



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 Sarrantonio:

This episode is going to be a treat. We're excited to have Woodrow Rosenbaum, Chief Data Officer for Giving Tuesday join us today. Woodrow has been instrumental in shaping the Giving Tuesday movement globally, and has led groundbreaking research and analysis of individual giving behaviors. Woodrow's experience in the for-profit sector, elevating giving behaviors, has greatly impacted the way he approaches consumer strategies. He's learned how to move markets from passive participants to active and vocal ambassadors. A lens he brings for all his strategic work. He has a long history of leading significant growth in top consumer brands by defining strategies, developing innovative business routes and expanding markets. And Woodrow, to get off your beautiful bio that I just read, into Brass Tax, you are also one of my favorite people in the world, so I'm very happy to have you here today.

Kerrin Mitchell:

Hi Woodrow!

Woodrow Rosenbaum:

I'm very happy to be here, Tim. That is really quite flattering because I have a huge amount of respect for you and you've been such a great friend both to the movement and to me personally. So I'm very excited to be here having an official conversation with you. You and I talk nearly daily now.

Tim Sarrantonio:

Yeah, yeah. I'm surprised that it's, and that's why Kerrin, thank you for joining as well. <laugh>

Kerrin Mitchell:

<laugh>. You're welcome. I'm really excited, actually. I am excited. Woodrow, your name has been on the list of people we wanted to bring in forever, so I am so thrilled you finally made it work. And you know, obviously, I'm familiar with your work. I'm not on the daily, the daily phone call list, but I am someone that is absolutely a fan, a fan girl, if you will, of what you guys are up to. I would love to have you introduce yourself though, for the larger audience. Tell us what brought you to your career here in philanthropy.



Woodrow Rosenbaum:

Sure. So my role is Chief Data Officer at Giving Tuesday, which began as an effort to just get some benchmarks, some measures, metrics of the growth of Giving Tuesday as a movement and as an intervention, as a yearly activation. And as we began to collect data in order to get that job done, we ran into the same problems that the nonprofit sector has been facing for a long time, lack of data, it's siloed, it's opaque, and we had to solve some of those problems in order to get measures of this distributed and open source movement. And by solving those problems for ourselves, what we ended up with was assets for the whole sector. And so now this effort is, goes beyond just what is going on, on Giving Tuesday, which is still really fascinating and a useful research opportunity. But all but much more broadly, what are the motivators of generosity?

What are the impacts of the ways people bring themselves to solve problems in their communities? And I came into this really by accident. My background is in commercial marketing. And at the beginning, I think my involvement was really as a consultant, kind of trying to help the movement to engage with companies that had data about what was happening on Giving Tuesday. And then gradually as that opportunity grew, so did this opportunity for me to be more involved. And so now this is my day to day, my full-time passion and vocation. And the team and the mandate has grown just enormously in the last couple of years.

Tim Sarrantonio:

Well, and given that growth, one of the questions that I love asking people, and this has been introduced intellectually to me by Giving Tuesday is kind of moments of generosity. But if your job, Woodrow is to basically stare at moments of generosity happening daily, and that's kind of the thesis of Giving Tuesday at this point too. How does something stand out to you though? Like, what it is for you personally, a moment of generosity that sticks with you?

Woodrow Rosenbaum:

I think what's been really clear from our research over the last couple of years, certainly emerging from the pandemic and the lockdowns and the immediate impacts of that in 2020, is the degree to which generosity is multifaceted, multidimensional and prolific. And that wasn't really clear in part because we didn't have the data. And I think something that really stood out for me that illustrates that was a comment made by somebody at my table at a conference recently hosted by the Gates Foundation. She said that she'd grown up in a poor neighborhood in the US but that she didn't know she was poor until she left to go away to school. Because in the environment she grew up in, she said, we always had something to give and somebody was always giving to us. It looked like abundance to her as a kid. And I thought, I mean, that has really stuck with me because it underscores what is at the heart of actual true generosity and how not transactional it is. And illustrates the really enormous gap between what generosity actually is and what motivates it and what the impacts are from the things that we have been measuring historically.

Tim Sarrantonio:

So I think that's a nice transition into the meat of what we want to talk about today, which is just understanding all of these different trends. We've had a lot of different folks on the podcast this season where we've talked about these, but I think that giving Tuesday's Data Commons is a very unique approach to understanding and addressing these larger problems. But let's actually get into how you and I started to get connected more closely together. Because that's a story in of itself around the Fundraising Effectiveness Project. And Woodrow, before I kick it over to you, I have to say that when I



started hearing your name in these initial conversations, because I was kind of on the auxiliary sidelines of Fundraising Effectiveness Project for a bit a few years ago, and everybody would say, Woodrow wants to talk to us. And I'm a history nerd, and I kept thinking it was like the Woodrow Wilson Institute or something like that, <laugh>. I'm like, why does this presidential library want to talk to us about fundraising data? So how about you actually solve my initial confusion too? What got you connected with FEP, the Fundraising Effectiveness Project? Maybe even tell people what it is because you came at it from like, not the AFP side, you said, let's look at this in a different way. So tell us more about that.

Woodrow Rosenbaum:

Yeah, so coming from a commercial marketing background, I was actually accustomed to an environment where we had really good data about our marketplace. And at the time the work with Giving Tuesday had generated new data assets that had never existed before. A lot more depth of data into online giving in particular. And that was great. It allowed us to start answering a lot of questions that weren't able to be answered before, but we lacked good longitudinal baseline data. And so the beginning of that relationship was we were engaging a lot of different partners in an effort to get some better idea of what Giving Tuesday, the day, was doing in, what the impact of that intervention is in the fundraising landscape. And we needed that longitudinal benchmark data and FEP had it because what the Fundraising Effectiveness Project represents is the collection of standardized, stable, clean data that is at the transaction level donations to nonprofits in the US going back more than two decades.

Tim Sarrantonio:

Let's talk about even the logistics of how you were running, Giving Tuesday, when I met you a few years ago. You would basically email providers and go, here's a format, please fill this file out. And I always felt, because I was the one who took that on, on our end where it's like, we got to give the Giving Tuesday data and I would coordinate with different parts of our development team, and I would feel like it's a heist movie where it's like, we got to hit this time and we're going to get this data at this time because Woodrow needs it by this for when they're reporting on Giving Tuesday. Whereas the vision for the Data Commons is not as manual. So talk about how even the mechanics of managing different vendor relationships has evolved since you started doing this.

Woodrow Rosenbaum:

Yes. Well, as you said, I mean, the beginning of this was what can you tell us about a single day really quickly? And then that evolved to how does that day fit into the larger landscape? And then because we had done that and we were partnering with the Fundraising Effectiveness Project as well as those 70, 75 other various data providers, then we started having assets to really look at something a lot more broad. And as the partnership with the Fundraising Effectiveness Project grew and we started to take on the technical development of that body of work, it gave us an opportunity to give those data providers the kind of value that commercial sector players have. An understanding of where you fit within the market and how you can drive your own outcomes, but then ultimately the outcomes for your clients and the sector. That's the norm, right?

Like having a mechanism for that is normal in every industry. And what's happened, I really kind of turned the corner on this the end of last year where we had the product and started living up to the promise. And so now we've got providers who are first demanding a lot more of us. And then secondly, also coming to the table and saying, oh, we really want, we want to share our data into this effort because we need to market intelligence. We need to be able to understand what's going on. So it's, we've kind of pivoted from we're doing this for the good of the nonprofit sector to that plus business



objectives. And that's why I think, part of the reason why, we've seen that effort grows so substantially over the last year or two.

Kerrin Mitchell:

Yeah, it's very interesting. I mean, there's a lot of industry initiatives out there that have tried and I'll say I wouldn't say failed, but you know, have not hit the mark or like you said, or were not able to execute against the original vision the way that they anticipated. And part of that, to your point is, there's just got to be a data quorum. And, I think what I love about the efforts that you guys put forward is you created something that people find value in and they want to contribute to. So it's not a one-way request to say, we really need this data for X, Y, and Z purposes, but rather saying, we all benefit in this manner. I think the framing of what you guys put together in that partnership is really quite beautiful. And I'm wondering, in that sense, when you look at partnerships, you have obviously FEP and close partnership with the Data Commons. These two are great assets. The data's in there, it's now getting up to date regularly. There's collective approaches, to boot all that good things. Tell me a little bit about how this layers into your data commons vision and what those near term goals are that you feel like in the last year have really come to fruition.

Woodrow Rosenbaum:

So I think first of all, there's a few principles under which we operate, which I think have been key to that, to the success of that effort. One is that it's relationships over technology. We build tech, we build data assets. And in some ways you could describe the data commons as a tech company, but we build that technology on the relationships and that means ensuring that stakeholders get value from this. And it's, we look at it as kind of a Venn diagram. We have our areas of inquiry and prior research priorities and our mission outcomes, and so do our stakeholders. And we try to work in the intersection of those, but not expect everybody to get the same value, but rather we have an environment in which everybody could get the value that is needed for them. The second principle is that we are ruthlessly pragmatic.

So we believe in systems, we believe in, in developing standards and cleaning up our technical debt and, and all of those sort of best practices. But we also believe that the right answer written on a napkin is a lot more valuable than the wrong answer through the quote perfect process. And then the third principle is we, we call it garbage in by design. And this kind of relates to the first one, but the idea is that yes, standards are useful, we need a data standard and, and normalizing that and, and, and making our products extensible require that rigor, but we make that our problem. So, you know, Tim mentioned the Giving Tuesday day of reporting. We have a data standard and we share that with our various partners and they ignore it to various degrees, but we don't make that an obstacle to getting what we need.

Kerrin Mitchell:

Not everyone, Tim loves hanging out with you

Woodrow Rosenbaum:

There are definitely some outliers, I'll say that <laugh>

Tim Sarrantonio:

For the most part they probably ignore.

Woodrow Rosenbaum:



Well, and some of it is also just like, you know, we don't want people to have to translate their formats to match ours, so we deal with that. We make that our problem - cause area, time zones, and currency - and then also just random messiness. The point being that we don't make that an obstacle to getting something. We do the hard work on our end to standardize that, and that's been really effective. And then from there we can do things like apply the Microsoft Common Data model to all of our transaction data so it becomes much more interoperable with other researchers, other systems, but again not requiring that at the input stage. So those are the principles. And then the outcomes we're looking for are, we want to see a dramatic increase in individual giving, not just donations to nonprofits, but including donations to nonprofits.

We want a resilient social sector. And that means having the environment that allows that the sector to make evidence-informed decisions. We want research that is connected to the needs of practitioners so that it is relevant and supports more rapid innovation and new best practices. And then finally, and this is really important, because it's a bit of a juxtaposition with our first goal, which is more giving, we want more agency of givers. Because we don't count all the ways people give in their communities either monetary or otherwise. And the result of that is we pay undue attention to a shrinking pool of financial donors to nonprofits. And that means all the other people who are giving every day in their communities have less agency, less voice in how these problems are solved and how the social sector develops. So we want to solve for that.

Tim Sarrantonio:

What I think is fascinating first, how we collect all of this and review all this matters a big deal. That's the biggest thing that working with you folks have has taught me. But then it's also how do you frame the challenges around that? And I think one thing to note is, especially everything we've talked about for Fundraising Effectiveness Project, while there's a dabbling of Canadian data, it's very US focused. Yet Giving Tuesday is quite a network. There's over 70 national movements, 300 communities, tens of millions of people who participate. How has this changed just understanding the global implications of what generosity can be? How have you evolved your thoughts on all of this and how has this extended into how you approach your work?

Woodrow Rosenbaum:

Yeah, that's a great question. I think that there are two ways to look at this and one is based on our kind of initial thinking where, which still exists and we are still in fact better position than ever to advance this around the world is that FEP methodology doesn't exist anywhere else in the world. We don't have this good granular, high fidelity look at the nonprofit ecosystem and market. But we do have systems and we do have relationships. And so there's every reason to think we could replicate this model in other places. And that's certainly still a high priority. What's changed the most is the degree to which we see opportunities for cross-cultural learning. The way that the nonprofit sector is engaging with communities around the world varies a lot. And there's a lot to be learned about how we break out of some of the limiting paradigms in the US and the global north informed by some of those places. So this means other approaches to measuring giving, other mechanisms for understanding how generosity is deployed by people and communities to make change in ways that can help us reverse some of the negative trends in the sector in the US.

Tim Sarrantonio:

Well, even the fact that we're still pegging success to GDP as the benchmark of this is successful has built in biases against developing countries.



Kerrin Mitchell:

When you say that GDP, are you saying giving us a percent of total GDP?

Tim Sarrantonio:

Yeah, giving us a percent of total GDP. I think it has problems using that as the benchmark of success. Especially when we go global.

Kerrin Mitchell:

Oh gosh, yeah. I mean there's a million things, regulations and things that would dictate it for it. I'm actually totally with you. I get sadden when people are like, oh, it's 2.1 in the US aren't we doing it great or whatever it's now 2.x.

Tim Sarrantonio:

It went down this year.

Woodrow Rosenbaum:

Yeah. I think I've been always thought, I agree with you, it's problematic, but it's also just, on the one hand you could argue that it's a benchmark and it tells us something about the economic health of the nonprofit sector. I think pragmatically speaking, my issues with that as the measure is that it doesn't tell us how to fix the problem. And it lends people to think that there's some sort of maximum you could reach at somehow the speed of light. You can't break out of 2.5% percent of GDP. That's just as fast as we can go. And that scarcity mentality leads a lot of people in the sector to limiting behaviors. The practice of philanthropy doesn't change because we think that the pie is fixed, where the data don't actually support that.

Kerrin Mitchell:

So you've chatted a lot in the past about the idea of scarcity mindsets. Can you explore that a bit for us here?

Woodrow Rosenbaum:

Yeah, I mean, what we see is that generosity is abundant, it's diverse, and it's robust. So that means that, if we have a problem, it's actually a lot more limited than we might have otherwise thought. If we're only measuring participation in nonprofit fundraising and total donation dollars to nonprofits, that lends us to a different expectation. What we clearly see is that a lot of the prevalent beliefs about competition, about fixed sum environment, just don't [sic] hold up, that data don't support that that's the reality. So we see that giving is actually pretty generative. The best indicator somebody's going to take some action for good is that they've taken some other action for good. And that means things like giving to a political campaign or to an individual's crowdfunding campaign.

These things are not, they don't extract from other opportunities. And it is very nuanced, right? If you ask people who participate in mutual aid in the US, they're more likely to say that they prefer to give directly to a person in need rather than to a nonprofit or charitable organization. However, they're also more likely to give to a charitable organization, respond to a charitable appeal than their peers. So what we see is in fact that the more generous people are and the more ways in which they find opportunities to leverage their generosity, the more likely they are to be supportive of nonprofits.



Kerrin Mitchell:

You're looking at this from a lens of being able to see this giant network of 300+ communities and 70 national movements, I think Tim said, you get this lens at a meta level that I think some of us don't always get to see. And I know that you may have a report coming out or have come out at the point of this this podcast airing that's unveiling some of these interesting trends that you are seeing. The things you just talked about, are you seeing those kind of pull through into 2022 and onward or what are you seeing right now in the market in terms of people's awareness and giving and habits?

Woodrow Rosenbaum:

Yeah, we look at all of the ways that people give. And so we look at not just giving money, but other things that you can give and we look at, at the mechanisms people use and the channels that through which they give. So not just to nonprofits, but all the ways that people can give anything that they have. And what we see is that first of all, all around the world, the vast majority of people are giving to others. And we see, as our 2022 lookback report is really clear that we see a reduction in the number of people and the total dollars given to nonprofits in the US. Everywhere else we look, in every other way, we see that generosity is pretty resilient and very, very diverse. So people are giving in multiple ways.

It, in fact, only giving in one way, either only to nonprofits or only money, or only time for that matter, is very rare. Most people are giving in a multitude of ways. And yet what we measure and how we engage tends to be very transactional and fixed. And that lends us to approaches that are not optimized for a plurality of givers, a diverse set of donors. Our practices are getting the outcome they're designed for, which is fewer people giving to nonprofits and an over-reliance on large donors. While what we see from our lookback report, people are finding lots and lots of ways to give all of the time. And this is not a disconnected environment, right? Like if your community is taking care of itself, it needs a food bank less. And again, what is really clear is that these behaviors are not cannibalistic. So we are leaving engagement on the table. We're not inviting people to be part of the nonprofit ecosystem, and yet they're still finding ways to give all of the time.

Tim Sarrantonio:

This is the part that grinds my gears, so to speak. I don't know if we're going to turn that into a segment, Kerrin, but the thing that I keep seeing is won't anyone think of the affluent? And it's like, they're fine, like rich people can defend themselves. That's not the issue here. It's the power imbalance. And what I've always strongly believed that the data you talk about has long shown is people are generous, they don't feel heard. It's, they're going to keep trying, they're going to try in ways that make sense for them. And it's on us to kind of focus in on how can we change our behavior to better match that generosity, in my opinion. But I digress.

Woodrow Rosenbaum:

No, I think that's exactly right. And I think that if, even if you just want to be totally pragmatic about this, it's clear that a broad base of support is necessary for nonprofit resilience. And to get that broad base of support, you've got to engage people in a much broader way, more people in more ways. It is a different sort of engagement than the sort of large donor stewardship model. And it's not about doing less of that, the latter necessarily. It's about not being so reliant on large donors who, as of the end of 2022, have pulled back in response to economic uncertainty, presumably. So just practically speaking, this is what we need to do. We need to start engaging people and more people in more ways. That said, you know, I don't, I don't think it's fair to lay this all on the feet of fundraisers.



I think there's things we need to do in order to change our practice, but we also don't have an enabling environment for that change. We have a system where, for one thing, if nonprofit is in desperate need of funds next month, you can believe all you want, that a broad base of support is what you need for long-term resilience, but you're still going to look for someone to write you a big check next month. And that's a factor. And it's not like the nonprofits in this environment have a lot of risk capital to start going and investing. The problem is that we just don't have a choice. We've gotten now to the point where the big concern was what happens if the large donors start to pull back. Well, it happened, it's here and now we have no choice. We must broaden our engagement and not at the end of the year, not during quote giving season. We need to go into giving season, Giving Tuesday and the rest of December with a broader base of support. And that I think is the key message we would like to carry is that what our report shows is that the result we're seeing is not inevitable. It is within our power to change it and it's urgent that we do so today.

Kerrin Mitchell:

What are some of the practical next steps that you would apply to those? So for anyone listening, the idea of we understand that it's changing, what are the things that perhaps whether you're an ED or a board member or you're trying to help build sustainability for the long term of your nonprofit, what are some of the practical suggestions you have in the near term?

Woodrow Rosenbaum:

Well, you know, the organizations that I see that are better able to kind of tap into this opportunity are the ones that don't silo things like storytelling, communications, marketing from their development. They see that as a combined effort. It's about not always thinking about this in terms of the best fundraisers get promoted to major gift officer, right? We need to think about this more broadly. It's about a mind shift from how often can I solicit somebody and ladder them up a little bit at a time to how do I get someone to feel like they're part of my mission in lots of different ways. That's a dialogue and it's multiple opportunities to get involved that aren't always just donate money. So, I mean, that's sort of we get to a new best practice that is more broadly engaging and we have to do that in ways that are scalable, but there's lots of tech to help to make that scalable. And the nice thing about it is it is actually a scaled model. That's the whole point of that sort of broader engagement is you bring people in and you make them advocates and you'll give them lots of ways to get involved. And you see that as providing them with an opportunity to make change as opposed to thinking about it as some sort of burdensome solicitation. Because just that mind shift will help you to engage people in ways that they're going to feel or is more personal and responsive.

Tim Sarrantonio:

So Woodrow, as we round things out for today's fantastic episode, we always like to ask our guests if there's something we haven't talked about today that you want to make sure that we touch on?

Woodrow Rosenbaum:

One thing that I will just mention, our 2022 lookback report, I think is a really good source of kind of a much broader understanding of what the situation is, both in the US and around the world. But we recognize that organizations need us to be a little more prescriptive as well. We've tried to layer in some, some direct advice within that lookback report, but we're also undertaking a much more in-depth analysis of some of the volatility that we saw in the market and fundraising at the end of 2022, because we think this is a real opportunity actually to see what works and what doesn't. We were seeing really



quite varied results both on Giving Tuesday and throughout the year. So we want to unpack that a little bit. So we're working with our partners, including Neon One and a number of others, to do a much more in-depth analysis of what those best practices are. This project is called Insights to Action. We're in the process of setting up some AB testing and the goal there is to really come back to the community in advance of Giving Tuesday this year with some much more specific best practices that we think organizations can deploy. And in the meantime, our message is go out there and build a broader base of support so you have that asset to leverage when we come back at you with, here's some things you can do with that community.

Kerrin Mitchell:

Thank you so much, Woodrow. This was absolutely incredible.