

Confessions of a Solutions Architect

Navigating your AI/ML Adoption Journey

Scott Friedrich, MPA, *DSAI Solutions Architect, DonorSearch AI*



1

AGENDA

- Introduction
- State of Healthcare & Philanthropy
- AI in Fundraising: Why AI? Why Now?
- Steps for Successful AI Adoption
- Key Takeaways



2

Introductions



3

DonorSearch AI

Setting the Pace for **Responsible & Beneficial AI** in Fundraising



65
Healthcare Clients



176,702,804
Clinical Encounters



19,790,561
Patients



16,256,018
Donors



96,340,045
Charitable Gifts



\$20,907,919,649
in Donations



63.9 million+
predictions monthly



77,622 ML models
interrogated



48,074,879
Constituents



4

What about **you**?
What **AI tools** are you using?
Predictive, Generative, or **Both**?

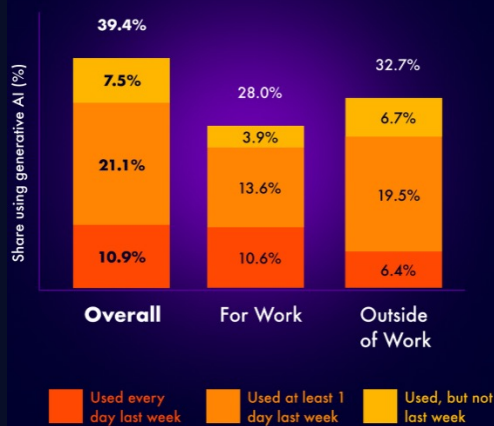


5

The Rapid **Adoption** of Generative AI

39.4% of adults use genAI

Share of Working Age Adults Using Generative AI in August 2024

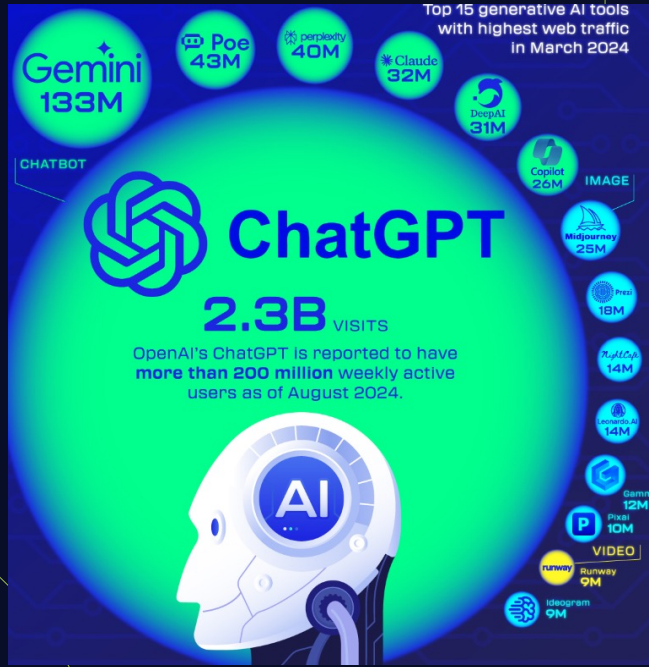


The Rapid Adoption of Generative AI. Bick, Blandin, & Deming (2024)

THE PROJECT ON
WORKFORCE

6

AI Product Usage & Tasks



7

AI Product Usage & Tasks



8

**How, (not if) AI will
change your _____?**



9

**The Burgeoning Need for AI in
Healthcare & Fundraising**



10

State of Healthcare & Philanthropy

18
Million

EXPECTED GLOBAL SHORTFALL OF
QUALIFIED HEALTH WORKERS BY 2030

38X
Increase

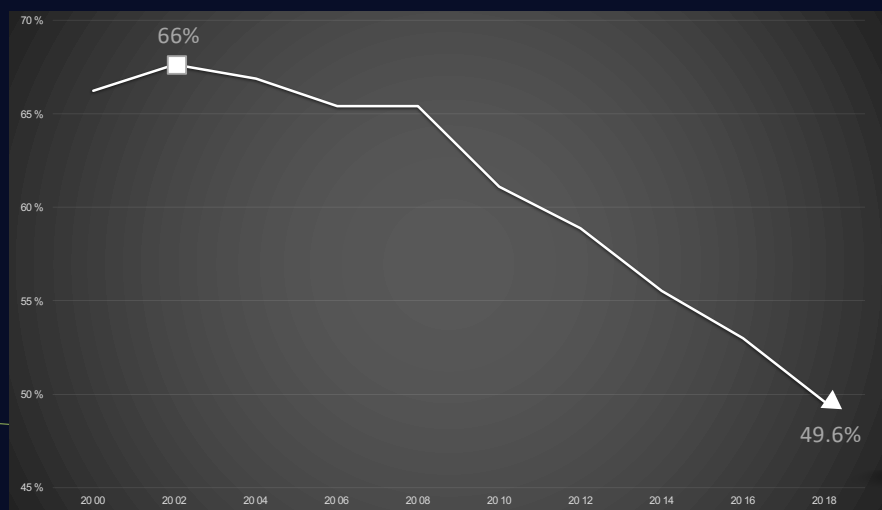
IN TELEHEALTH USAGE IN THE US
COMPARED TO PRE-COVID-19 LEVELS

22.7%
Turnover

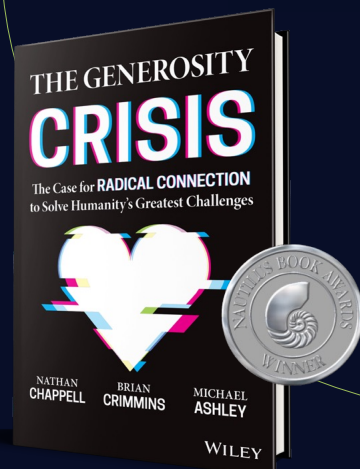
IN THE LAST 5 YEARS, THE AVERAGE HOSPITAL
TURNED OVER 100.5% OF ITS WORKFORCE



11



Percentage of Households that Give to Nonprofit Orgs



12

The need for transformation in philanthropy
has never been greater.



13

Donors and prospects have **more options** to give, **trust less**, are **highly distracted** and have a **25% shorter attention span**.

How much has our **approach** shifted?



14

Declining Trust in Institutions and Its Impact on **Generosity**

Contributing Factors:

Reduced Familiarity
Generational Shifts
Emphasis on Large Donors
Lack of Transparency
Social Disconnection

Rebuilding Trust

Increase Transparency & Accountability
Engage Younger Generations
Strengthen Community Connections



15

97% of individuals are within **three feet of their mobile devices 24 hours a day**

The average person:

- Receives 120 emails per day
- Looks at their phone 262 times a day
- Spends 5.4 hours on their phone per day
- Scrolls 300 feet per day
- Sees 5,000 to 7,000 ad images per day
- Has 80 apps and 12 subscriptions
- Makes purchases based on values



16

Nonprofits are **no longer** competing for dollars;
they are competing for connection.



17

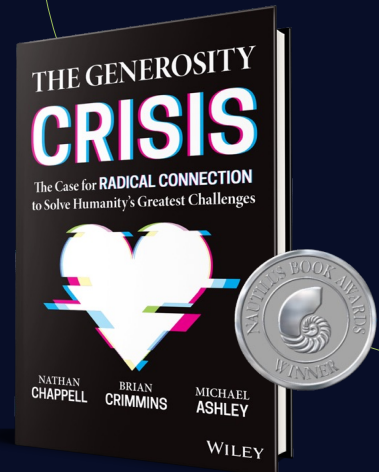
AI can drive tremendous **precision, creativity**
and **personalization** to the fundraising process.

Thanks to AI, we know more about the
motivations of giving than any time in history.



18

“AI is the **only scalable solution** to help reverse systemic declines in charitable giving.”



19

AI (Artificial Intelligence)
 AI stands for artificial intelligence, which is the **simulation of human intelligence** processes by machines or computer systems. AI can mimic human capabilities such as communication, learning, and decision-making.



20



21

What's your AI origination story?
Will AI help or hurt our sector?
How are you building an AI culture?

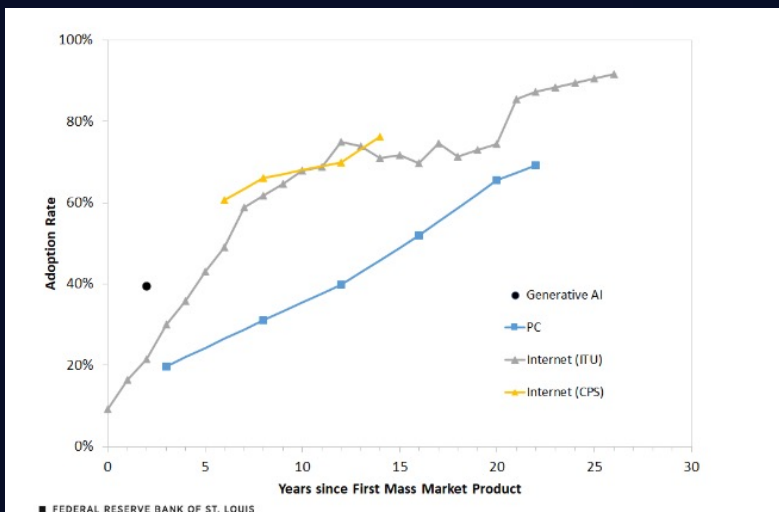
What's your AI Orientation?

A

B

22

More Rapidly **Adopted** than the Internet???



Generative AI has reached nearly 40 percent adoption rate just two years after introduction, far outpacing early adoption rates of PCs and the internet (Credit: Federal Reserve Bank of St. Louis)

23

Understanding Predictive **AI** in **Healthcare Fundraising**



24

THE ROI'S OF AI

- Precision
- Personalization
- Efficiency Boosts
- Increased Quality of Work
- Improved Work Satisfaction
- Improved Clinical Relationships

25

HOW NONPROFITS ARE USING AI

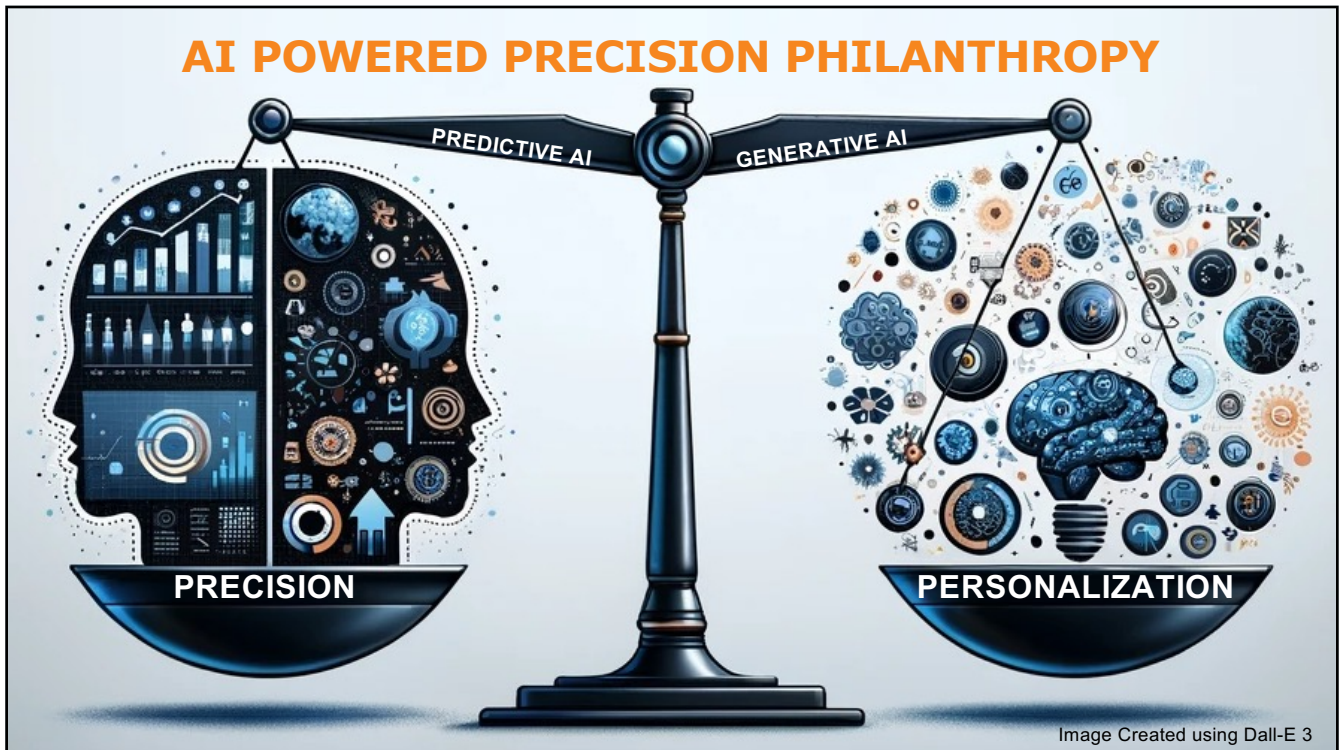
- Predicting Donor Behavior
- Content Creation & Editing
- Grant writing + Review
- DXO + Donor Relations
- Prospect Research + Bios
- Role Playing + Coaching
- Communications + Persona Development
- Data Analysis + Sentiment Analysis



26

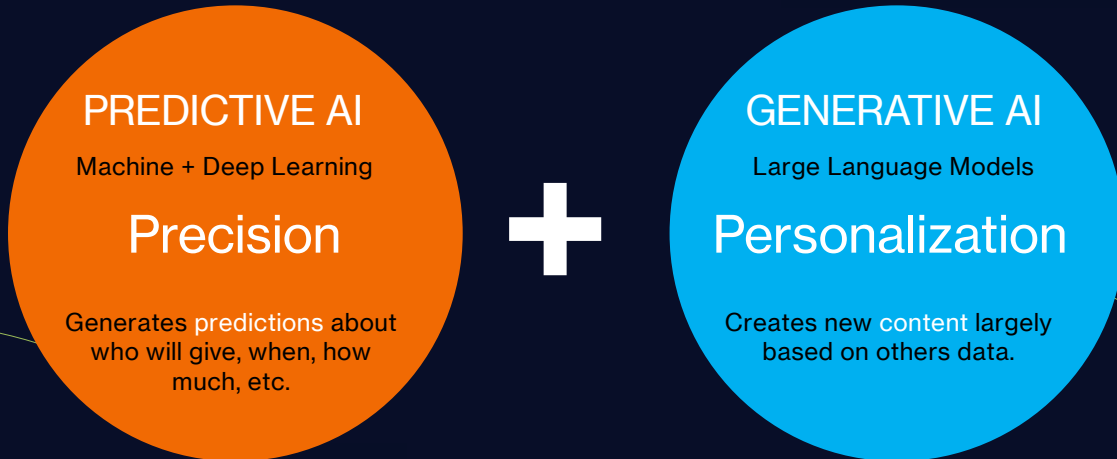


27



28

THE PERFECT BLEND OF PREDICTIVE AND GENERATIVE AI



Combined, these two technologies make for a more TARGETED + PERSONALIZED form of Precision Philanthropy.

29

Predictive AI can help answer questions about what donors and prospects might do in the future.

- Will this prospect make their first gift?
- Will this donor give again within a specific time period?
- Which donors have a greater lifetime value?
- How likely will this donor become a monthly sustainer (giver)?
- Which donors are most likely to be retained?

Generative AI can help create materials and inventive ideas for reaching out to donors and prospects.

- Design personalized marketing materials that appeal to individual donor interests.
- Introduce unique themes or experiences for our next fundraising event.
- Generate social media posts to effectively spread awareness about our cause.
- Creatively recognize donors in a way that encourages long-term relationships.
- Develop new engagement strategies to attract younger donors. B

30

AI CAN SOLVE MODERN FUNDRAISING CHALLENGES

1. Whom to ask?
2. How much to ask for?
3. When to ask?
4. What gift opportunity?
5. Which approach?
6. Which clinicians to partner with?

31

BENEFITS of Predictive AI DEPLOYMENT

1. Enhanced Donor Insights
2. Improved Fundraising Strategies
3. Increased Donor Retention & LTV
4. Clinical Partnership & Engagement

32

Steps for Successful **Deployment & Adoption**



33

While AI for nonprofits is a given.
Effective implementation is not.

Irresponsible AI practices **will** further
exacerbate and **accelerate** the decline in
charitable giving.



34

Take a deep breath.

- **70%** of AI transformation has **nothing to do** with data or models.
- AI transformation **is a journey**, not a destination
- AI transformation is **not about replacing**. It's about augmenting.



35

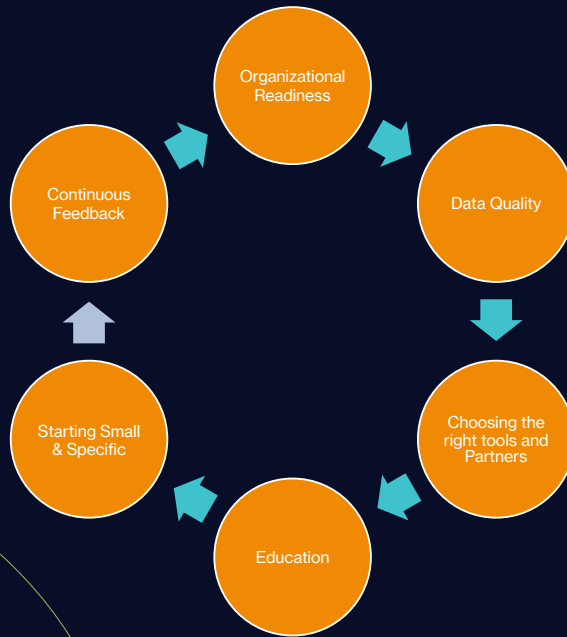
NONPROFIT AI ESSENTIALS

- 1. Start small:** Identify the problem, then apply the right tool
- 2. Verify then trust:** Understand your privacy settings
- 3. Be transparent:** Have an AI governance policy & disclose
- 4. Be authentic:** Keep humans in the loop
- 5. Be curious:** Assume AI can be helpful
- 6. Assume today will be the worst AI you will ever use**



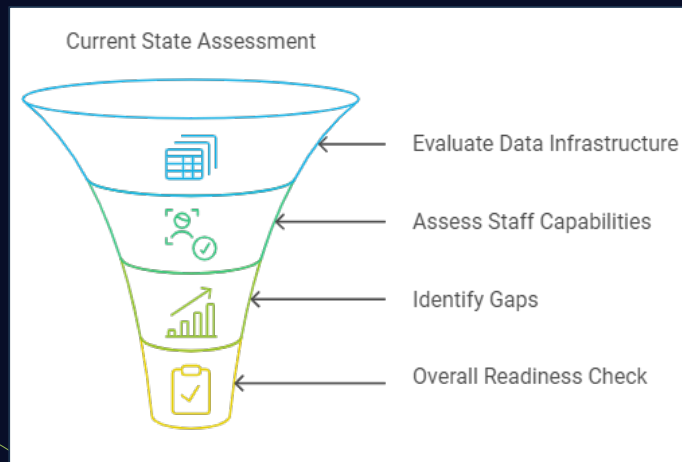
36

Predictive AI Deployment Success



37

Is your organization AI ready?



38

Invest in **Data Quality**

- What types of CRM/EMR donor and nondonor engagement datasets are available?
- Bring compliance, marketing, legal, patient advocacy, and clinical champions in early and often
- Legacy vs Active Data
- Donor-centric vs non-donor-centric
- Are you or do you plan to migrate to either a new EMR or CRM conversion?
- Is your data an indicator of engagement?
- Do you have five years within that data set for model training and target?
- Do you have the staff and/or resourcing to support monthly refreshes?



39

Choosing the Right **Tools & Partners**

- Ask potential AI vendor partners if they build bespoke modeling, can provide transparency throughout the model build process, how often they can support refreshes, and what support they provide clients in deployment
- Ask for client references
- Bring compliance, marketing, legal, patient advocacy, and clinical champions in when appropriate. Building and deploying AI/ML modeling will take your entire team



40

Start Small but Be Specific

- What specific outcomes are you looking to achieve once you have deployed your AI modeling scores?
- How does your current donor engagement and patient acquisition strategy align with modeling results?
- How will feedback from your team get back to your vendor partners so that qualitative improvements can be made?
- Who will be a part of your pilot group?
- Deploy A/B Testing
- Are there any deployment barriers that might cause slower adoption or utilization of the AI modeling scores in tactical and strategic decisioning?
- Do any of your development, clinical, board, executive leadership, and stakeholders need further training?



41

Continuous Feedback

Explain the continuum of care? When should I be reaching out?

Is this a health hold?

How can we help build a partnership? What do you need to take you're are of practice to the next level?

Clinicians: Nursing, Physicians, Officer Managers, Leadership, Case Managers, or anyone involved with care provision

AI + CI + FI = GPP Success

If a health hold, then, ask when and why?
Communicate back to your team and vendor

Share patient gratitude, success, and data curation.

Include clinicians beyond referral

Does this list match your expectations? If not, who is missing?



42

Myths & Takeaways

Myths:

1. Everyone is a prospect, right?
2. Does age and distance matter?
3. Tears of gratitude dry quickly
4. Data doesn't build relationships, I do?
5. Clinicians are referral sources

Takeaways

1. Executive/Clinical/Nursing/Board leadership is necessary
2. Expand your definition of stakeholder involvement
3. Bring something to the table for your clinician/nonclinical champions
4. Connect with your clinician teams for data flags that mirror continuum of care
5. Focus on patient care



43

Responsible AI is Everyone's Responsibility.

- Build AI governance/use policies that protect and prioritizes **humanity over utility**.
- Use incentives that measure **short-term gains** but also evaluate **long-term implications**.
- Leverage principles of **Responsible + Beneficial AI** to support a more generous future for all.



44

LET'S CONNECT!



www.donorsearch.net
www.fundraising.ai



DonorSearch.net
Fundraising.AI



scott.friedrich@donorsearch.net

Check out the
Fundraising AI
podcast

