



Kerrin Mitchell:

Welcome to the Untapped Philanthropy Podcast.

Tim Sarrantonio:

We're your hosts, Fluxx's, co-founder Kerrin Mitchell, and Neon One's, Tim Sarrantonio. We've spent our career learning how to leverage technology and data in the social sector to better connect and serve our collective causes, constituents and communities.

Kerrin Mitchell:

In this podcast series, we profile leaders, public figures, philanthropists, and industry experts to explore the fascinating intersection of funding, technology, and policy. We're here to analyze the most formative topics and trends that shape the present and future of philanthropy. Tim, it is a final episode of the year.

Tim Sarrantonio:

Yeah, I mean, I've enjoyed our time, but what a weird year. What a weird year. What a very weird year.

Kerrin Mitchell:

Well, I mean here, obviously at Untapped, we really want to make sure we're capturing all the trends, the practices, the insights that have been gleaned from the year. Obviously 2024, strange year, but maybe we can summarize a couple of these heavy hitters for today as our final episode of the season. We're going to wrap it up with a bow.

Tim Sarrantonio:

Yeah, I'm excited because we're also going to give our listeners a tease of what's to come next year.

Kerrin Mitchell:

And it's exciting.

Tim Sarrantonio:

It's, it is. And look, there's a few things that we know that we've been trying to make sense of this year, but very, very likely what we're going to talk about today will help influence going into next year as well. So this is still topical regardless, right. And I just think that especially what we've wanted to talk about that kind of sums up a lot of the trends and things people are worried about or excited about too, I think that we should call out that there's joy, there is joy in the world.

Kerrin Mitchell:

Things to be positive about.

Tim Sarrantonio:

Things to be positive about. So Kerrin, where do you want to get into it? Because I know we're going to talk about things like AI and technology and community-centric fundraising and donor-centric fundraising, DAFs, advocacy, policy.

Kerrin Mitchell:



Politics?

Tim Sarrantonio:

Politics. Uh-oh.

Kerrin Mitchell:

We won't go too far into politics, but we do. I mean, when we talk about the big trends here, I do think AI, community funding, advocacy, these are things that are on people's mind and it would be silly not to acknowledge that these have a huge role right now. We talk about the world we're in and the role of philanthropy is to fill in gaps where maybe the public or government worlds can't fit. So what does that look like? And I think there's so many things that we can kind of dive in on that obviously were trends this year, but obviously are going to be massive trends next year. So it is a teaser as well as a summary. But maybe we start first up with the most obvious, if you will, captain an obvious topic of technology in this sort of generative AI. Maybe talk about where that is reshaping the public sector. Obviously we had a lot of conversations about it this year and there's a fair amount of nuance. So why don't we start with this sort of meta question that is actually a challenging one that I'm just pose to you, which is what is the actual impact of generative AI on philanthropy in 2024? So let's talk about that and then I want to talk about the idea of are these the jobs that we have now, will they be the jobs, the future? So let's focus on actual impact from 2024. Tim, what are your thoughts?

Tim Sarrantonio:

Obviously I have a lot. I think it's both transformative and overhyped at the same time. One, because I think we're over indexing on the reductive elements that generative AI in particular produces. I think that especially from my perspective in the individual giving world, we think about this very differently because the execution of it is slightly different too. Kerrin, you might have to have people worrying about grant narratives and are they taking things. Even one of the conversations that you had in 2023 helped me turn on to the fact that funders kind of didn't care because they were already expecting people were copying previous submissions that they did beforehand. So what's the big deal about something slightly coming up with the first draft? And I think what we haven't done and where we failed is to properly get to the heart of why this exists to save time. We focused on the magic and not the mundane.

Kerrin Mitchell:

Yes. And I think that's the big transition that I think of this, and we'll talk more about this, but this sort of mental model I think about around how AI will manifest. And I think we're in phase zero, which is people are piloting, they're experimenting, they're testing things out with without any cohesive strategy, and that's important. That's figuring out where people's muscles are, their aptitude, their interests, their biases, where are all these things sitting, but realistically, people are just coming together in philanthropy with a strategy of what does this look like? Like you said, what's the result of it? What we are the cost efficiencies or what is the innovation that's coming? I think people are just starting to get their arms around it. We are by very, I don't know. I don't know why we are this way, but we are oftentimes the laggard in the technology industry as an industry, we tend to just watch others and say, okay, that's where it worked. And these are, oh, this is summarization. It's worked really well in this industry. Let's take a look at it. So in that I think our pilots and experiments have been going on all year and we need to create a more cohesive strategy going forward.



Tim Sarrantonio:

I think it's been a while since we, and we've known each other for a long time too, and we've looked at, and we've looked at the landscape of changes. What I've always loved talking with you about Kerrin, and I hope our listeners appreciate this, is that there's not a lot of legitimate conversations, in my opinion between the grant side and what's happening on individual giving. I think that fundraisers are doing this all the time. Funders are doing this all the time, but the technology is not.

Kerrin Mitchell:

Community foundations are getting there too. But the actual distinct structures about where affiliation groups are and how they share information are completely separate.

Tim Sarrantonio:

I think the funder side and the foundation side and the conversations happening there are much more interesting than what I'm seeing on the individual giving side, especially when it comes to technology empowerment because we're still in the digital confetti zone. We're still in...

Kerrin Mitchell:

Well, there's no funding. I mean, this is part of the whole thing of, I don't know that people, when funders aren't funding technology capacity building, they're not going to be able to have the conversations that funders can have because they have the luxury of time and money on the funder side, whereas these poor nonprofits are just trying to keep their head above water and having a technology embracing.

Tim Sarrantonio:

And in the absence of that public private collaboration or that zone of discussions, I can make an argument definitely that fundraising AI on the individual giving side has been a nice space, but it still has a lot of work to go to ensure that a tech vendor, for instance, isn't taking advantage of people and manipulating the conversation to focus on things that ultimately are catastrophic for donor retention rates or any of these types of things. Now, I know we'll get into individual fundraising discussions a little bit later on in terms of fundraising philosophies, so we can put that off to the side, but I don't think there's been a technology that all of us have talked about in a very long time.

Kerrin Mitchell:

Well, I think that the challenge is aligning on AI across the industry means you're aligning on a shared purpose, you're aligning on shared data, you're aligning on shared collaboration, shared governance, and that's just not there yet. When you talk about a balanced approach, that's like kind of where you got to start. And so I mean, or not start, but that's the holy grail. You got to have those shared places of acknowledgement of existing. But I think what we can see is at least the opportunity with AI where even if you're just looking at your own household, and let's say I'm looking at it from grant making or even an organization, a foundation inside of the sphere, there's really a couple questions they can ask themselves that will, I think get us to this idea of aligning on AI and shared purpose, blah, blah, blah, all the, what does this look like for the industry, which I think people keep jumping to that question of how do we show up as philanthropy for actual change?

The problem is people haven't gone inward to say, okay, what do I think of AI and what's my cohesive strategy? And so I would share that, the conversation that I would ask people to have is really, I would



say it's twofold, but it's actually, there's three concepts to it. One is you should be looking at your own, actually, your board or whoever should be asking you the question of what are we able to take out of our budget as a result of AI? What are the cost efficiencies, the way we can do things better? And that justifies the AI investment that you are going to have to make because this isn't going to come free. Anything that's free again, is using your data and you as the currency. So you want to make sure you're making investments in AI and you need to basically understand that there are places where you're going to have automation.

The second is what are the economies of scale that you get from it? If I'm building to your point, the ability to have generation of content or marketing or whatever, is that going to grow? How can I make sure that my same inputs for marketing create me 10 times the number of leads for my future funding? So economies of scale and innovation, what can that do for the AI? And then obviously what's the ethical framework around it? So it's cost savings, innovation, ethical contributions. This is how AI can help. And I think starting with that gives us the ability to kind of get to a place where we can say, okay, now as an industry, what do we think about it? But I think people could keep jumping to the industry and then they get stuck to your point of, should we, should we not? And you're never going to get anywhere with that.

Tim Sarrantonio:

I think it's because people struggle with this because it connects to the other item that you brought up, which is how is this going to impact jobs like the employment? And here's a question, Kerrin, I'm going to pose this to you.

Kerrin Mitchell:

Yes, dear.

Tim Sarrantonio:

And I'm also going to pose it to our listeners as well to reflect on how many fundraisers are there in the United States today?

Kerrin Mitchell:

Oh, I have no idea. Fundraisers? I don't know.

Tim Sarrantonio:

The people who are aiming to acquire philanthropic funds from wherever.

Kerrin Mitchell:

I mean, you'll know the answer to that. I'm going to pass.

Tim Sarrantonio:

You're going to pass? Guess what? Everybody's passing. I've had conversations with, I've posed this question to people like Woodrow at Giving Tuesday and AFP and Giving Institute people and all of these different folks. We can't settle. We have some ideas. And AFP specifically, Lori Gusdorf at the foundation had a really decent review of this, but we don't have a formal number. And the reason that question is important is because it explicitly gets to the heart of what you're talking about. Because if we can't appreciate the labor infrastructure that we have now, then how do we know what we're actually losing.



And so one, we since the pandemic, have not, I think we've lost a significant amount of jobs in the nonprofit sector that have not been brought back since the pandemic. There's a lot of program staff. There is, National Council of Nonprofits has done extensive surveys on the labor force. If you're looking for best labor data, yes, Bureau of Labor Statistics is fine, but I would make a case go look at what your state association is doing. They have a much better pulse on the labor market in your individual state,

Kerrin Mitchell:

And are you contesting that in the change from Covid? And then do you think AI will change that, layout?

Tim Sarrantonio:

What I concerned about, what I am concerned about, and not necessarily this is a, I'm not even at canary in the coal mine standpoint here. I want to make that very clear. I want to pose the question. The concern I have is leadership who inherently doesn't understand what the staff that makes the door stay open. And we can extend this out because this does get into some of the ways that we think about fundraising philosophically, program staff, fundraising staff, volunteers. We're at a volunteer crisis in our country when it comes to that. And a lot of these on volunteering and strong philanthropic rates. If we look at the Generosity Commission report that just came out, if we look at the Do Good Institute data that's actually been released, those two things, donation rates and volunteerism are explicitly connected also to civic society strength. The strength of democracy also had correlation.

Kerrin Mitchell:

Which is the idea of how do we untap philanthropy and all that good stuff that we like to talk about. Okay.

Tim Sarrantonio:

So if we've lost all these jobs and leadership is like, why is money not coming in? Well just replace it with robots. That's the wrong lesson. That's the main thing I want to stress. If you are an executive, a C-suite person, and you're thinking AI is going to save your financial woes, you are wrong. And that's not how we should think about it. It is a catalyst, it's a tool. It can unlock, unlock, right? It's a tool and you can think of it as part of your team, but it is not above, below, whatever. If we stop creating the hierarchies on some of these conversations, I think that's where we can actually untap the philanthropy. So thanks for posing that one. What do you think when you hear all that stuff?

Kerrin Mitchell:

I mean, I think the people, there was an interview that Fei Fei Li did. She's at the Stanford Human Centered AI Center.

Tim Sarrantonio:

We're going to have some wild show notes for this one too.

Kerrin Mitchell:

Oh my God. All over the place.

Tim Sarrantonio:



Run through Chat GPT and just ask it to find the source.

Kerrin Mitchell:

Yeah, go pull her up everyone. But she is, okay, fascinating, she has a new book coming out, fricking I cannot wait. But she brings forward the idea of AI and everyone's like, is it the nuke that sort of takes out all the jobs? And I mean, to be honest, there is a question of humanity and all the things that come of what's going to happen with AI. And her point is that AI is actually more like electricity, how you use it, what you do with it. Yes, you can get electrocuted, but realistically too, there are aspects of this that it's channeling it for all the, it's almost like by putting the connotation of it around negative concepts of what it could do to humanity is taking away the real power of the tool of electricity or of AI. And I think that's the thing that people have to reframe.

So when you talk about it in terms of like I was saying, analyzing your own business cost efficiencies, what can I save by basically automating X, Y, and Z things, or what can I do with this that's going to innovate the way that I look at getting my work done so I can do 20 to one instead of one-to-one on my returns? I get back that output. I think that's the thing. People have to rebrand it and then ask the question of where is it going to help them instead of just basically getting stuck in what it can't do, because you're going to circle and circle around that forever. I do think that there's a paralysis in our industry, especially around for sure, very concerns about ethics and bias and all that, but oh my gosh, by not using this, you're going to fall further behind.

That's the stupidest statement because everyone knows that to be true. But I think that's the problem that I'm seeing in that we have a risk averse organization pool of folks that just are in paralysis mode. And I do think it will be the gap between those using and those not using is going to be huge. So my suggestion to everyone is not only look at yourselves internally, but fund the crap out of this for your nonprofits. And that would be the most important thing you can do because if your nonprofits aren't getting the technology money that they need to be able to move forward, the gap is going to leave them behind. And that I believe is a very real going concern for me.

Tim Sarrantonio:

Well, and that's an aggregate of all technology, AI definitely being kind of the cherry on the top there, right?

Kerrin Mitchell:

And it's going to accelerate the same way electricity accelerated certain things that exist. This is an acceleration point, and I do not want to see nonprofits left behind because they weren't funded.

Tim Sarrantonio:

I liked how Mina Doss of Namaste Data framed like this,

Kerrin Mitchell:

I love Mina.

Tim Sarrantonio:

Love Mina. Love Mina. There's a reason why we invited her to be on the FEP sub.

Kerrin Mitchell:



Can we have her next year. Let's have her next year.

Tim Sarrantonio:

Yeah, we can have her.

Kerrin Mitchell:

We haven't had her yet.

Tim Sarrantonio:

So she framed it like this, that things like this, think of it like a train. The train will keep coming around, but might miss that train when it comes by, right? You're just going to catch it at a later time. I think that we can design an infrastructure where people are ready to get on, and we just make it easier for them to get on and that they know where the direction is going and that they can also feel free to invite other people to be part of it, right? I think a lot of times, especially when I've seen things put on very, very large for-profit technology companies around this, and they try to appeal and think what the typical average nonprofit practitioner is experiencing, they get it wrong.

Kerrin Mitchell:

Yeah.

Tim Sarrantonio:

Get it wrong because they have designed a perception that enshrines how the 3% of nonprofits making over 5 million dollars operate. And the reality is, is that 97% are making under 5 million, 92% are making under 1 million.

Kerrin Mitchell:

You're such a fact guy. I love it. How do you remember all these facts? So smart.

Tim Sarrantonio:

I just have some things that I've internalized deeply. But do I forget my children's birthday sometimes? Depends.

Kerrin Mitchell:

Two of them have the same birthday.

Tim Sarrantonio:

That makes it easier. But there's three kids. It's January 18th and July 1st.

Kerrin Mitchell:

Oh my gosh. That's my mom's birthday. Yay.

Tim Sarrantonio:

Oh, okay. Pepper has that. Yay. And I joke, I joke.



Kerrin Mitchell:

I know you don't. Okay,

Tim Sarrantonio:

Well, what else we got other trends?

Kerrin Mitchell:

Anything else on AI? Because I do feel like we, no, I'm you and I could speak on this forever.

Tim Sarrantonio:

I think for everybody, We could stop talking about AI.

Kerrin Mitchell:

So the summary is, the summary to everyone is we spent 2024 in a pilot and experiment phase. You all, we all, need to be looking internally to the phase one, whatever you want to call it, which is what can we take out of the budget as a result of AI? What economies of scale can we get from it? And then look at that to say, obviously, is that ethical? Is it something we want to be able to see everyone benefit from? And then at the end of the day, having that ability to understand what your take on AI is helps you to build a shared environment for the larger sphere, ecosphere, ecosystem.

Tim Sarrantonio:

Good summary.

Kerrin Mitchell:

And fun technology. Would you say those are the summary points?

Tim Sarrantonio:

Yeah. Yeah, I think that's good. AI will help us summarize that.

Kerrin Mitchell:

AI will help.

Tim Sarrantonio:

That's why I don't worry about it.

Kerrin Mitchell:

Summarize that Perplexity. Alright.

Tim Sarrantonio:

I mean a lot of this does lead into the people side, right? That's the important.

Kerrin Mitchell:

So let's go there next.



Tim Sarrantonio:

Yep. What do you want to unpack?

Kerrin Mitchell:

Well, so the next part I would say is 2024 in our part two of this lovely podcast episode that you can see is so well scripted. We have a lot of things that were happening around the role of donors, the role of DAFs, if you will, community centered fundraising, the role of wealth transfer. All of these things are changing, new generations are coming into a place they might have different values and approaches than the previous older generations. Can we look at all these? What are the methods that you're seeing? And I actually just want to listen. I don't have a big take on this because as you know, I'm on this sort more grant making side. I'd love to hear a bit about what you saw this year around all the methods that sort of co-exist around fundraising, and then do you see a change occurring because of this wealth transfer?

Tim Sarrantonio:

So one, I want to make sure we connect it back also to some of the episodes that we had earlier this year. And I think a good one for people to listen to that connect to this conversation. I think Genevieve Smith was an excellent conversation that kind of pertains to this. Roland. Roland's conversation.

Kerrin Mitchell:

Yeah, totally. Both those.

Tim Sarrantonio:

And lot of it. So I want to put a big red caveat on, as a White guy, there is some problematic elements for me speaking on behalf of something like community centric fundraising. So what I'm going to do is speak more from my observation on people who are talking about this. And so again, in full disclosure, Neon One, the company I work for, we work with several folks who are both, we have a deep relationship with AFP Global and Foundation through the Fundraising Effectiveness project. A lot of people love talking about donor-centric fundraising there. But then also we've started working with the AFP Greater Toronto chapter, which had a big kind of like if you want Mide, we talk with Mide. So if you want to go back, there's your episode if you want to understand what we're talking about here.

Kerrin Mitchell:

Look at you bringing it back to all our wonderful episodes.

Tim Sarrantonio:

Well, that's kind of the point of a recap episode. I know.

Kerrin Mitchell:

It's far too intelligent.

Tim Sarrantonio:

So Mide was a good episode if you kind of want to get to what the heart I'm talking about about, we've had Michelle Murray, who's one of the folks who helped kickstart that. I had the pleasure of hanging out on a bus to a restaurant with Vu Le and then sitting down with Vu Le and talking to Vu Le for a good



hour. And that was just in October. So I know a lot of the folks there, and especially I would say my favorite articulation for this is from Rachel D'Souza. She's with Gladiator Consulting, she's out of St. Louis. Again, full disclosure, she's a member of the Neon One Strategic Advisory Council. And part of the reason we invited her on is because she has this great take and ultimately one, if people are wondering, well, okay, I hear about donor-centric fundraising and I hear about community-centric fundraising, what does that even mean?

Here's the too long didn't read. And Kerrin, you can kind of be the avatar for the audience to ask further questions. And we can limit this to maybe 10 minutes tops because I want to get into our other topic, but donor-centric fundraising as a term comes from Penelope Burke. She wrote a fantastic book on this. She used to do a lot of surveys where she would literally survey donors to get their understanding of what they'll respond to. It's generally a very tactically focused approach to what will make people feel special and stewarded through the individual giving process. Now, the individual giving represents, according to Giving USA, about 69% of all giving.

So if we include foundations, bequests and corporate money. Corporate money being the most distracting thing in the sector, in my opinion, that generally it's people writing checks. It's old ladies giving money. If you're listening to this, especially let's say you're listening to this when it's December 31st or something, 12% of all individual gifts come in on December 31st. Just a lot of people donating online, a lot of people sending in their end of the year checks because they've backed it up and they've said, I am going to give then. So this is where the wealth transfer obviously starts to impact things too. So you have the larger macroeconomic situation there. And so what we're seeing, and if we look at fundraising effectiveness project data, which my personal win, Kerrin and I want to hear yours by the end of the episode, my personal win outside of this show, this is a win, is being on this show. In my opinion, I became chair of the Fundraising Effectiveness Project.

Kerrin Mitchell:

I love that you have such a noble thing. I was thinking in terms of my focaccia, but that's fine. We can go with that.

Tim Sarrantonio:

Look, I'm thrilled about the Lego sets I completed this year too. So that Pacman was a real beast.

Kerrin Mitchell:

Yes.

Tim Sarrantonio:

So to get to cut to the chase, community centric fundraising came out mainly as a critique of wealth inequality and to generally say we are over indexing on affluent rich donors driving the direction of our philanthropy. So if you want a concrete example, look at things that may have happened around we're taking a statue down or we're renaming something at a college and it's in Texas or the South or something like that. This also happens in the North folks. Let's make it clear that this isn't a South North thing by any means, that these problems of inequality and social and racial strife are everywhere because it's America, because it's the world because people are complicated. And that's the thing that's very important here. Donor-centric fundraising just simply is a way to think about engagement in a way that effectively cultivates that. And people, Rachel D'Souza talked about, you can send a handwritten note to somebody.



It doesn't mean that you are framing a hierarchical structure for donors or something like that. It's okay to write somebody a note. What you don't want to do is to say, now you're running the show, now you're dictating how things work. Now we're going to just put ourselves in uncomfortable situations as an individual fundraiser because this person with power has the money. That's ultimately kind of the core critique there. She has a fantastic episode on Mallory Erickson's podcast that is also another guest that we had. So I think that this is one that, especially if it's new to you, that Rachel's episode on Mallory's What the Fundraising, is a really good primer on all of this way better than me because she's actually been part of the movement. But at the end of the day, it's not an either or. You can build a beautiful community of generosity while still acknowledging even alongside your donors that wealthy inequality is a very problematic thing that is hurting our sector.

Kerrin Mitchell:

Would you say that with the younger generations coming in, that, I mean, you mentioned, sorry, my brain's stuck on the personalized engagement stuff because so against the grain of AI and all that, but at the same point, I also would contend that probably the younger generations like that, I mean there is sort of a diversification the way that they want to build those relationships with a broader base and things like that. Are you seeing that change? Are you seeing, again, for some reason my brain got stuck on that level of engagement and wondering, with the generation coming in, the balance of all the technology they have, but also that desire to connect a bit more? I don't know on that. What do you see?

Tim Sarrantonio:

My obviously agenda driven take because of just where I work.

Kerrin Mitchell:

No, totally. The personalized engagement I think is just such an thing.

Tim Sarrantonio:

Well, I think the text spill wrong.

Kerrin Mitchell:

At the same time as AI, and that's the part my brain got stuck on. And weird thing you said after that.

Tim Sarrantonio:

It's my podcast with you and I'm just thinking and talking and stuff like that. I can speak. I'm going to speak from the heart here.

Kerrin Mitchell:

Yeah, no, this is your opinion.

Tim Sarrantonio:

This is my opinion, not the opinion of blah blah, blah.

Kerrin Mitchell:

No. Another one of us are repping to say this is the broad Fluxx or broad Neon opinions.



Tim Sarrantonio:

If I look back on the history of technology in our sector, I think we got the wrong lesson out of the success of Blackbaud in 1981, founding a system that helped manage. Because that's where Blackbaud started, 1981 private school in Manhattan founded to manage the finances better. And that core ended up growing into what we know as Razor's Edge, Financial Edge, all of that flagship technology. And it was ultimately about managing dollars and cents. It didn't have anything at its core other than that's in that person's name. It wasn't a relationship system that didn't exist in the 80's. And so where we've gotten the wrong lesson is everybody's trying to build a better mouse trap on something that, in my opinion, isn't catching mice.

Kerrin Mitchell:

I agree. Well, I mean that's the whole concept of what's the actual data impact? And that's where you're aligning on government. It's built a whole industry, to be honest, and my company included, that I believe has to transfer and start to transition into that realm of what is the actual value. And the great news is I think the great equalizer is data and the ability for us to come in and sort of say it's not having data, which is what I think Blackbaud did. It just said, you now have data. It's about how to utilize it, what to do with it, what does it tell you? How do you action on it? So I think that's the big transition that anybody who's still planning the grants management space has to rise to be bigger and play, like you said, evolve from the Blackbaud of 1981.

Tim Sarrantonio:

And what I will say is that there's more of an interest. I would not be surprised based off of the chatter that I am hearing, that the big thing coming out of the Generosity Commission report is, okay, but what do we do about this? And technology is a part of that, but okay, love your immediate reaction there. So expand on that, your thoughts when you hear, let's have a national conversation on this.

Kerrin Mitchell:

I mean, I think when you talk about the role of tech, it is going to facilitate pattern finding. And I think people just don't know what to ask of it because they're so stuck in the way they used to formulaically download and then pull through. But the reality is, the beautiful part is that you can now go in and it can be the data analyst that says, take all of these grants, not just like the tallest with the most successful one was or whatever, where, what are the risks of these? Where are the biggest risks or the biggest challenges that we're facing, and how do we help them? And so instead of it being something that says, don't fund this, and people are looking at it to recommend, but the truth is, it's best at its best. It's finding patterns that we can't see within ourselves and creating ways to lift those up so that we can help solve them. So the technology is always meant to solve human problems. It's not meant to recommend a solution that says you have to do it this way. And I think that's where people fail when they say is technology at a place where it can do this. And I think that's the part I'm most excited about. I realize we were talking about generational wealth and transfer, and now I'm back on AI, so apologies.

Tim Sarrantonio:

Well, it hacks your brain.

Kerrin Mitchell:

Yeah, I think.



Tim Sarrantonio:

Well, no, but I get what you're saying. It's because people are involved. Wouldn't life be easier without people? And that's the joke. But the reality is, is that it's beautiful because it's messy. And I think that AI in its hilarious way, actually helps us.

Kerrin Mitchell:

Right? It's a catalyst.

Tim Sarrantonio:

We can think differently now, I think more easily.

Kerrin Mitchell:

But I mean, it doesn't take away the fact that there are still ways that you have to show up. And this is the part AI actually, this actually leads nicely into our third topic, not that we're done with the other one, but the idea that it can solve and it can lift up trends and it can give ways to be able to look at data that we may not see ourselves or that it might help us think through things two or three steps beyond where we currently are. And that's all very exciting and interesting. But the reality is it's also going to come in where there's ways to resolve things in the case of private money. And then there are things that are systemic that are obviously ways where advocacy and other things pop in. And I think that's the other thing that we have to realize is that as we look at technology or as we look at all these untapping of philanthropy, whether it's through, like you said, community funding or donor funding, whatever, there is an element of systemic change that has to occur that politics aside sits in the public sphere.

So I don't know, that's sort of the third trend that I would also say we're now conflating them all together because that's where we're at in the world. But that I think is the biggest thing that when we look at the third leg of success without advocacy, systemic change doesn't necessarily, it can't occur. You can't change poverty overnight without addressing the symptomatic issue of why it's occurring and change that underlying issue.

Tim Sarrantonio:

And no, it's all connected because think about it. You have the technology that can help manage or hinder these types of things. You have to have a philosophy on how you're even building this. But all of this can be upended with a flick of a pen in Washington or

Kerrin Mitchell:

A little HB 95, 94.

Tim Sarrantonio:

95, 94, and all that type of stuff. And that's why I've been thrilled for fundraising effectiveness project. So I'd love to maybe next year we dive a little bit more into.

Kerrin Mitchell:

Yeah, I mean, this is probably going to be a great topic to do in more.

Tim Sarrantonio:



It is, because we've added a governance subcommittee to assess where this individual giving data can help inform legislators. They ask about it all the time. And so we're even having Shannon McCracken. Yeah, so she's our subcommittee chair.

Kerrin Mitchell:

Killer.

Tim Sarrantonio:

And so I'm going to go to lobby days with her and stuff like that. Right. This is cool.

Kerrin Mitchell:

My God, you're living your best life, Tim.

Tim Sarrantonio:

I'm excited. I, I've put a prep personal development goal on government policy.

Kerrin Mitchell:

I mean, I think it's important though, because again, affiliations aside, that is the biggest part about how to make sure that we're bringing forward a sustainable structure. So that's awesome. I really look forward. I hope we have Shannon on next season. I know we've talked about it.

Tim Sarrantonio:

Yeah.

Kerrin Mitchell:

I know we've talked about it, but we need to her down.

Tim Sarrantonio:

I think I'd be able to reach her.

Kerrin Mitchell:

Yeah, maybe when you get on the call with her.

Tim Sarrantonio:

When I go to Washington, potentially in January.

Kerrin Mitchell:

So my thought is we want to dive into that.

Tim Sarrantonio:

Well, what are you seeing? How are funders viewing 2025 in the next two years, four years, especially in the wake of the election, for instance?

Kerrin Mitchell:



I mean, the reality is that, again, I said it earlier, data is the great equalizer here. So regardless of affiliation, I think we represent not just funders, but we do have a fair number of large nonprofits who are the very ones that could be at risk as people in whatever, again, political affiliation you have are contesting that there might be, oh, well, this is a pro democratic blah, blah, blah arm of this thing that we don't agree with. So I think what's interesting is that as we look at those, and as someone that has clients on both sides of the political spectrum, we look at the ability to say, this is a call to technology, honestly, to help bring greater transparency to those data insights we were just talking about. It's the only thing that as we come forward and say, this is what we do, this is how effective we are, this is the impact we had.

This is what we did not do, and this is why we didn't do it. There's a data role that has to be part of the storytelling to make sure that they're not all stuck in anecdotal stories or fake news or whatever you want to call it. And I think that's the part that we see sort of technology rising into a place where it can really help. So in the implications to a more politically charged and environment, I think the ability for us to recognize that we do have folks that have a risk because of their political affiliation, their funding sources or geographic heat map. Wherever they are, there are people and as are your clients that are going to be aware of this. So how do we enhance strategies? How do we open up, when we talk about alignment on that data impact, how do we create, we talked about this unlikely partnerships, and we'll talk a ton about this next year, which is how do we innovate and build new ways of thinking around some of the ways that we know people need to come together?

And maybe it's something where, again, it is a data impact push, but we get to sort of double down on that equalizer and stabilizer of data to make sure that they have the analytics they need to tell their story so that they are aware of what they're doing, what they're not doing, and make them aware of any biases that maybe, honestly, that they may or may not see or whatever it is. But this is a tool for them to be able to utilize to sort of basically build some leadership for them to tell their own story and not have others assume their story is what, you know.

Tim Sarrantonio:

I have deep faith. If we invest our energy, our time, and our resources into data collaboratives, data research initiatives with transparency that are not funded by private actors alone who do not represent the future of the sector, the positive future of the sector. I have faith, and I think that we're seeing this in many different areas. I have my own little support network and that, but this is the beauty of our show, Kerrin. So keeping an eye on the time, I mean, people are, it's probably busy regardless of when they're listening to this, right? Something might be burning in the oven. There might be a kid who needs to get back to school, who knows what you're experiencing. What can we end on in a positive note? Because other than AI might kill us, everything's inequitable and our government is a hellscape.

Kerrin Mitchell:

I think we were positive. I think we were beautiful.

Tim Sarrantonio:

I'm being facetious,.

Kerrin Mitchell:

We're rebranding it to be electricity. We're saying there are so many things you can do with AI. And by the way, you need to understand it. You need to know what your take is on it. You need to not stick your



finger into the electrical socket. You need to figure out the right things and how to use it in a way that is constructive to build.

Tim Sarrantonio:

So how are we going to educate people on this next year? And what's some gratitude we can end on? Because we've done that last year.

Kerrin Mitchell:

I think with 2025 onward and upward, we're looking at it as an opportunity for us to basically say, what does untapping philanthropy really mean? And I think shockingly, Tim and I have put a lot of forethought into the messaging arc of what we think would be really powerful. And that's talking about some of these alternatives. It's talking about how to protect your people, how to build structures to support essentially those institutions that whether they be your affiliation groups or structures or community. But we're going to bring a couple really cool speakers in, and we are excited to line that up for you. Obviously we can't start the new year without a little bit of fun around guessing what the world could be. So I think looking forward, we do have our friend Trista Harris coming back and Trista is going to be our...

Tim Sarrantonio:

I like that It's something to look forward to in the future.

Kerrin Mitchell:

She is impossibly positive and what's wonderful as a philanthropy futurist, and she's one of the only ones I know out there doing that. She's looking at the trends and not saying, oh, the possibilities are endless. She's like, there are four or five probable places we'll land. Let's talk about those. So we're going to hear a little bit about her insights, the trends, the industry, the predictions, all those good things. She's an incredible asset to the community, but also someone we've had in the podcast before. So we've just decided whether she likes it or not. She's coming on every January to do a little trend setting, but we also have our 50th anniversary, or 50th anniversary, our 50th episode.

Tim Sarrantonio:

50th. Oh, yes.

Kerrin Mitchell:

Yeah.

Tim Sarrantonio:

It's not my 50th episode.

Kerrin Mitchell:

No, but I mean,

Tim Sarrantonio:

You had a world before me.



Kerrin Mitchell:

I mean, it was like 12 episodes before you, but Oh,

Tim Sarrantonio:

Well, okay. I'll claim it.

Kerrin Mitchell:

You claim it. Just claim it.

Tim Sarrantonio:

It was just leading up to me.

Kerrin Mitchell:

But I do think all of those are really exciting. So we're excited to kick off New Year with Trista going right into our 50th episode, talking about what it takes to untap philanthropy.

Tim Sarrantonio:

But there's one important thing, Kerrin.

Kerrin Mitchell:

Yeah.

Tim Sarrantonio:

How can we make all of this magic happen? Who can we thank for that?

Kerrin Mitchell:

Oh, you're so kind. Thank Shawn. First.

Tim Sarrantonio:

I would love for folks, always, you might even hear Shawn referenced, Shawn, can you come on please for our final few moments here? You need to get us off the time correctly anyway.

Kerrin Mitchell:

Shawn Garrison!

Tim Sarrantonio:

Shawn Garrison, can you introduce yourself to our audience if people are not aware who you are.

Shawn Garrison:

Alright. Alright. Hello everybody. Shawn Garrison here. Just hit my eight years with Fluxx. Super excited. I run our customer marketing and our super vibrant community. And yeah, speaking of gratitude, I just want to thank you both for allowing me to kind of be the silent observer in the back of all these awesome and engaging conversations that you have. I'm thoroughly impressed by your Rolodex of



guests that you bring on, and I feel like just smarter every time that I listen to one of these episodes. And I have the pleasure of going back and marking all the edits and packaging it together so I've become very intimate with both your voices. But it's a joy to listen to you both and listen to the guests. It's great. Some of the things that the guests and you all have talked about, I've brought up in different dinner conversations I've had with friends. And it's great because I can spark the conversation and watch it unfold and just sit back and be like, I did this because of you.

Tim Sarrantonio:

Especially if you go into the deeper understanding of what untapped is, right? And then you get to it.

Kerrin Mitchell:

It's good verb.

Tim Sarrantonio:

Yeah. So what happens?

Kerrin Mitchell:

Is it an adjective? No untapped is a verb.

Tim Sarrantonio:

Yeah. It's untapped philanthropy.

Kerrin Mitchell:

Yeah.

Tim Sarrantonio:

Where does that lead to? And especially if you kind of end up uncorking things. Untapping things, right? Like that type of stuff. Ripple effects if you're just pouring into a bowl or a glass or something like that. And so getting to that deeper element, I think that's what I'm excited about next year. I'm really kind of dialed into the concept of movements. That's kind of like my organizational word for next year. And what's yours? Each of you? Let's end on that. Mine's movements. How are you going to organize mentally next year?

Kerrin Mitchell:

Oh man, that's a heavy question. In a good way.

Tim Sarrantonio:

We will debut that in 2025.

Kerrin Mitchell:

Only because I haven't had enough coffee, shockingly, I know it doesn't sound that way, but.

Shawn Garrison:

I think it's a good teaser too.



Kerrin Mitchell:

It's a good teaser mind. I'm going to hold the audience captive.

Tim Sarrantonio:

Tune in .

And you know what Shawn, build that in to. We want to hear your in intentional word.

Kerrin Mitchell:

Let's have an intention, a New Year's intention.

Tim Sarrantonio:

Let's have an intention. Submit it. Submit it in advance. We will figure this out in the show notes or a way to do this where comment on the post or something like that, and we'll reward you. We'll reward people who do this type of thing.

Kerrin Mitchell:

Well, on that note, speaking of everyone else, I did want to, well, okay, so Shawn, yeah,

Tim Sarrantonio:

Let's do some gratitude.

Kerrin Mitchell:

Shawn, I value you. I love you. You're the best. I appreciate you. Thank you so much. All the things, Shawn and I get to work a ton together, so I always enjoy this anyway, I'm lucky. But on that note though, I do want to obviously express our gratitude, our heartfelt gratitude, really to the listeners, you guys, your support, your engagement, your enthusiasm. It means a lot. We wouldn't be here without you, so we thank you for being a part of our little journey. We can't wait for next year. Tim, what gratitude do you want? Oh, and I also appreciate you, Tim.

Tim Sarrantonio:

I appreciate you.

Kerrin Mitchell:

To the moon and back.

Tim Sarrantonio:

To the moon and back. You're an outlet for stuff that day to day. I love my job, but I don't get to sit back and think deeply like this sometimes. Right? No offense.

Kerrin Mitchell:

Yeah, no, it's nice.

Tim Sarrantonio:



It's a nice, the philosophy is needed sometimes because that's the point, is the point is to be creative and think we don't want to just wake up in the morning. Marcus Aurelius talked about that, right? We do not exist to lay in bed.

Kerrin Mitchell:

There you go.

Tim Sarrantonio:

And so folks, we do not exist to lay in bed, so how are you going to get up and kick some ass in 2025? We can't wait to explore that with you next year.

Kerrin Mitchell:

Indeed. Biggest hugs, warm wishes for the holidays, and cheers. From our home to your home. You can listen and download our episodes at Apple Podcasts, Stitcher, Spotify, and of course directly from our website at fluxx.io. That's F L U X X dot io.