



DONORSEARCH

APRA PD BALTIMORE, MD 2025

Major Gifts, Smarter Research: The AI Advantage Explained.

Sarah TeDesco, COO, DonorSearch

Apra PD Baltimore, MD 2025

Major Gifts, Smarter Research: The AI Advantage Explained

- **Introduction to DonorSearch**
- **Prospect Research Methods**
 - Traditional vs. AI-Enhanced
- **Reflections on AI & Major Gifts**
- **AI Advantage & Use Cases in Action**



DonorSearch, Sarah TeDesco

COO | Co-Owner | Nonprofit Champion



Nice to Meet You!

Chief Operating Officer & Co-Owner, DonorSearch

- 18+ years in prospect research & the nonprofit space
- Helped proudly build DonorSearch, established in 2007, from the ground up — family-owned
- MBA with a heart for operational strategy, marketing and people-first leadership

Fueled by Data & Driven by Purpose

- Passionate about using data and new technology to drive impact and empower nonprofits
- Always looking for ways to streamline, scale, and support teams that make a difference

Life Outside the Office

- Mom to a 1.5-year-old 🌈 and a lovable pup 🐕
- Loves playing outside, exploring new places, and making memories in nature
- Big fan of morning coffee, reading and spontaneous adventures!

About DonorSearch

Empowering Nonprofits since 2007

Vision

We dream of a world where every nonprofit, regardless of size or budget, has access to top-tier prospect research and intelligence data. We're committed to making this a reality.

Mission

We strive to enhance the financial capacity of nonprofits through superior donor intelligence. Whether you're a small community initiative or a large-scale operation, our goal is to equip you with the tools you need for impactful fundraising.



40 + CRM Integration



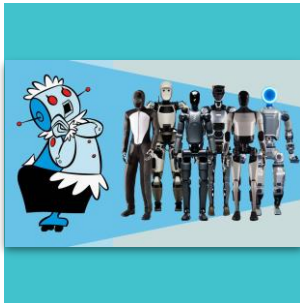
API BASED APPLICATIONS



**Let's begin today by
reflecting on your
experiences with AI...**

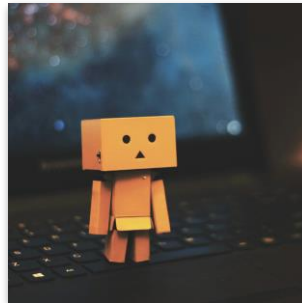


Reflections about YOUR Journey with AI



First Encounter with AI

When was the first time you heard about AI?
Or when was the first time you were really
excited about AI?



Deciding to Take AI Seriously

When did you decide to take AI seriously?
What did that look like?



Goals for Today

What are you hoping to accomplish today
with AI and Major Gifts?

As AI continues to evolve and become more prevalent in our lives, it's important to stay informed and explore the ways in which this technology can be used to improve our world.

Everyone's talking about AI... but are they really using it?

Widespread Adoption

88%

People who interact with AI daily (even unknowingly)

ChatGPT

2.5B Prompts Daily

Global Number of Daily Prompts

ChatGPT Users

122-180M Daily Users

More than half of the population

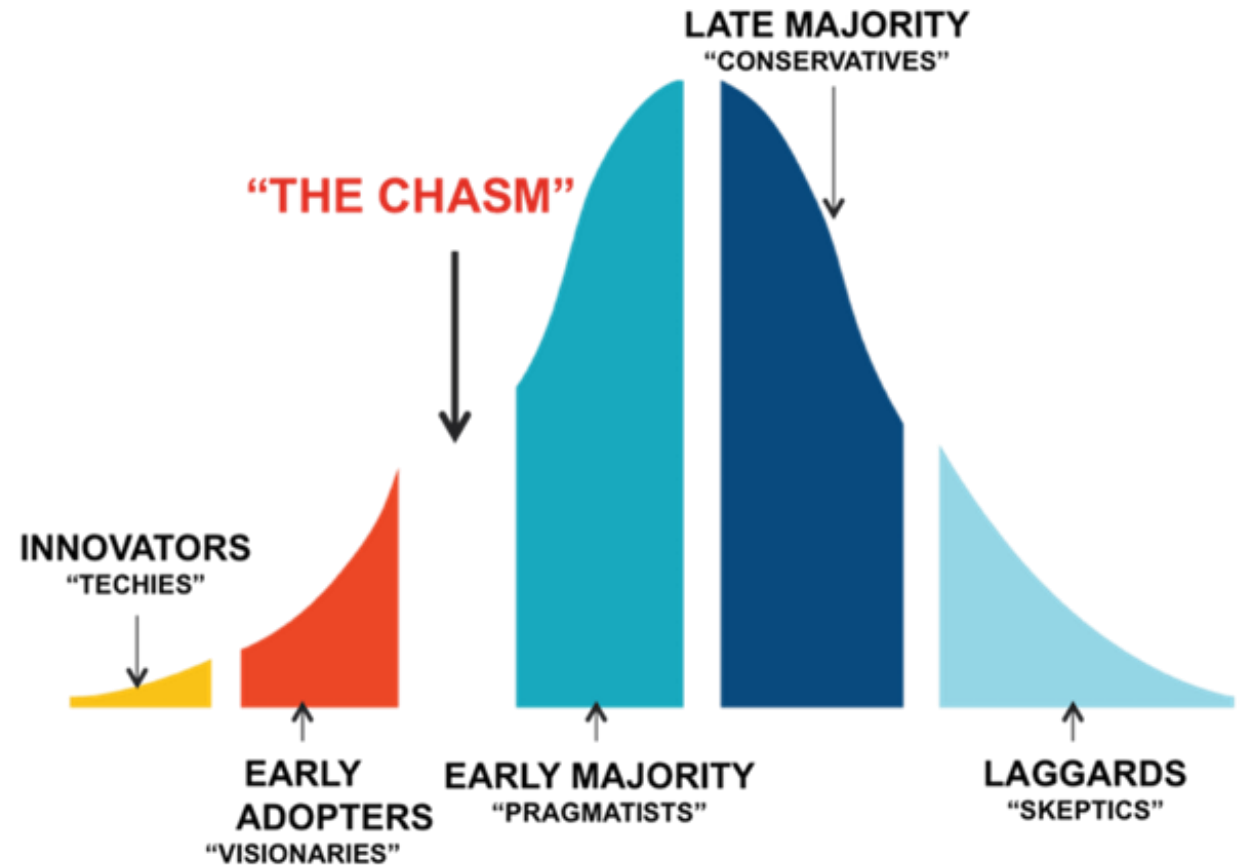
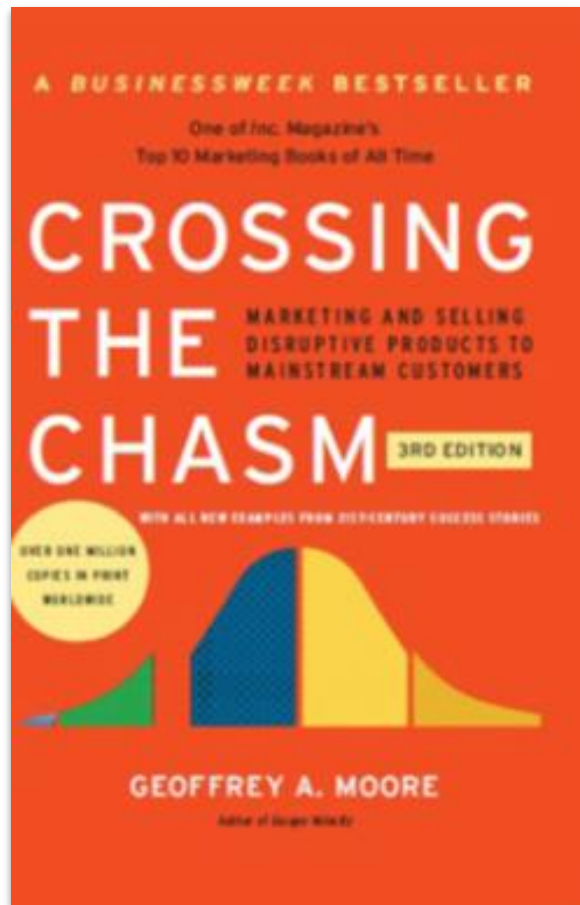
AI In Everyday Life

40%

US mobile users using voice based AI daily

HOLD ON
LET ME
ASK
CHAT GPT

From Hype to Habit: Crossing the Chasm



Pre Covid: State of Artificial Intelligence in Nonprofit Sector



AI Makes Life Easier

75% of people believe that AI technology makes their lives easier.



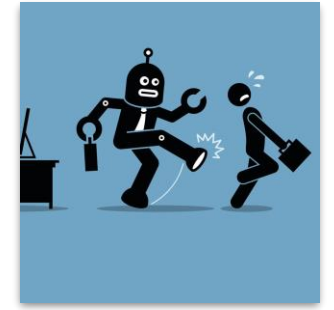
Nonprofits Embrace AI

73% of nonprofits believe that AI innovation aligns with their organizational beliefs and goals.



Ethical Framework Needed

83% of people believe that an ethical framework needs to be in place before wider adoption of AI technology.



Fear of AI

52% of people are afraid of the potential impact and consequences of AI.

Early Wins, Ethical Questions & Big Bets: AI in the Sector



AI Adoption is Accelerating

65% of NPOs are exploring or using AI

Only 24% have an actual strategy



Ethical Practical & Readiness Concerns

83% believe an ethical framework is needed

Only 4% feel fully ready for AI

While 70% cite data privacy and governance as blockers



AI Delivers Real Impact for Early Adopters

48% report fundraising increases

54% say AI improved donor segmentation

10+ hours/week saved by AI automations



Funding Momentum Shows Sector Commitment

OpenAI's \$50M fund for Nonprofits

\$1B commitment over 15 years by Gates, Ballmer, Ford, Open Society, and Schmidt Futures

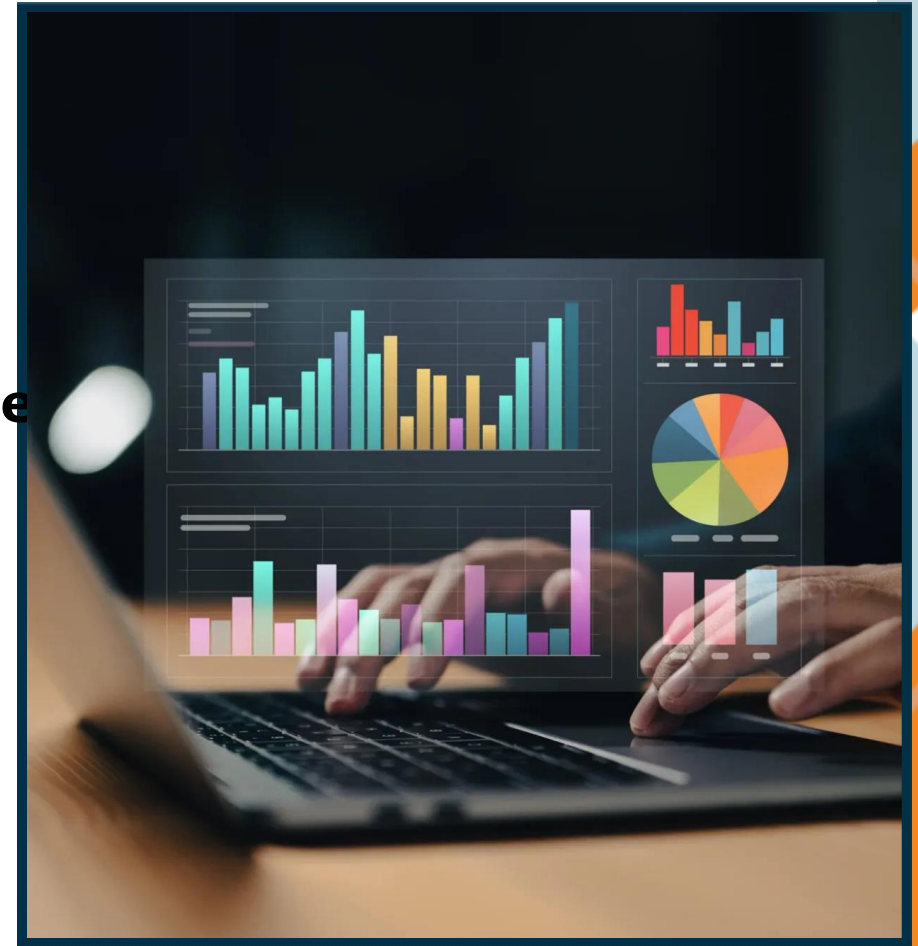
Understanding the Difference

	Generative AI	Predictive AI
What it does	Creates new content	Forecasts outcomes based on patterns in data
Common Tools and Examples	ChatGPT, Claude, Microsoft Copilot, Google Gemini, DonorSearch Profiles	DSAI, Microsoft Azure, Amazon, Netflix, Spotify
Strengths	Speed up writing and synthesis	MLR (Dynamic RFM), prioritize outreach and surface trends
Limitations	Can hallucinate or be wrong	Data integrity and structure
Best used for...	Summarizing, exploring ideas, email response, creativity blockers	Targeting, timing, portfolio management, segmentation, strategy

How Predictive AI Helps Fundraisers

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 is it that this donor will become a monthly sustainer (giver)?**
- **Which donors are most likely to be retained?**



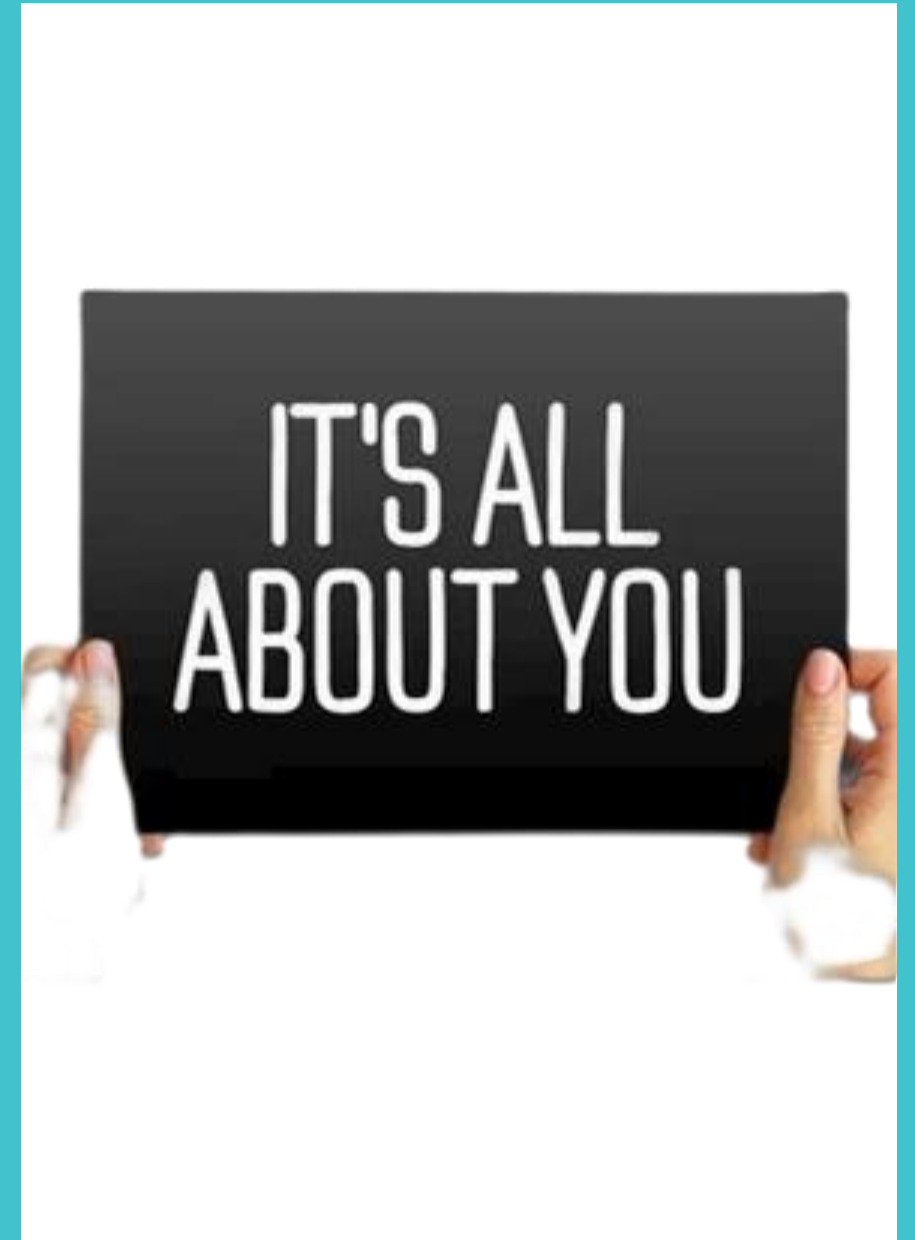
How Gen AI Helps Fundraisers

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

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



**Now, your reflections on
Major Gift Research...**



Reflections about YOUR Experience with Major Gifts



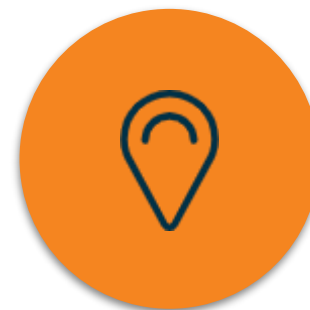
First Prospecting Breakthrough

When was the first time your research led to a major gift discovery?



Evolving Your Research Approach

How has your process changed in response to new tools, data, or strategy?



Goals for Today

What are the major gift goals you have within your organization?

Major gifts are more than dollars—they're about mission alignment, timing, and trust. Reflecting on our journey helps us refine our future impact



What we Know About Major Gifts

Defining Major Gifts

Major gifts are the big ones—the donations that move the needle.

But what counts as “major” isn’t one-size-fits-all. It depends on your nonprofit’s size, giving history, and what your typical donor gives. For some, it's \$5,000. For others, it's \$500,000. Either way, they matter.



Major gifts constitute your organization’s largest financial contributions

They have the highest Return on Investment

We NOW see 90-95% of most fundraising totals come from only 5 or 10% of donors

Major Gifts Need Prospect Research

*Early anecdotal evidence suggest combining AI with traditional research
could push major gift goal success beyond 90%.*

<i>Approach</i>	Meets Major Gifts Goals Almost Every Year or Sometimes	Seldom or Never Meets Major Gift Goals
No Prospect Research	65%	35%
Uses Prospect Research	84%	16%

2024 Charitable Giving in the United States

Total Giving Rebounds at \$592.5B

In 2024, total charitable giving in the United States reached a record high of \$592.5 billion, representing a **6.3% increase** from the previous year.

Individuals Lead the Charge

At **66% of all giving**, individuals were the largest source of charitable contributions, giving a total of \$392 billion, an 8.2% increase from 2023.

Precision is the New Power

Mega Giving remains **"flat" at \$11.72 billion** and the number of **smaller donors is declining** - the middle is disappearing.

Economic Confidence Drives Giving

People give when they **feel secure** — and in 2024, that came from a strong economy, stabilizing inflation and rising consumer sentiment.

Foundation and Corporate Giving Matter for Strategy

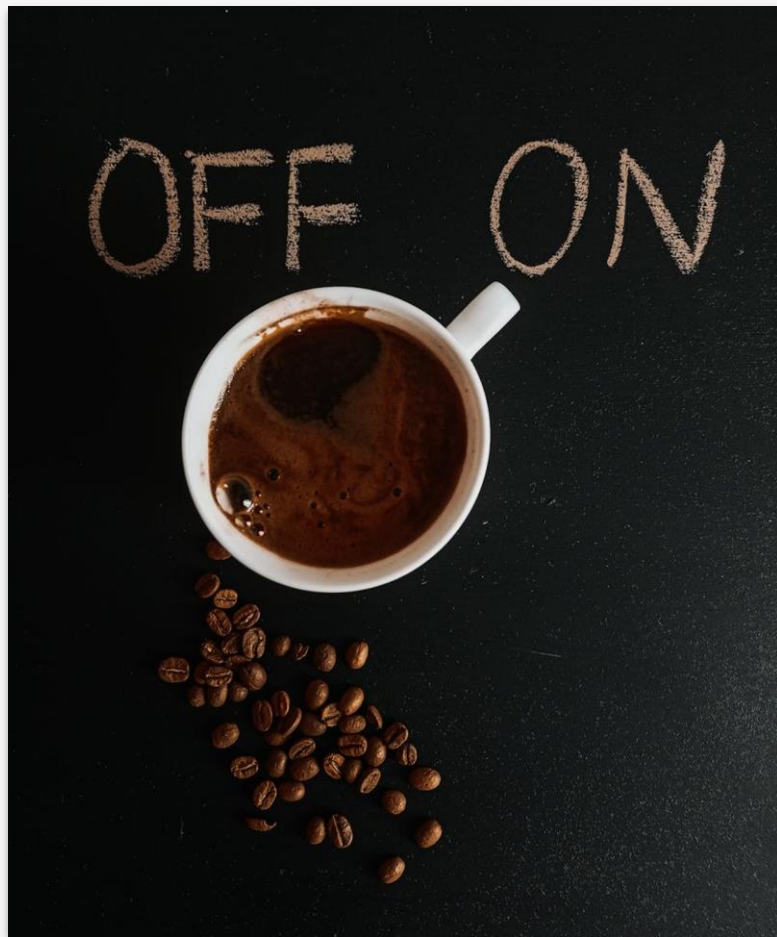
Foundation giving exceeded \$100B for the third year straight. **53% of community foundation giving now goes through DAFs** — a massive shift in giving vehicles. Corporate giving climbs to \$44 billion — a 9.1% increase over the previous year.

The **Mega** Donors

- Average gift size is rising—while small-donor participation continues to decline
- Reliance on known names won't sustain future major gift pipelines
- Understanding donor behavior is becoming more complex but timing and alignment is everything



What this Means for Researchers



Focus your lens on donor behavior & major gift potential

→ Drive connection

Expand beyond the usual suspects

→ Use data to identify emerging major donors, not just repeat givers

Stay alert to policy shifts

→ Economic challenges, messaging, and impact on HNW individuals

AI Advantage: Smarter Research & Stronger Major Gifts

Speed

From days to minutes - accelerate research, screening and segmentation.

Precision

Identify high potential major donors with data backed precisions.

Personalization

Tailor messaging based on giving history, interests and engagement patterns.

Scalability

Enables small teams to act like big ones—working smarter, not harder.

Insight

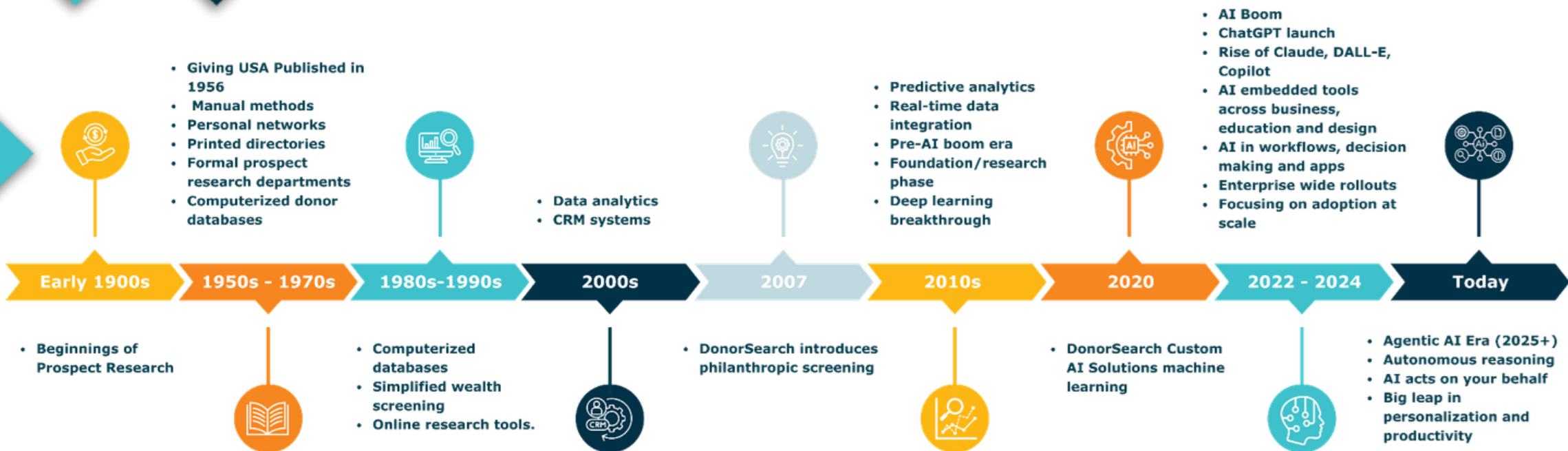
Surface hidden patterns in donor behavior and giving capacity





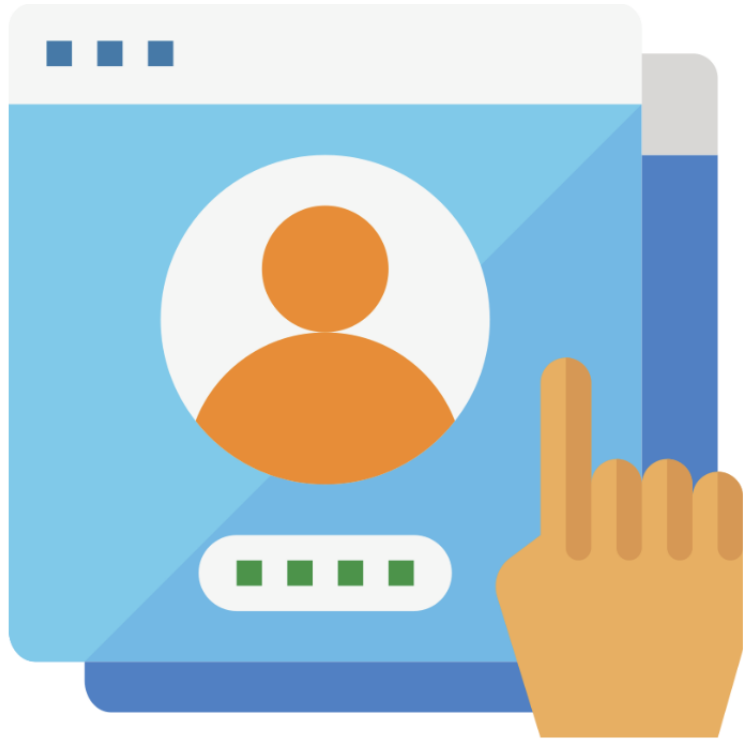
Traditional Methods of Screening and Prospect Research

Brief History of Prospect Research



Today Generative and Predictive AI fundraising solutions are available for a NPO of any size.

Importance of Traditional Methods in Laying the Foundatio



- **Establishing basic donor profiles**
- **Building relationships and trust**
- **Understanding donor motivations**
- **Identifying high-potential donors**
- **Laying the groundwork for data-driven approaches**

Markers of Philanthropy

- In 2007 DonorSearch looked at **5 billion dollars** in known charitable giving to over **400** nonprofit organizations.
- The donors were analyzed to determine what factors made someone **more or less** likely to give a major gift.



Predictive Markers for Major Gift Donors



**1: Giving to YOU
(Internal Giving)**



**2: Giving to OTHERS
(External Giving)**



**3: Foundation
Trustees**



4: Political Giving



5: Real Estate



**6: Business Affiliations
(SEC, Privat Cos)**



Transitions to Modern Techniques

Overview of Modern Technologies

Artificial Intelligence (AI):

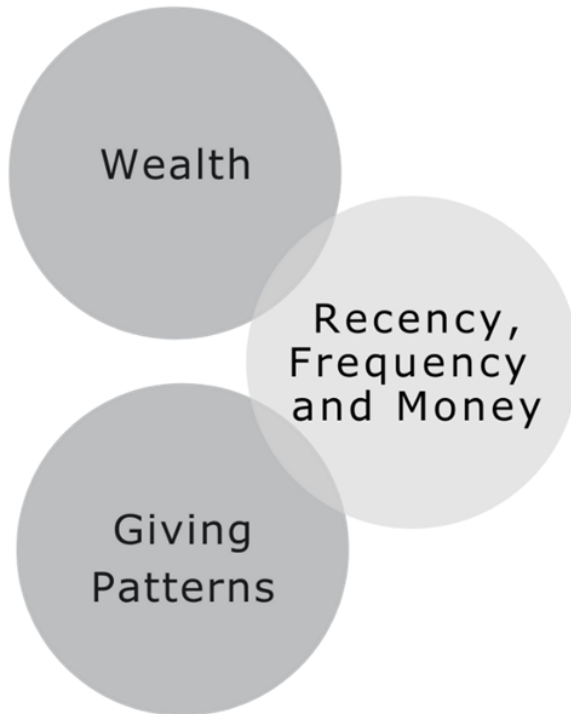
- AI refers to the simulation of human intelligence in machines programmed to think and learn. It encompasses various subfields, including machine learning, natural language processing, and computer vision.
- AI systems can perform tasks that typically require human intelligence, such as recognizing patterns, making decisions, and predicting outcomes.

Data Analytics:

- Data analytics involves examining large datasets to uncover hidden patterns, correlations, and insights. It uses statistical and computational techniques to transform raw data into meaningful information.

Bringing AI to Screening

Standard Models

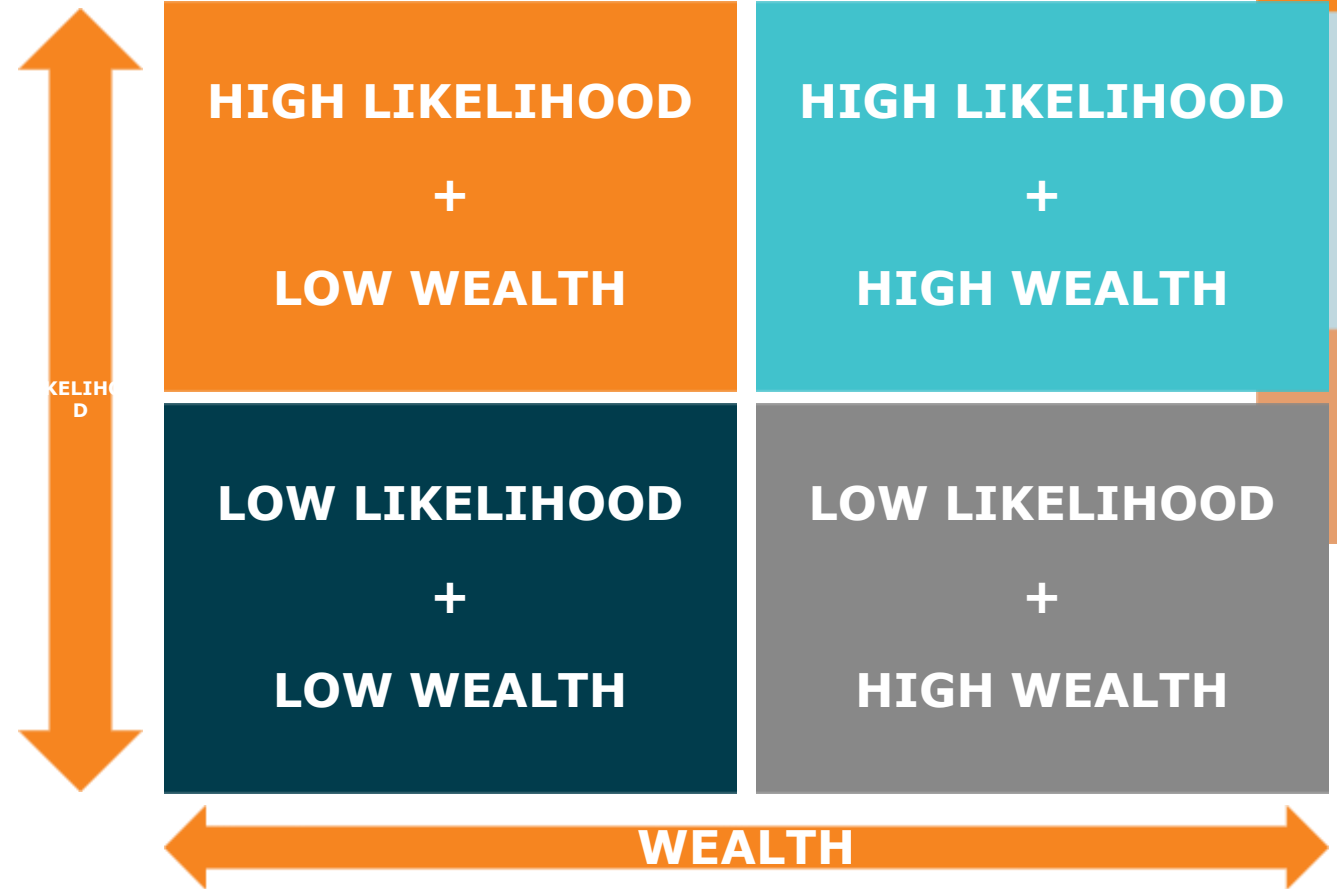


Machine Learning Models



Likelihood Segmentation

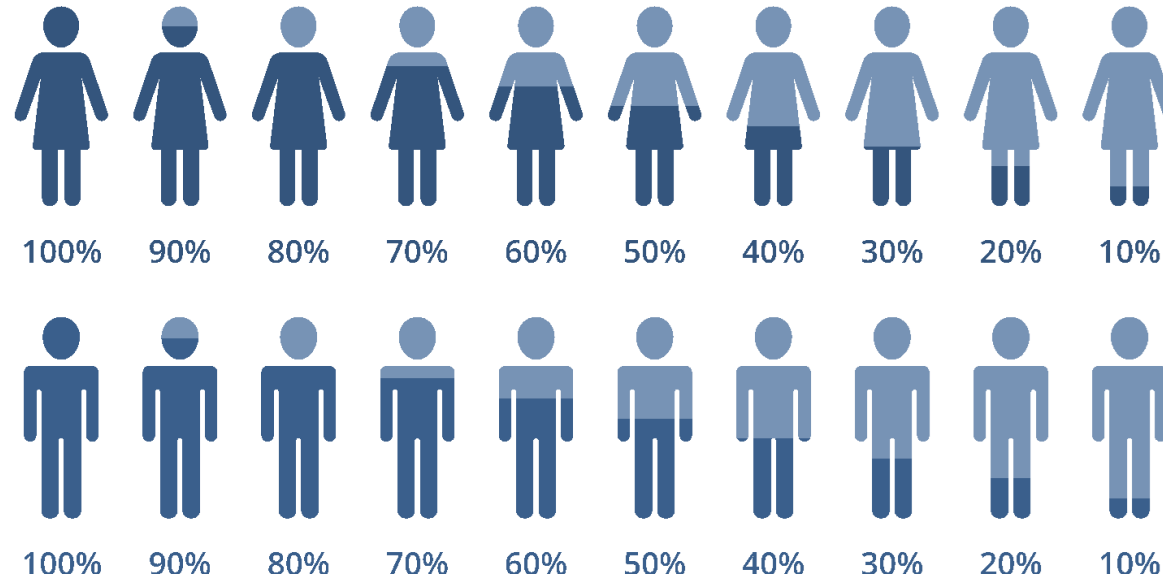
- **CRM** Summary Data
- **CRM** Gift Transaction Data
- **Experiential Data** (**Alumni**, **Clinical**, **Special Events**)
- **Wealth, Demographic and Consumer Data**
- **DYNAMIC-ML** Scoring
- **Social Media**
- **Disparate Algorithms**



Predictive AI

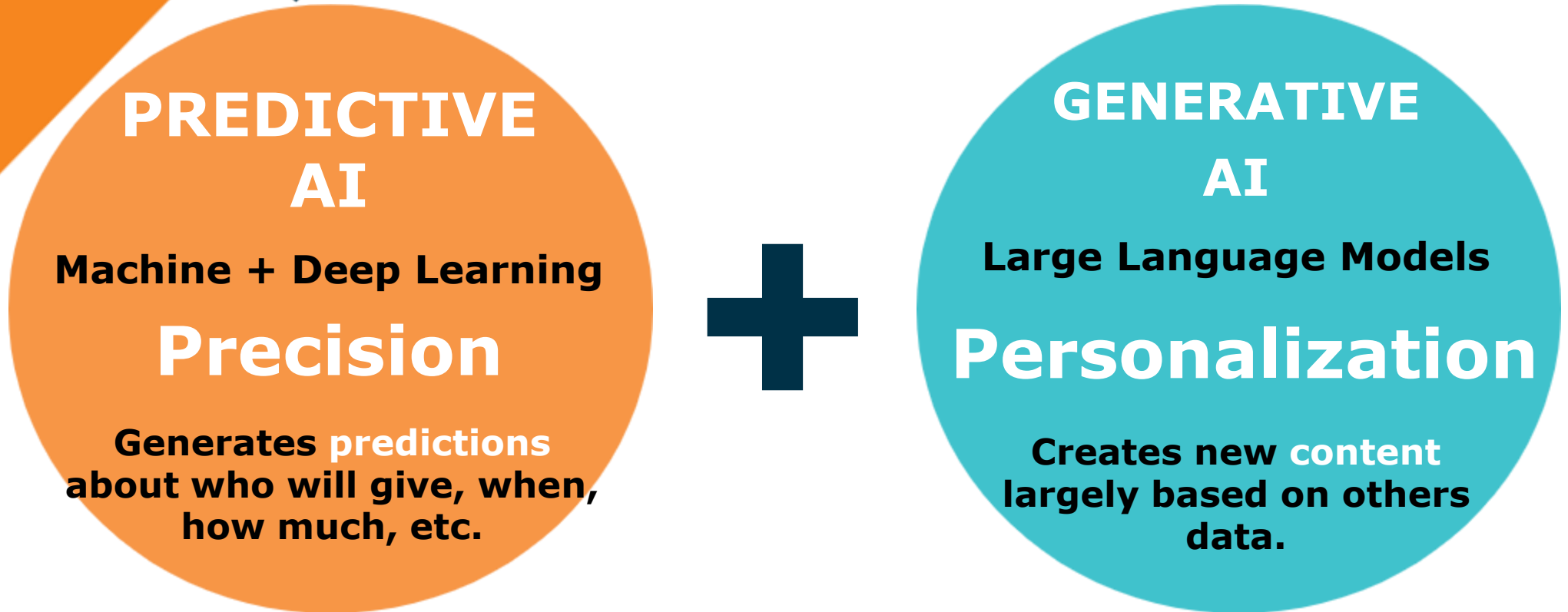
How has each person's connection or engagement changed over time? Each connection, and engagement is specific to that nonprofit.

Score is assigned based on the number of commonalities with alumni donors



All are re-scored regularly based on updates to their data


The Perfect Blend



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

Impact on Fundraising

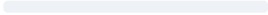
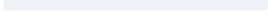
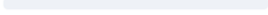
Home / Lawrence J Ellison



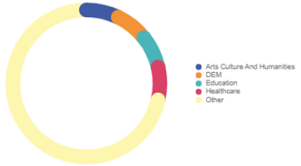
Lawrence J Ellison
2850 Broadway St
San Francisco, CA 94115

Client ID: 8205
Business Address: N/A
Seasonal Address: N/A
Spouse: Lawrence Investment Llc
Age: [Click to add](#)
Date of Birth: [Click to add](#)
Phone Number: [Click to add](#)
Email Address: [Click to add](#)

Engagement




RFM 
MLR 
DS AI 

Giving Snapshot




● Arts Culture And Humanities
● DEM
● Education
● Healthcare
● Other

Giving Rank

Charitable Giving 
Political Giving 
Real Estate 

Gift Likelihood





● Major Gift ● Annual Gift ● Planned Gift

Profile Quality

Medium
18 of 25 points

Suggested Ask

Based on Giving 
\$100,000,000+

Based on Wealth 
\$100 Million+

Charitable Giving 7 189

Political Giving 176 64

Crowdfunding by Donor Social 5

Wealth

Giving

Industry

Nonprofits

Relationships

Bio

Custom

Profile Options

Search Profile

Generative Reports

What would you like to include?

Suggestions based on your profile

Native Information

☒ Wealth ☒ Giving History ☒ Industry
☒ Non-Profits ☐ Connections ☐ Biography

Visual Information

☒ DS Score ☒ Engagement ☒ Giving Rank
☒ Giving Snapshot ☒ Gift Likelihood ☒ Suggested Ask

[Generate Report](#)

128 x 128

Lawrence J Ellison
Ceo

DS1-1

Contact Home Address 2850 Broadway St San Francisco, CA 94115 Business Address 0

Giving Percentile (USA)

Charitable Giving	99.9
Political Giving	99.9
Real Estate	99.9

Engagement

DSAI
RFM
MLR

Giving Snapshot

Gift Likelihood

● Major Gift
● Annual Gift
● Planned Gift

Suggested Ask

Based on Giving Based on Wealth
\$100,000,000+ \$100 Million+

Date: 03/21/2024
Prepared for:
Prepared by:
Prospect Manager:

Lawrence J Ellison, DonorSearch pg 1 of 2

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128 x 128

Lawrence J Ellison
Ceo

DS1-1

Lawrence J. Ellison, often known as Larry Ellison, is a prominent figure in both the technology and philanthropic landscapes. Born in San Francisco, California, he has had a long and successful career as a CEO, primarily recognized for his role as the CEO of Oracle Corporation. The well-known entrepreneur and business magnate have amassed significant wealth, with an estimated net worth of \$112 billion.

Elison's influence extends beyond the business world, as he has also made a significant impact in the philanthropic sphere. His philanthropic endeavors are channeled through The Larry Ellison Foundation, which operates with a focus on providing grants and contributions for various charitable causes. The foundation has supported numerous initiatives, and in a single year, it approved grants totaling \$1,902,500, and paid out \$35,698,431 to further its mission.

Furthermore, Elison's commitment to philanthropy goes beyond just financial contributions. He serves as a Director, President, and CEO of The Larry Ellison Foundation, showcasing a hands-on approach to his charitable efforts. The foundation's activities reflect Elison's dedication to making a meaningful difference in areas that align with his values.

In addition to his philanthropic engagements, Elison's wealth can be evidenced in his real estate holdings. One significant property of note is a residence in San Francisco, valued at approximately \$8,389,101. Moreover, his association with high-value business ventures, including Oracle Corporation, demonstrates the extensive expanse of his financial influence, with the company's business revenues totaling an impressive \$39,506,000,000.

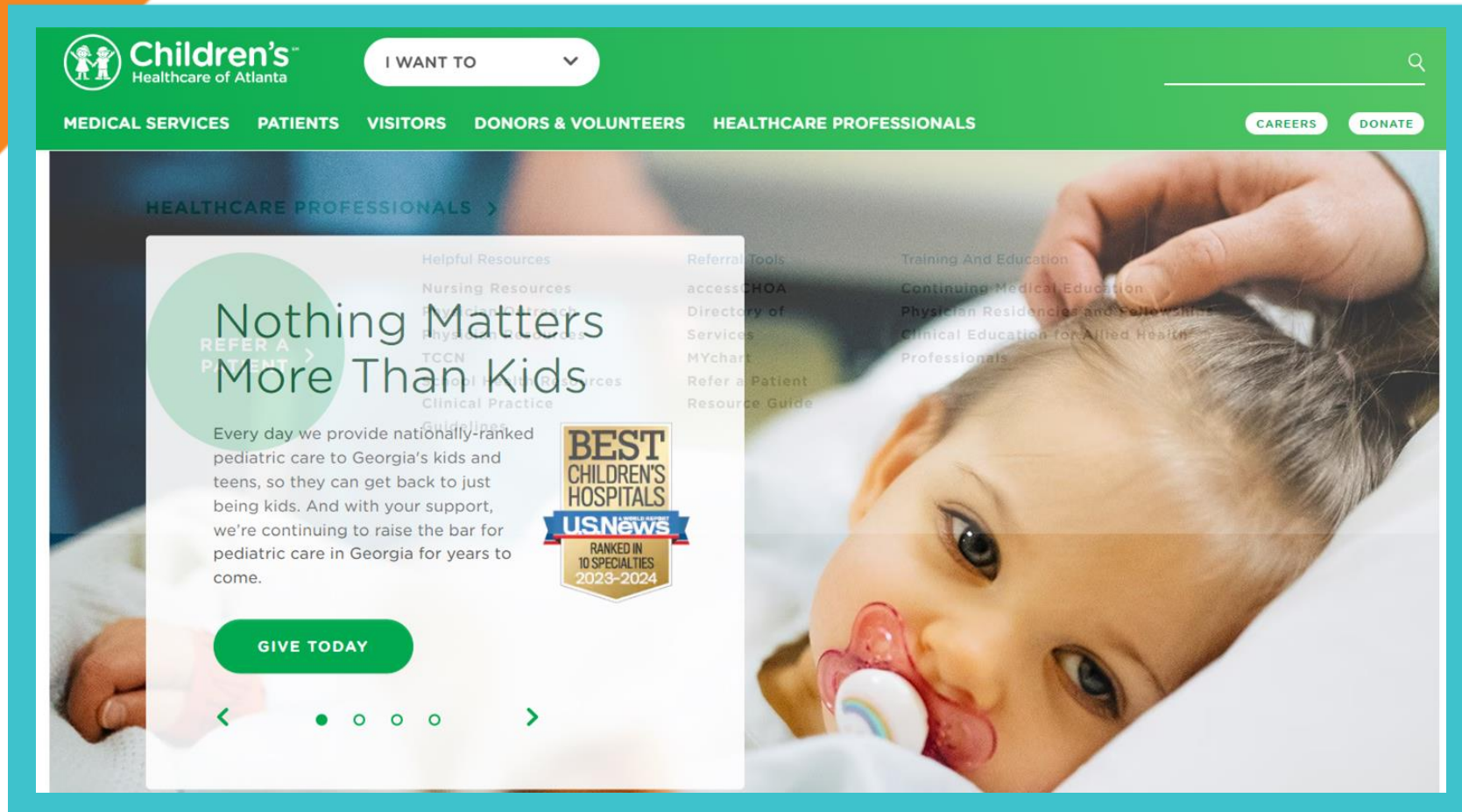
Elison's philanthropic and wealth profile depicts a multifaceted individual whose impact is felt not only in the tech industry but also in the realm of charitable giving and societal contributions. His significant financial resources and proactive involvement in philanthropy illustrate the depth of his commitment to leveraging his wealth for the betterment of society.

Lawrence J Ellison, DonorSearch pg 2 of 2



Real Stories: Integration of Traditional and Modern Models

Children's Healthcare of Atlanta





Who/What:

- **Children's Healthcare of Atlanta**, a leading pediatric healthcare provider, partnered with **DonorSearch AI (DSAi)** to enhance **their donor qualification process.**

How:

- By leveraging **Predictive AI** they were able to identify patient families with **major giving capacities of \$5 million or more.**
- One such donor, with a low clinical engagement but a **high DSAi score of 94** and a giving capacity of **\$100,000 or more**, was flagged and added to the Major Gifts Officer (MGO) portfolio.

Result:

- **Within two weeks**, this donor signed a gift agreement for **\$50,000**, demonstrating the success of the partnership between Children's Healthcare of Atlanta and DSAi.

Taylor University





Who/What:

- **Taylor University**, a faith-based liberal arts institution, was in the midst of a **\$500M capital campaign (the largest of any institution its size)** with limited resources.
- Their team needed a **smarter way to identify potential major donors already in their system without increasing staff hours.**
 - Traditional wealth screening wasn't surfacing enough actionable prospects in time.

How:

- Integrated **DonorSearch AI** to score and segment prospects **based on giving likelihood and behavioral signals.**
- Focused on **predictive scores** (not just wealth) to **reprioritize prospect portfolios** mid-campaign.
- Used internal data—**alumni, donor history, and engagement**—to surface hidden giving potential.


Result:

- Discovered **previously overlooked major gift prospects already in their CRM.**
- **Streamlined prospecting efforts**—helping fundraisers move from analysis to action faster.
- AI scoring allowed the team to **better allocate student caller hours to the highest-potential prospects.**
- DSAI helped identify the constituents most likely to make a gift by phone, which **improved pledge performance and saved time.**

Blue 13 Dance Company

BLUE13 DANCE COMPANY

REIMAGINE AMERICAN DANCE





UPCOMING

Classes, concerts, events, & more

[VIEW CALENDAR](#)





BOOKING

Concerts, commercial, & private events

[LEARN MORE](#)



Who/What:

- **Blue13 Dance Company**, faced a challenge in identifying high-potential donors within its community.
- Traditional fundraising tools had failed to uncover several major giving opportunities.

How:

- To address this, Blue13 leveraged MLR (AI driven RFM) **“Most Likely to Respond”** predictive scoring
- Able to **uncover previously overlooked prospects** who showed strong engagement patterns but didn’t surface in traditional wealth screenings.

Result:

- Raised **\$100,000 in just a few months.**
- **Accelerated** donor outreach and cultivation.
- They were able to **demonstrate that behavioral signals + AI insights can outperform legacy approaches.**

What Successful Organizations Have in Common

Shared Trait	What It Looks Like in Practice
Focused on Precision	They used AI scoring to uncover hidden major gift prospects missed by traditional methods.
Acted Quickly	Automated screening helped them move from analysis to action—in days, not weeks.
Prioritized Smarter, Not More	They didn't try to do everything—AI helped focus efforts where it mattered most.
Integrated Human + Machine Insight	AI provided the guidance, but fundraisers still built the relationships.
Personalized Their Outreach	Messaging was aligned with donor behavior, interests, and timing—not just wealth.
Scaled Strategically	Small teams amplified their impact by letting AI handle the heavy lifting behind the scenes.

The ROI of AI



- **Precision + Personalization**
- **Efficiency Boosts**
- **Increased Quality of Work**
- **Improved Work Satisfaction**



Next Steps...

Phone Number: (410) 670-7880

Email Address: info@donorsearch.net

Website: www.donorsearch.net

Ready to take your fundraising to the next level?

Let us show you how!

Scan the QR code to get access to DonorSearch to see how your organization can harness the power of AI for your fundraising.



**SCAN HERE TO BOOK
A DEMO!**