

# PHILANTHROPY INTELLIGENCE

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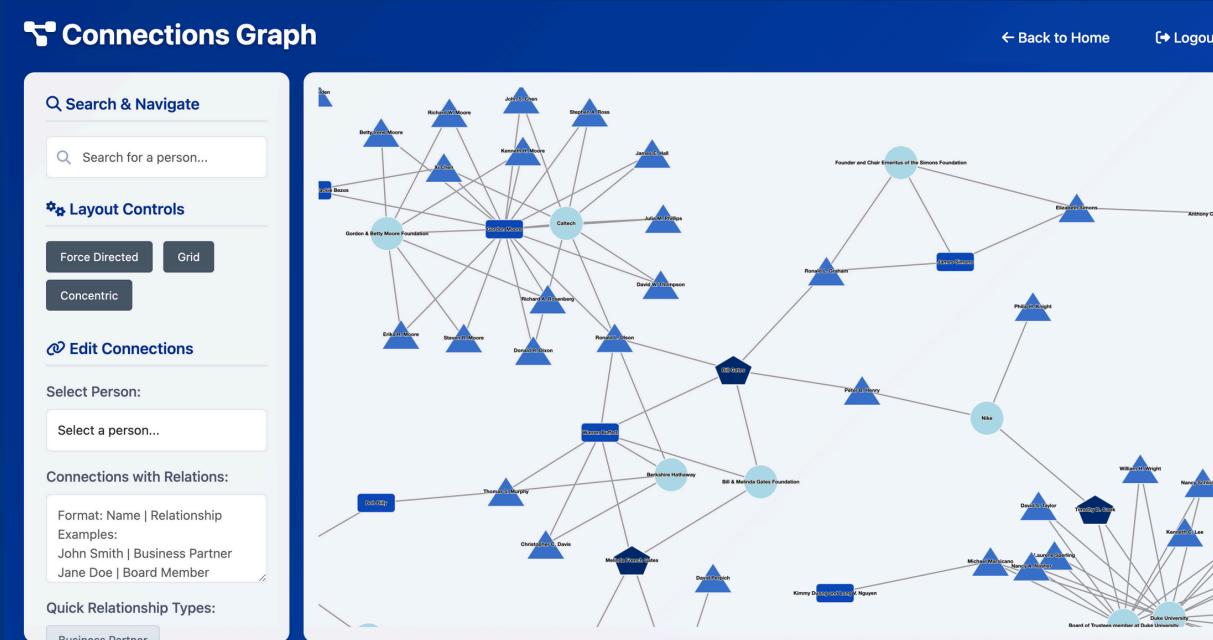
Duke  
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DEMO VIDEO

## OUR MISSION

Our stakeholder, Duke Alumni Engagement and Development, wanted to create a process for identifying **yet-to-be-affiliated (YTBA) philanthropists** who may be interested in donating to Duke. However, their current process is manual and involves decentralized sources. It was time for our team to **develop a product that can efficiently locate these YTBA philanthropists in hopes of bringing about transformational change through Duke.**



Above: Connections page

## PROCESS

- Analyze major gift data sourced from the **Chronicle of Philanthropy** (database of charitable giving) & integrated data into our platform's database
- Identify where **philanthropists' interests align with current Duke initiatives** using Matchmaking feature
- Uncover Duke alumni who may have ties to these philanthropists** using Connections feature, providing a potential pathway for outreach



## FEATURES

- Filter/Sort by name, interests, employment, recipient, etc...
- AI Donor Search
- AI Chatbot
- AI Prompt Template Editing
- Connections Visualization
- Matchmaking between Duke initiatives and Philanthropists
- Change Log
- Duke Authentication

Match Results				
DONOR		MATCHED CATEGORY	TOP 1	TOP 2
Grant Hill		Student Experience	1 Bass Connections 1.00	DukeEngage 0.00
Tim		Climate	null Climate+ Nicholas Institute	
Tim Cook		Science & Technology	1 Duke Innovation & Entrepreneur 1.00	Duke Science & Technology (DST) 0.64
Jack Ma		Student Experience	1 QuadEx 1.00	Bass Connections 0.42
Oprah Winfrey		Student Experience	1 QuadEx 1.00	DukeEngage 0.68

Above: Matchmaking page

The 'Selected Person' modal displays information for 'David Perpich - Managing connections for this person'. It includes a search bar, a 'Quick Relationship Types' dropdown, and a 'Name' input field with a 'Relationship' dropdown. A 'Save Connections' button is at the bottom.

Above: Editing connections modal



## FUTURE STEPS

- Match philanthropists and Duke Scholars through their shared interests using Scholars@Duke API
- Ranking Philanthropists based on location, giving history, board membership, gift amount, etc.

The Duke YTBA Philanthropy AI homepage features sections for 'Ask a Question', 'Add New Donor', 'AI-Powered Add Donor', 'Filter Donors (Real-Time)', and a donor list table.

**Ask a Question:** A text input field with placeholder 'e.g. Which donor gave the largest gift in 2023?' and a 'SUBMIT' button.

**Add New Donor:** Form fields for 'DONOR NAME' (with a dropdown for 'INTERESTS' including Art, Biology, Business, Computer Science, Economics, Education, Engineering, etc.), 'RECIPIENT' (with fields for 'YEAR', 'GIFT AMOUNT', 'GIFT TYPE' (e.g., Cash, Stock, In-Kind), 'EMPLOYMENT' (e.g., CEO at Acme Corp), 'BOARD MEMBERSHIPS', 'LIFETIME EVENTS', 'PHOTO URL', and a 'SAVE DONOR' button).

**AI-Powered Add Donor:** A text input field for 'LIST OF DONOR NAMES (ONE PER LINE)' with examples: 'John Doe', 'Jane Smith', 'John & Jane Foundation'.

**Filter Donors (Real-Time):** A search bar 'SEARCH BY NAME', dropdowns for 'FILTER BY INTEREST' (All Interests), 'MIN GIFT AMOUNT' (e.g., 1000000), 'EMPLOYMENT' (Type employment...), and a 'CLEAR' button. It shows a list of 76 donors.

**Donor List Table:** A table with columns: Name, Added, Updated, Recipient, \$ GIFT AMT, and Year. It lists entries for Grant Hill, Tim, Tim Cook, Jack Ma, and Oprah Winfrey.