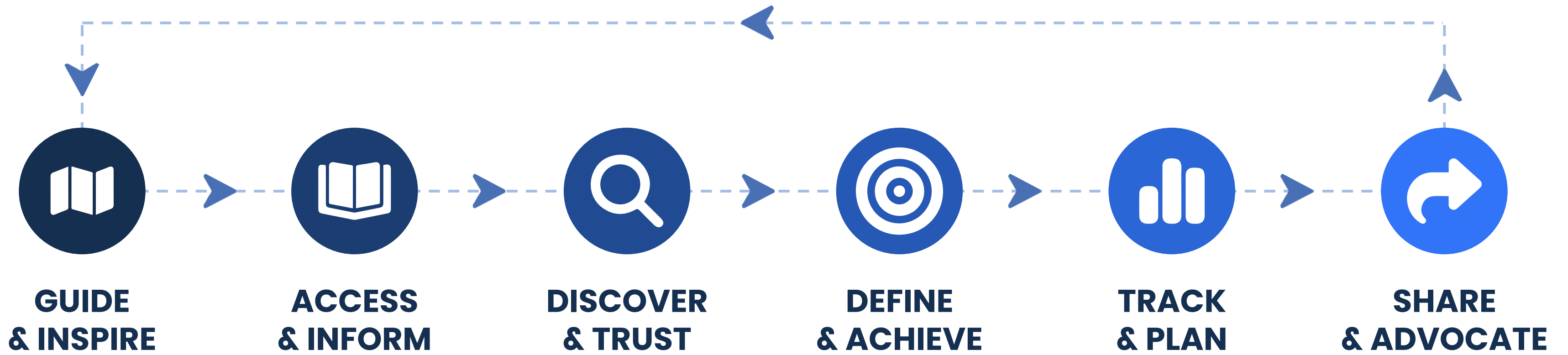


# **GIVING COMPASS**

A one stop shop to help donors learn about issues, get involved and give to community led change. We guide donors toward practices that advance equity and address the root causes of society's issues.

- 100,000 monthly users
- 40,000 pieces of donor education content
- 1.8 million charities





**Streamlining the Giving Journey**



**GIVING  
COMPASS**



**Connecting donors to causes they care about**

# Our thesis in building - guide to good

Four pillars that underpinned how we decided to approach the problem



## Donor education is a behavior change challenge

- Science-backed approach is essential
- Behavior change requires trust, human involvement is essential



## Digital search and exploration are rapidly evolving

- AI is changing the way we search for information
- How to leverage this data ethically?



## The way people want to learn is changing

- Concise, engaging content
- Moving away from long form to microlearning and video



## The power of a platform

- Comprehensive platform
- Allows us to influence users at every step



# Our users and partners



## High-Net-Worth Individuals

Help individuals arrive conversationally at giving strategy with personalized recommendations and deep insights on causes they're passionate about.



## Financial Advisors and Firms

Enhance client portfolios with customized philanthropic strategies and streamlined diligence.



## Giving Platforms

Enhance search with in-product advice and conversational exploration capabilities to not only help donors but educate them.



## Community Foundations

Identify and support critical local initiatives with tools and insights tailored to regional needs and collective community priorities.



## Nonprofits

Enhance engagement with donors through always-on donor education and support on cause area and organizational achievements.

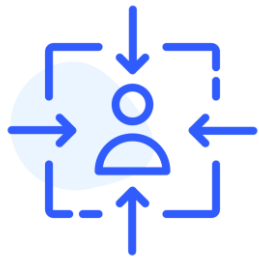




# Bridging the gap: cultivating digital trust

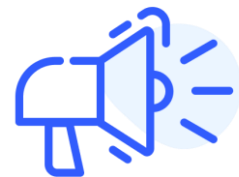


# Using UserTesting to find our audience



## What is a Donor Advised Fund?

- Housed at a foundation or banking institution
- 17% of all annual charitable giving
- \$52 billion in donations annually



## Who is a DAF donor?

- Estimated income \$1.3 million
- Average DAF account size is \$50,000
- Serious about giving strategy



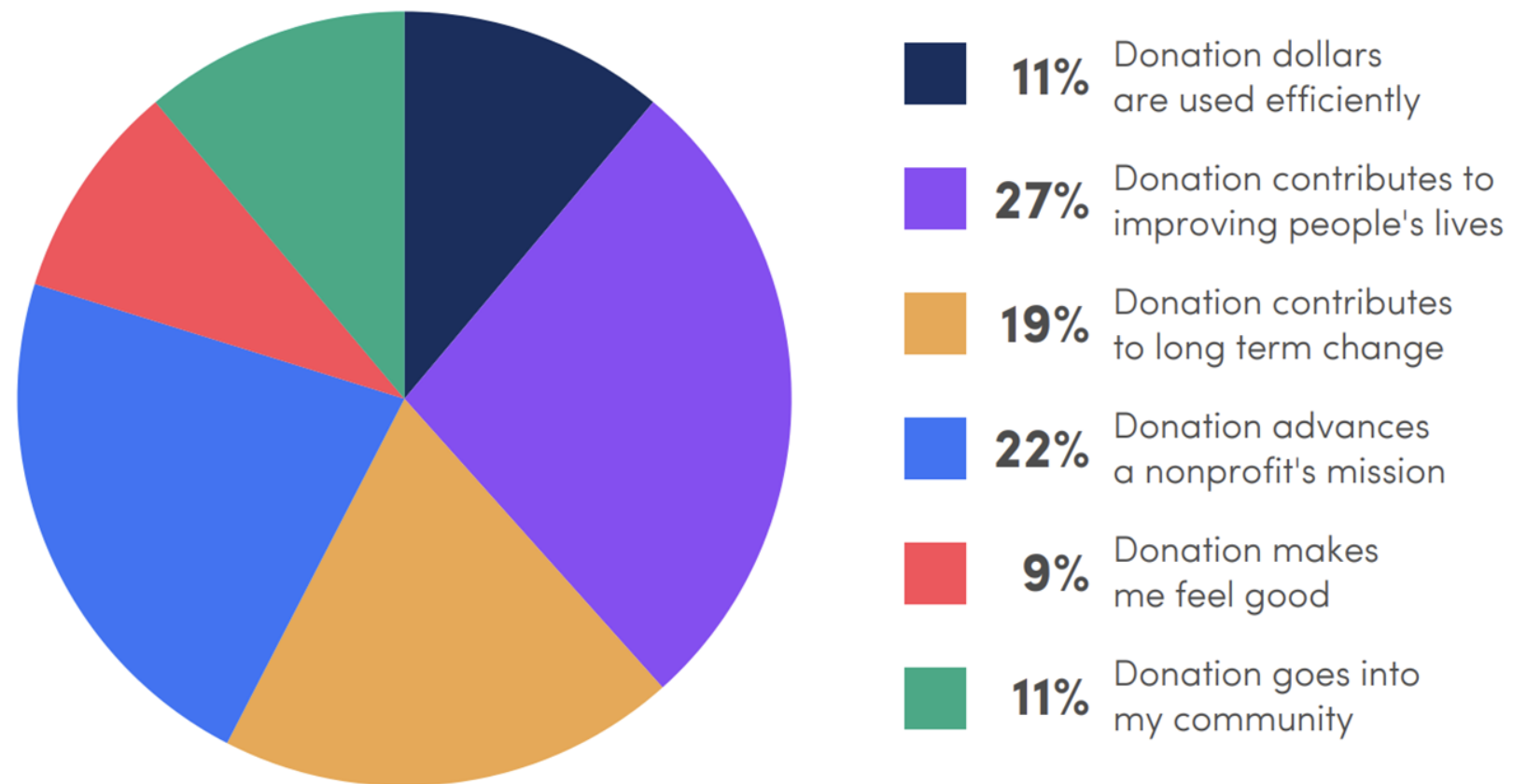
## Our audience on UserTesting

- 88 DAF donors who made a donation in the past year
- 49 men and 39 women
- Age 26 to 72; average age: 44



# Understanding donor motivations

## What Does an Impactful Donation Mean to You?



We surveyed 88 donors to better understand their giving habits and motives for giving so we could try to better connect them with giving opportunities that aligned with their interests.

- Where and how they made their last donation decision
- How do they typically research which nonprofits to give to
- What does an impactful organization mean to them?



# Your most impactful donation...



- ✦ “I donated to a small nonprofit in my community that helps young writers of color get their material published.... I inherited my DAF from my mom who passed last year. She herself was, had been, an artist and gave that up to raise children and she wanted to help young artists starting out. She was also the child of immigrants, so she really cared about immigrant communities and the stories of immigrants so it was a great match with her wishes and that’s why I picked it. My mom was elderly, and was in declining health, but her death was still somewhat of a surprise I think we were not expecting her to go quite so soon, so I’m looking for ways to honor her and her wishes...”

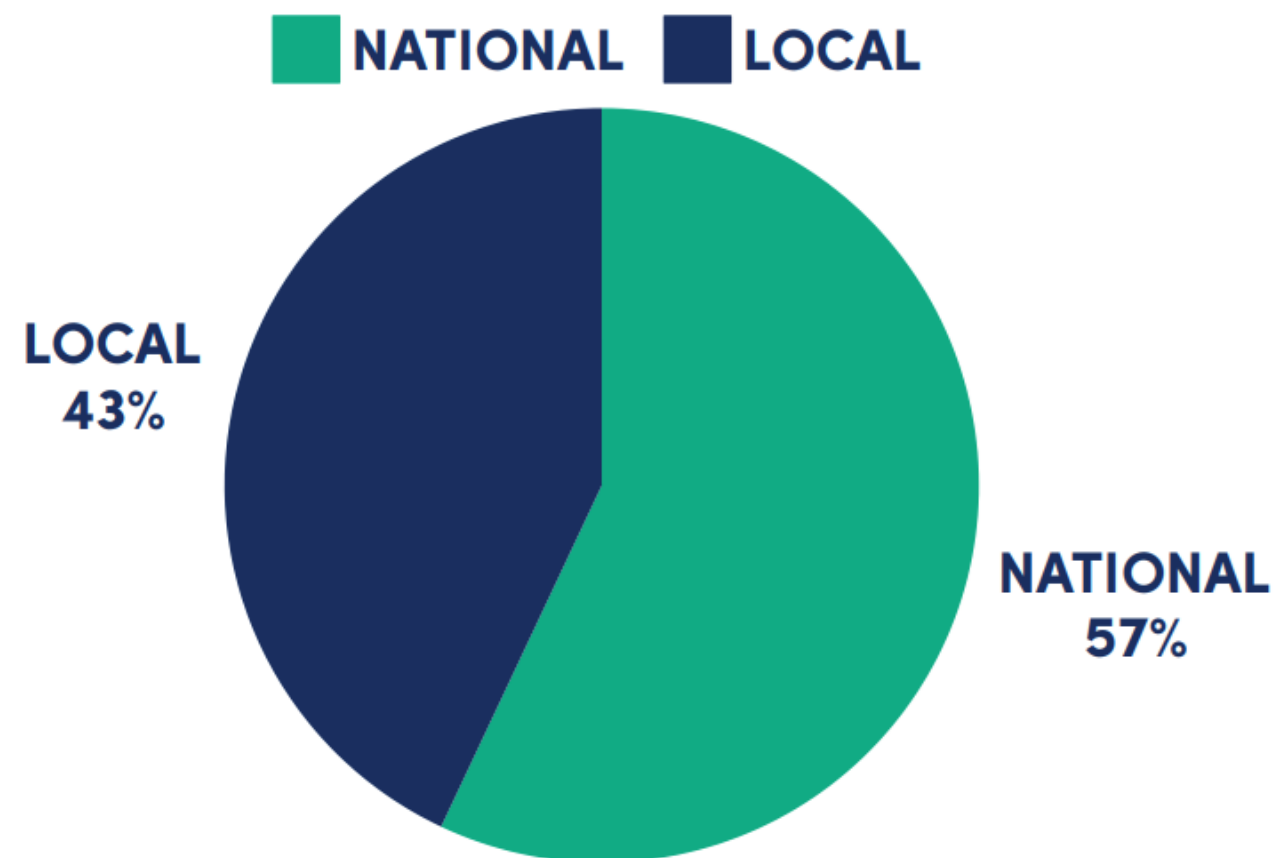
-UserTesting participant





# Majority of donors give to national organizations

Can we connect them with nonprofits in their community?



Donors who reported giving to a national organization noted that they didn't know where to find effective, local organizations.

**57%**

Of donors reported giving to a national nonprofit



NONPROFIT

## GOT GREEN

Seattle, WA, US · <https://gotgreenseattle.org>

### Mission

Got Green organizes for environmental, racial, and economic justice as a South Seattle-based grassroots organization led by people of color and low income people. We cultivate multi-generational community leaders to be central voices in the green movement in order to ensure that the benefits of the green movement and green economy (green jobs, healthy food, energy efficient & healthy homes, public transit) reach low income communities and communities of color.

got green

DONATE

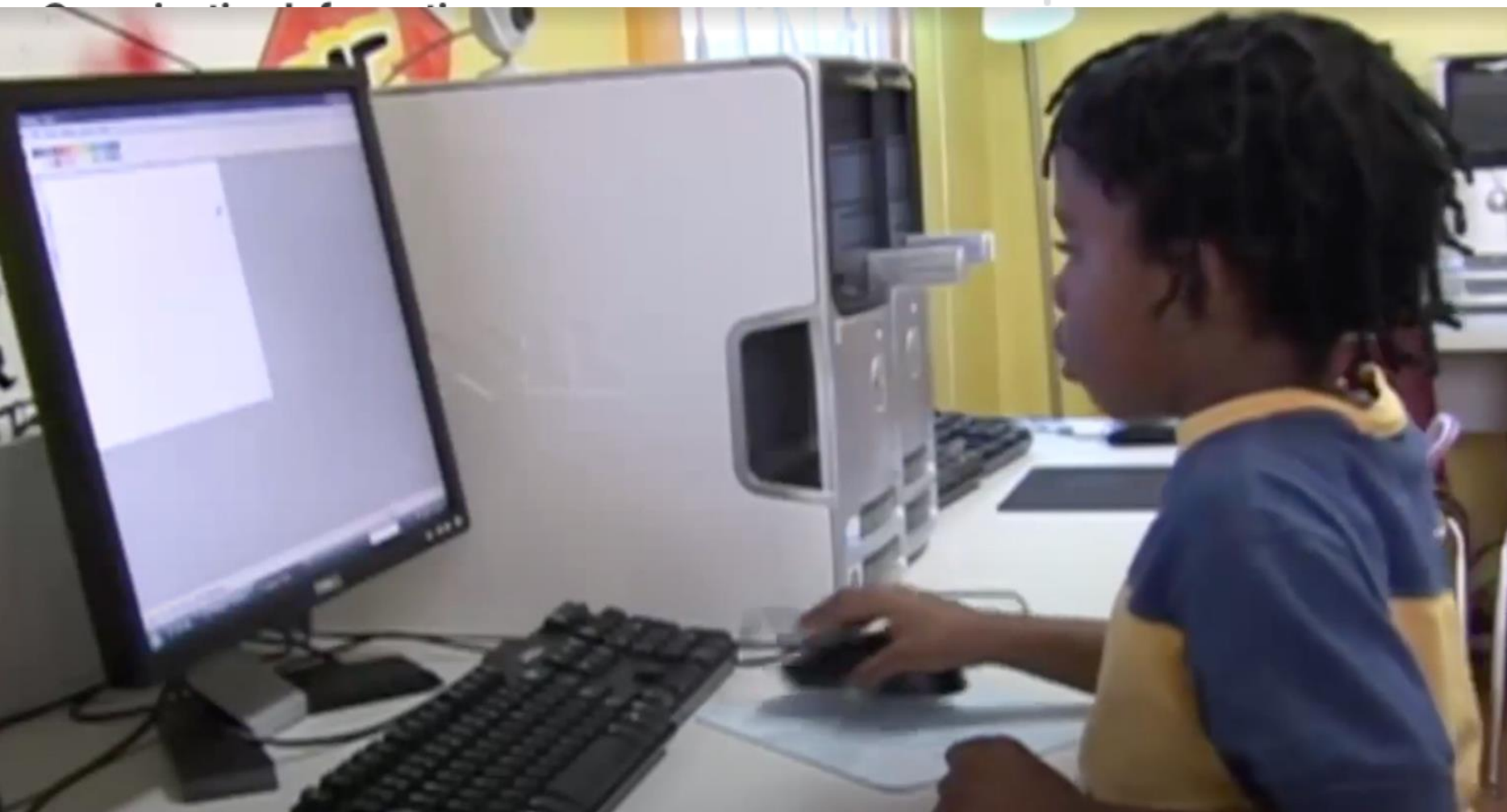
### Submit Your Nonprofit

Is your nonprofit focused on equity and systems change? Reach donors with a profile in our directory. [Learn more.](#)

# Content to change donor behavior

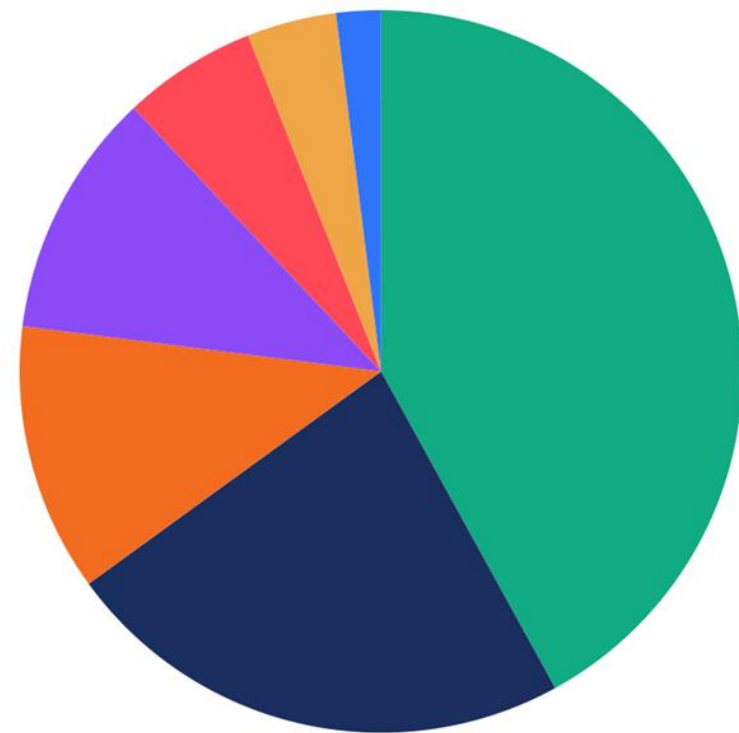
We wanted to know if the right content could change donor behavior, so we conducted an experiment...

- Select your favorite charity and read basic text about it
- Watch a 40 second video on a pre-selected charity
- Rate your agreement with the following statement: "I have enough information to donate"



# Video helps build trust

Donors are more likely to donate after watching a video



## Reactions After Watching Video

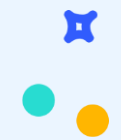
- 42% I see the organization's impact
- 23% Program staff and founder are credible
- 12% Video was professional
- 11% I want to learn more
- 6% Organization is equitable/inclusive
- 4% Organization is growing
- 2% Video had no impact

The video had a dramatic impact on donors, helping them to better understand and connect with the nonprofit and more likely to donate.

# 15%

Overall more likely to donate after watching a video



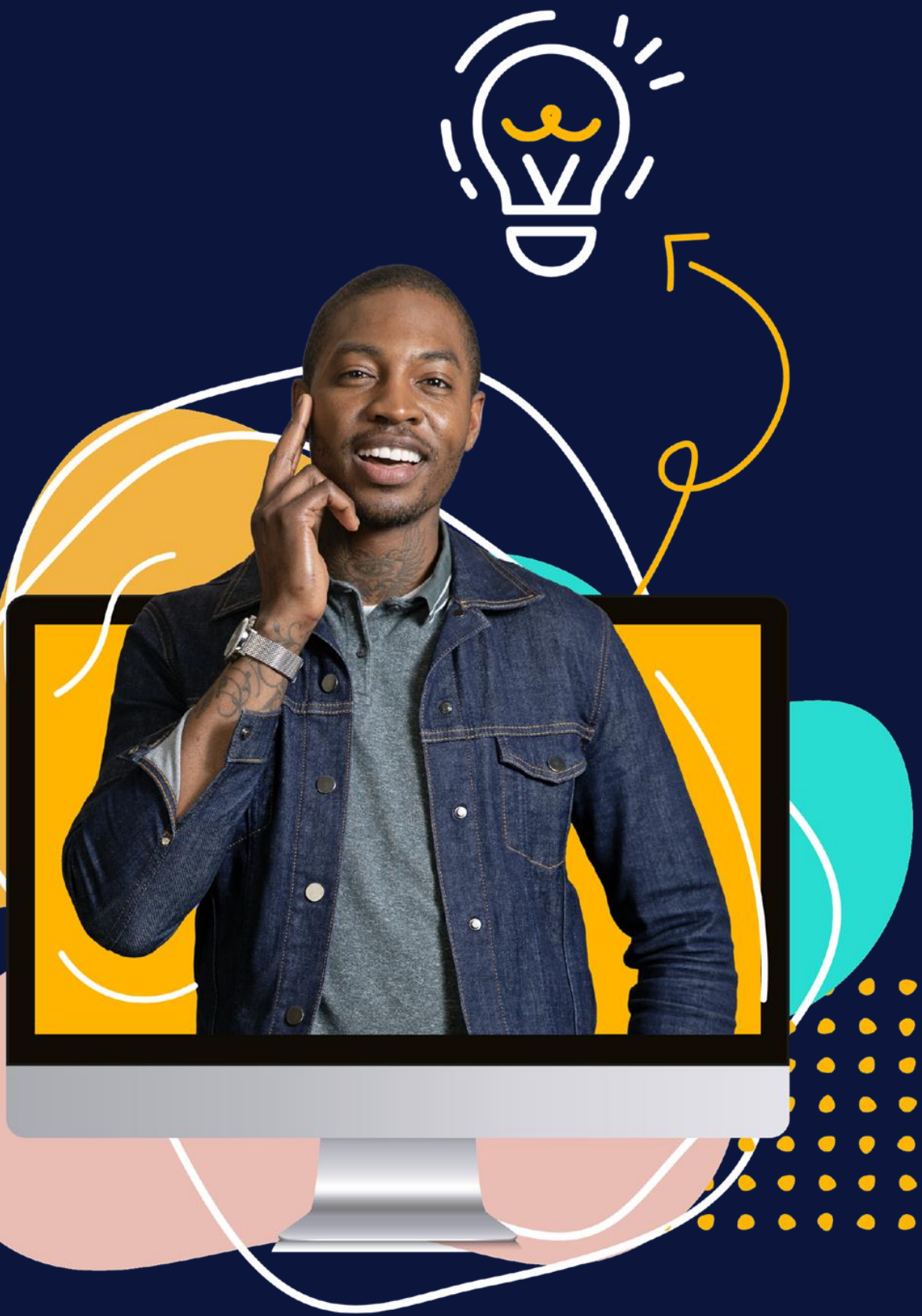


“I felt more of a connection to this organization, and I felt more likely to donate than I did before watching the video because now I know more about what they do, why they do it, and who's involved. There's a face to it now, you know, so it's easier for me to think, wow, they do something that's really cool and it's different. And I knew that before, but again, after watching the video, it really just sunk in just how unique this is.”

-UserTesting participant







# Leveraging these insights

# Scaling impact

How we're using leveraging UserTesting to measure real world donation rates

Now that we know that content changes the way donors interact with nonprofits, we want to know if it'll change the way they give.

- Can we get donors to give?
- Will they give more?
- Will they give to more impactful nonprofits?

We're using UserTesting to conduct a randomized control trial (RCT) with up to \$50 to donate to a charity of their choice or keep for themselves.

- 200 U.S. donors recruited through UserTesting
- 100 donors assigned to a control group
- 100 donors assigned to Giving Compass

We're leveraging these insights to understand how donors search, and developing nudges based on donor profiles.

- Session One: Live UserTesting session searching for a charity to give to
- Session Two: Follow up survey
- Session Three: Follow up survey and donation decision



# Key takeaways

Implications for product development



## Improved UI/UX

- Friendly loading messages
- Improved visibility of nudges
- Updated information displayed



## Data sources

- Diversify our data sources
- Include video and visuals
- Change presentation of data



## Going forward

- Competitive analysis
- Nudge effectiveness
- Stakeholder study



User Testing

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# Thank you!

