

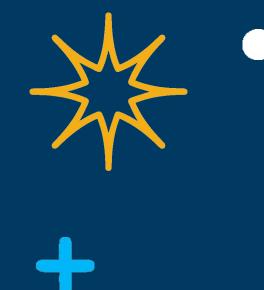
dp donorperfect

# COMMUNITY CONFERENCE



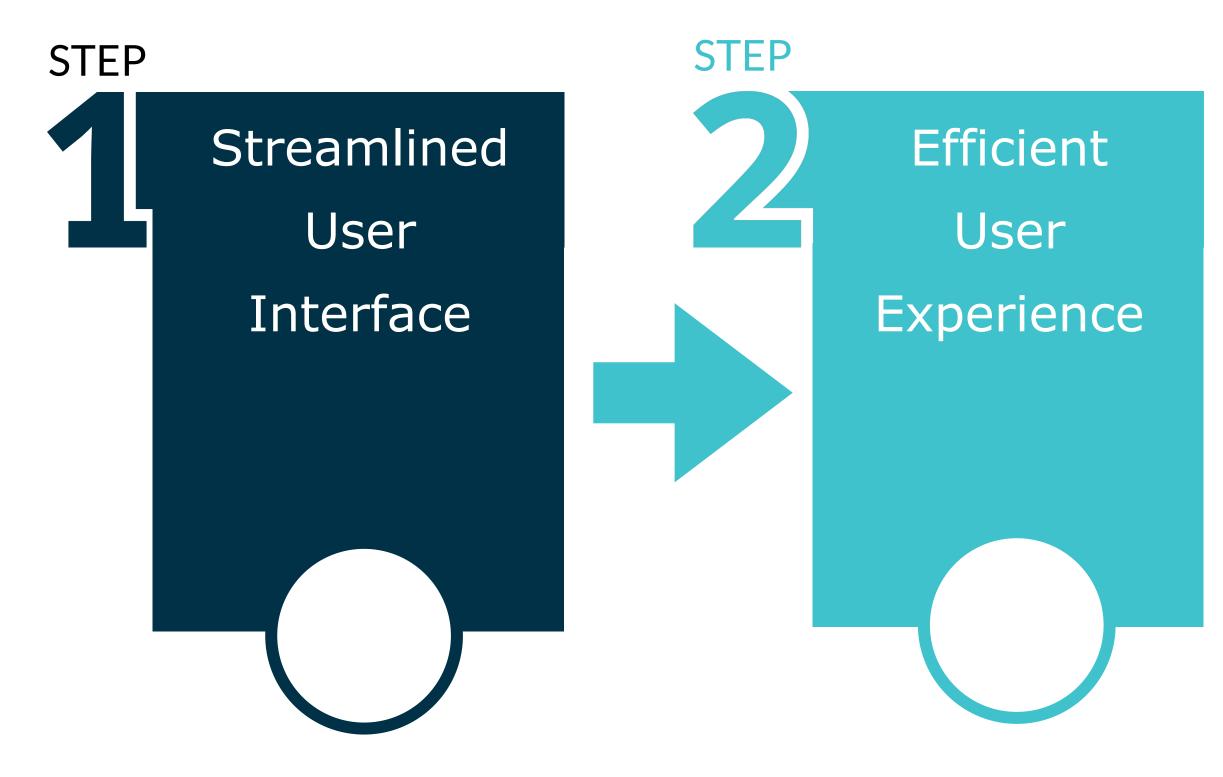






# DonorSearch: Expanding Our Reach and Technologies

### A New Look and Feel







Happier and More Productive Client

### Integrated Search Page

- Designed to be less busy
- Minimize the scrolling needed for most searches from the real estate match
- No scrolling on a normal monitor
- Drawer for Advanced Filter include custom fields, giving history, etc.
- Add more addresses with a plus button
- 4 clicks to Profile after First and Last name
- "Breadcrumbs" for easy navigation back through the application

Home			
$\odot$	Name		
	First Name * LAWRENCE	Middle Name J	
User Added Fields	Spouse First Name LAWRENCE INVESTMENT	Spouse Middle Name	
ő	Address 1		
	Street Address 1 * 2850 BROADWAY ST	Street Address 2	
	State * CA	Zipcode *	
	Contact Info		
	Telephone (XXX) XXX-XXXX	Email	
		Lookup Add	re



	Integrated Search	Search Options ~	My Portfolio	🔒 Marketing List 🔒 DSAI 🔒 🅐 💭 N
				Recently Created Profiles
	Last Name *			Q Search
	ELLISON			
	Spouse Last Name			Lawrence J Ellison
	LLC			2850 Broadway St, San Francisco, CA 94115
				(Created March 21st, 2024, 2:02 PM)
			÷ –	
			00	Susan Philanthropy
	City *			11245 Dovedale Ct, Marriottsville, MD 21104
	SAN FRANCISCO			(Created March 21st, 2024, 1:57 PM)
				Mark Cuban
				5424 Deloache Ave, Dallas, TX 75220
				(Created March 21st, 2024, 1:57 PM)
				Kevin A Plank
				930 Greenspring Valley Rd,
				Lutherville Timonium, MD 21093
				(Created March 4th, 2024, 3:20 PM)
Create Profile			Clear	View More

### Enhanced Address Lookup

- Available from the Integrated Search
- Default will be sorted by AVM.
- Built-in sort by columns
- National search, no state needed
- Auto populate IS input form
- Search by city, state and zipcode

irst Name *	Middle Name	Last Name *
LAWRENCE		ELLISON
NAME 🌻	SPOUSE 🌻	ADDRESS
LARRY ELLISON		6109 HWY 58 COMANCHE, TX 76442
LARRY ELLISON		9731 CAYENN DR, CHARLOTTE, NC 28214
LARRY ELLISON		5431 AGUA FRIA RD, MARIPOSA, 0 95338
LARRY ELLISON		4 SUGARBUS CT, SAVANNA GA 31406
LARRY ELLISON		225 MEMORY DR, FORT WORTH, TX 76108
LARRY ELLISON		89 COUNTY ROAD 2401 S WINNSBORG TX 75494
LARRY		5635 MACK



City	State	Zipcode	
	Select a St	tate 🗸	Search
VALUE 🌲	ADDRESS 1	ADDRESS 2	ADDRESS 3
\$757,910			
\$362,700			
\$339,500			
\$265,500			
\$248,600			
\$235,870			
¢007.700			

50 per page

### User Added Fields

- Add client-specific information such as internal giving, client ID number and engagement information from the beginning of the custom profile process.
- Users can save time by having client-specific information on their donors directly input into the custom profile for easy reference to internal giving and involvement, combining both internal and external data for more insightful analysis.

### User Ad

Personal

Age

Suffix

Client ID

Giving

Largest G

Largest G

Last Gift

Last Gift

Total Gift

Total Gift

User Fiel

User 1

User 2

User 3

User 4

User 5



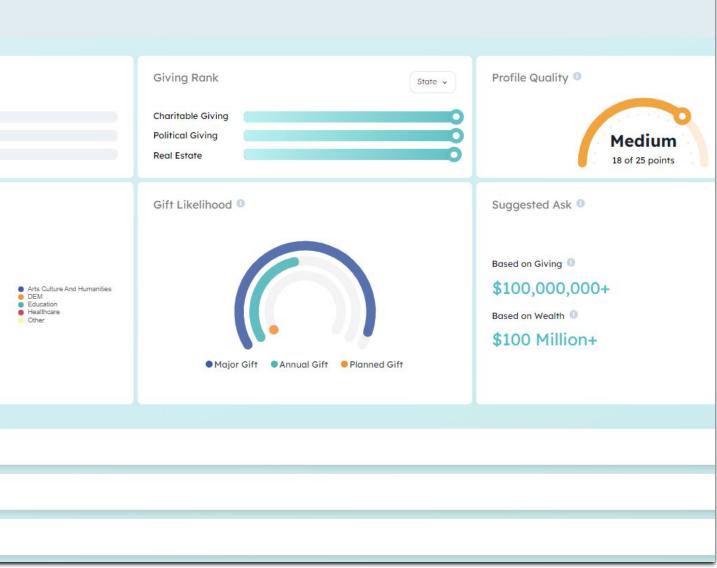
lded Fiel	ds ov	$\odot$
		1
ift		
ift Date	mm/dd/yyyy	
Amount		
Date	mm/dd/yyyy	•
Amount		
Count		
ds		
	Clear All	

### New Profile Design

- Redesigned header, renamed Hero Section with new analysis
- Data Tabs to Organize Sources and reduce the need to move up and down
- Compact Expandable data sections
- Floating Profile Refresh accessible constantly

\$	Home / Lawrence J El	lison	
Ð			
	Client ID: Business Address: Seasonal Address: Spouse: Age: Date of Birth: Phone Number: Email Address:	Lawrence J Ellison 2850 Broadway St San Francisco, CA 94115 8205 N/A N/A Lawrence Investment Llc Click to add Click to add Click to add	Engagement RFM A MLR A DS AI A Giving Snapshot •
	Charitable Gi     Political Givin		
	Crowdfunding	] by Donor Social 🥝 0 🚺 5	





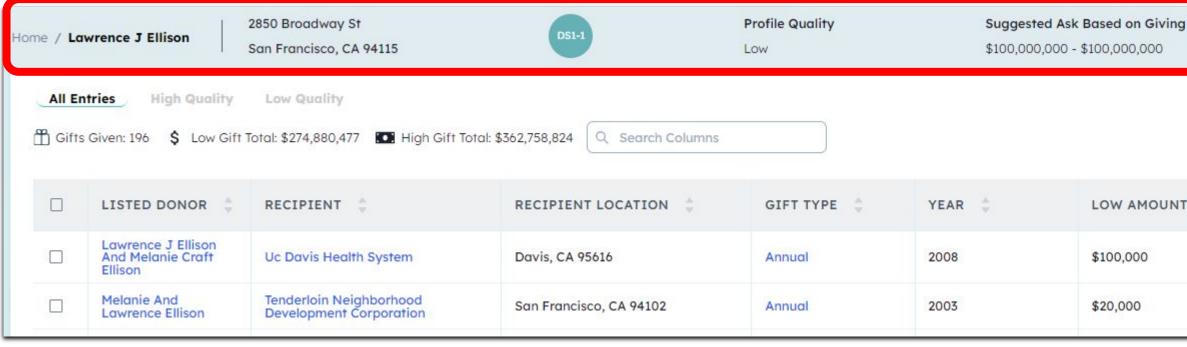
### **Profile Hero Section**



- Interactive dashboard tiles
- High-level overview of prospect



### Collapsed Profile Hero Section



 Hero section collapses as you scroll down • Freezes most pertinent information at the top for reference • Users do not need to jump to the top of the profile to see the highlights, address, etc.



)	Suggested \$100 Millio	argest Giving Category		
				Add A Gift
				⊞ ¢
¢.	HIGH AMOUNT	CATEGORY 👙	SCORE 👙	Î
	\$100,001	Health Care		×
	\$49,999	Community Improvement		×

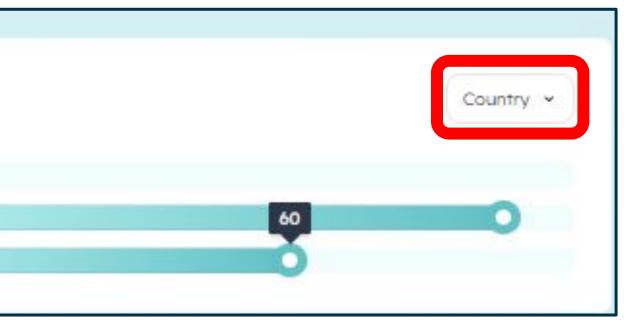
### Relative Rankings

- Matched values for real estate compared to state and nationally
- Matched values for charitable giving compared to the state and nationally
- Matched values for political giving compared to the state and national
- The goal is to anticipate the relative impression/feelings of prosperity.
   An average home in an expensive region with higher regional prices is not likely lead to a feeling of wealth.

Giving Rank		
Charitable Giving	0	
Political Giving	ć.	
Real Estate	6	

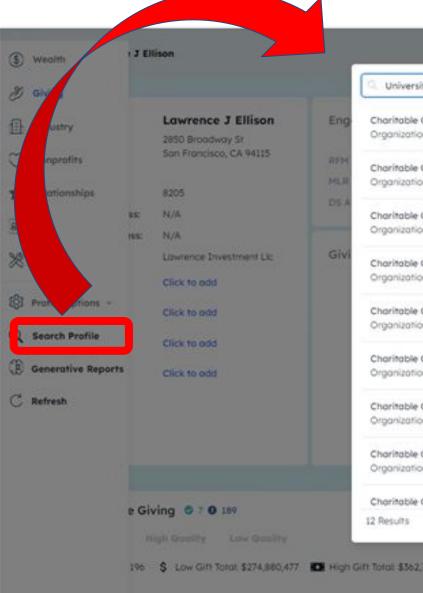
Giving Rank	State ~
Charitable Giving	
Political Giving 30	
Real Estate	





### Profile Keyword Search

- Data sections do not have to be open
- Keyword summary indicates the location of the matches including context, words before and words after
- Single click of the source you want jumps to that part of the profile.
- Final product will search all DS data sources and all matches.
- Leverages the new technology platform which should make it difficult to replicate.

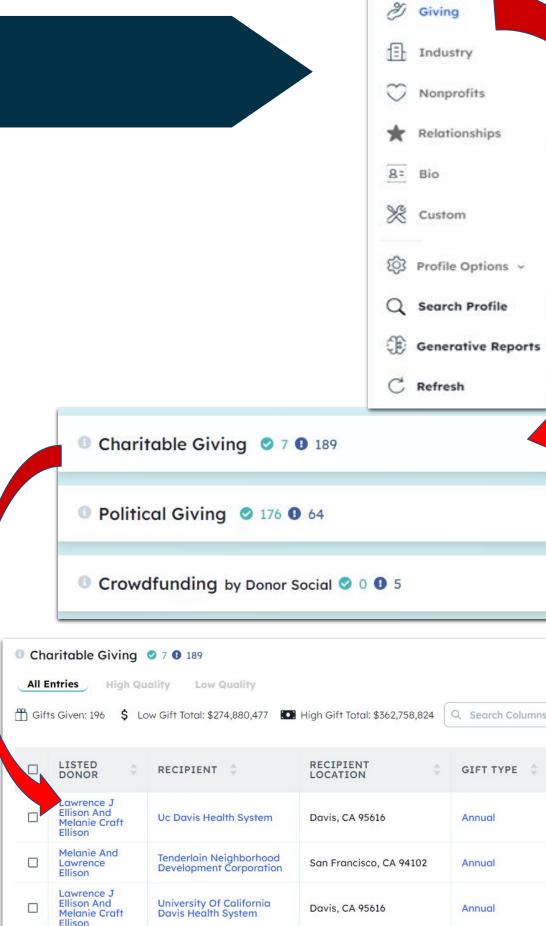




Vrie		
*** JI		
e Giving	1	ofile
ion Name: University Of California Davis Health System		
e Giving		
tion Name: University Of California Davis Health System		
e Giving		
tion Name: University Of California Los Angeles		
e Giving		gge
tion Name: University Of California, Los Angeles School Of Theater Film And Television		
e Giving		
tion Name: University Of California Los Angeles School Of Theater Film And Television		sed o
e Giving		100
tion Name: University Of California Davis School Of Law		sed o
e Giving		100
tion Name: University Of California, Davis		
e Giving		
ion Name: University Of California Sonta		
e Giving		
2,758,824 Q/ Seconds Columns		

### Data Organization

- Data section organized by tabs
- Individual data fields organized into expandable tiles
- Easy navigation
- Smoother transitions
- Client decides on the logical grouping
- Custom tabs are easy to add
- Limits the scrolling up and down continuously



\$	Wealth	1
Ð	Giving	
ß	Industry	
$\heartsuit$	Nonprofits	
*	Relationships	
8=	Віо	
%	Custom	
ŝ	Profile Options ~	
Q	Search Profile	
Ð	Generative Reports	
С	Refresh	
5		

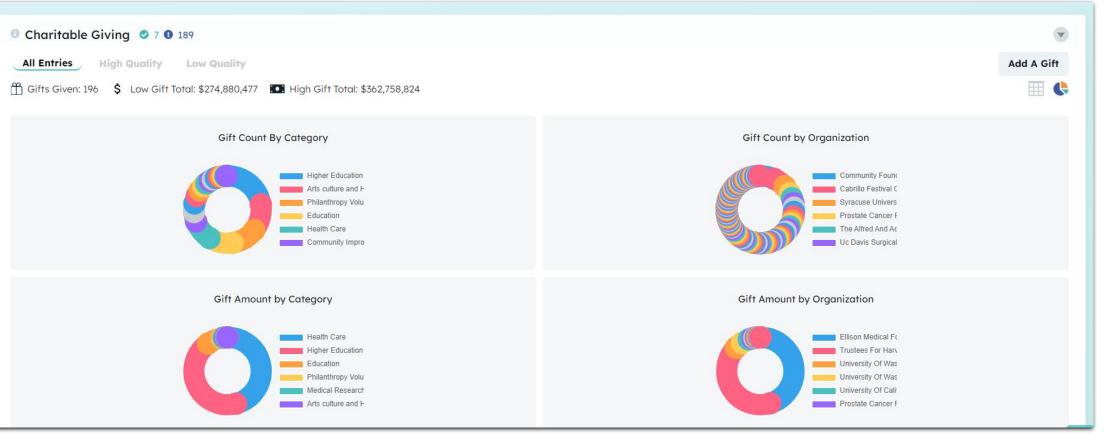
### -Add A Gift LOW AMOUNT HIGH AMOUNT GIFT TYPE YEAR CATEGORY SCORE \$100,000 \$100,001 X 2008 **Health** Care Annual Community \$49,999 2003 \$20,000 X Annual Improvemen X Annual 2009 \$25,000 \$25,001 Health Care

### DONORSEARCH

### Table and Graphs

- Much of the sames functions with some additions
- Sectional controls for opening, viewing quality icon, deletion, etc. very similar
- Presentation of data graphics is one click
- Select fields are two clicks from
   Google Search or jump to search
   options

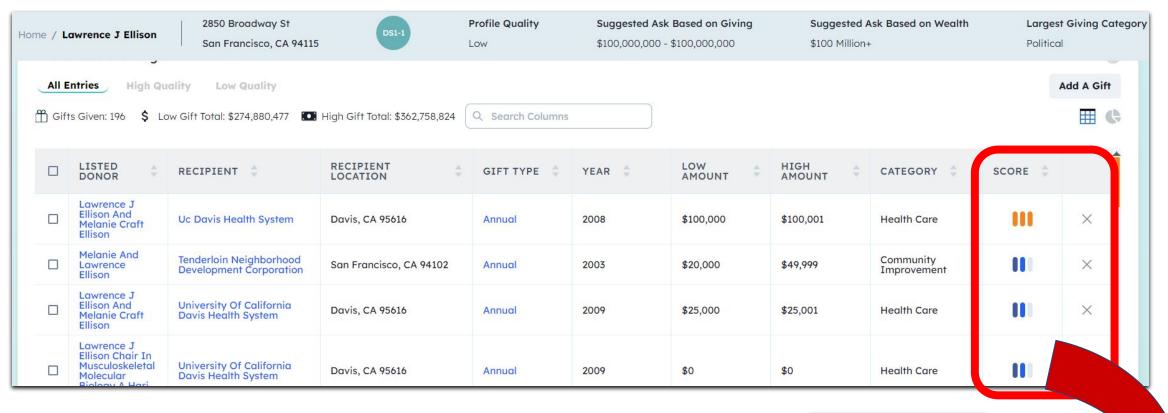
All E	aritable Giving Intries High Qu rs Given: 196 \$ Lo	ality Low Quality	High Gift Total: \$362,758,824	Q Search Columns						Add A Gift
				T	)				<u> </u>	
	LISTED DONOR	RECIPIENT 🌻	RECIPIENT LOCATION	GIFT TYPE 🌲	YEAR 🌻	LOW AMOUNT	HIGH AMOUNT	CATEGORY 🌻	SCORE 🌻	
	Lawrence J Ellison And Melanie Craft Ellison	Uc Davis Health System	Davis, CA 95616	Annual	2008	\$100,000	\$100,001	Health Care		×
	Melanie And Lawrence Ellison	Tenderloin Neighborhood Development Corporation	San Francisco, CA 94102	Annual	2003	\$20,000	\$49,999	Community Improvement		×
	Lawrence J Ellison And Melanie Craft Ellison	University Of California Davis Health System	Davis, CA 95616	Annual	2009	\$25,000	\$25,001	Health Care		×
	Lawrence J Ellison Chair In Musculoskeletal Molecular Biology A Hari Reddi, Phd	University Of California Davis Health System	Davis, CA 95616	Annual	2009	\$0	\$0	Health Care	10	×





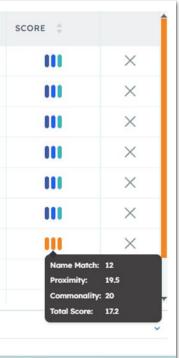
### Quality Scores and Matches

- Easily edit of quality scores and matches
- Gift Table default organizes base on quality of match
- Four keystrokes to verify low quality matches
- Takes two keystrokes to delete a match
- Undo capability for deletions



- Still editable and deletable
- Hovering still provides score information
- Refreshing the page reloads the profile recalculates scores





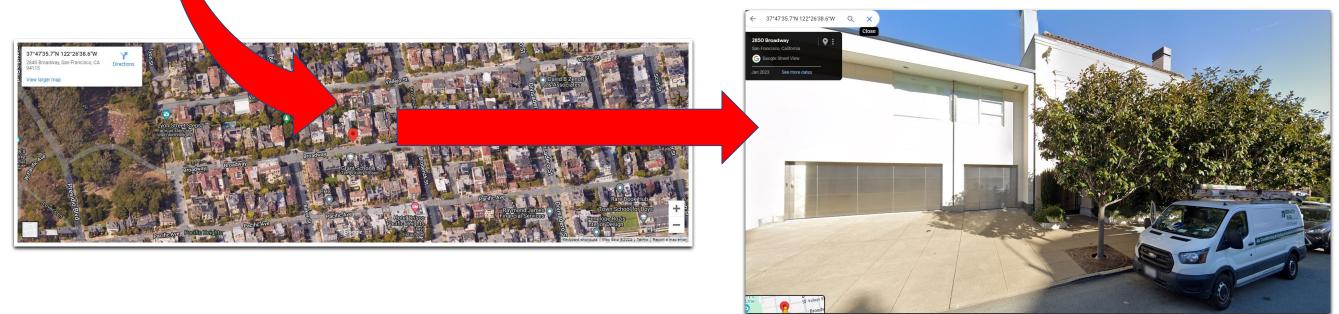
### Real Estate

- Each property expands and collapses as needed
- Same real estate information, but a smoother look
- Google Maps functionality still present



All Entries High Quality Low Quality

Bathrooms: 6	Pu
Bedrooms: 5	Pu
Building Sq. Ft: 10742	AV
APN PIN: 0958 005	AV
Unit Number:	AV
Unit Type: SINGLE FAMILY RESIDENCE	AV
Market Value: \$0	AV
Fips Code: 06075	AV
Land Use Code: 163	AV
Summary	Ext
Summary Land Use Code: 163	



### DONORSEARCH

Full Address 2850 Broadway St San Francisco, CA 94115-1061 Mailing Address 101 Ygnacio Valley Rd #320 Walnut Creek, CA 94596-7026

Owner Ellison Lawrence J Lawrence Investment Llc

Estimated Value \$8,389,101

### Search Zillow



ctended Lien Data

VM Model Name:

VM Valuation Date: 0--

VM Value: \$8,389,101

VM Forecasted Standard Deviation: 0

VM Confidence Score: 0

VM Evaluation High: \$0

VM Evaluation Low: \$0

urchase Recording Date: 1990-06-14

urchase Amount: \$0

### Assessment

**Custom Value** 

Click to add

Assessment Value: \$8,389,101 Assessment Date: 2022-11-04 Sale From Assessment Price: \$0 Sale From Assessment Code: N/A Latest Recording Price: \$0 Latest Recording Date: 1990-06-14 Latest Recording Code: N/A

### Profile Layout Editability

- Add, change or remove data sets and tiles from a custom profile through the Layout Editor. Save the edited profile for future use.
- Customized profiles provide the user with the most relevant information and readability to

B Hero Section   Profile To	abs: Categories Data Sections		Hero Section Profile Tabs:	Categories Data Sections		
Customize Profile Cate	egories	Save Reset Cancel	Customize Data Sections			Save Reset Cancel
Wealth	Real-Estate, SEC-Insider, DSMBT-Wealth		Wealth	Giving	Industry	Nonprofits
Giving	Charitable-Giving, Political-Giving, Crowdfunding		Real-Estate	Charitable-Giving	Crunchbase	Grant-Giving
Industry	Crunchbase, DBUSA-Business, Open-Corporate		SEC-Insider	Political-Giving	DBUSA-Business	Grant-Seeking
Nonprofits	Grant-Giving, Grant-Seeking, Candid		SEC-Insider	Polifical-Giving	DB05A-Business	Gram-seeking
Relationships	Relationships, Inner-Circle, Demographics		DSMBT-Wealth	Crowdfunding	Open-Corporate	Candid
Bio	Full-Contact					
+ Add Custom Category						
(\$) Real Estate		Э	Relationships			Bio
2		~	Relationships			Full-Contact
SEC-Insider - Acc	cess Restricted		Inner-Circle			



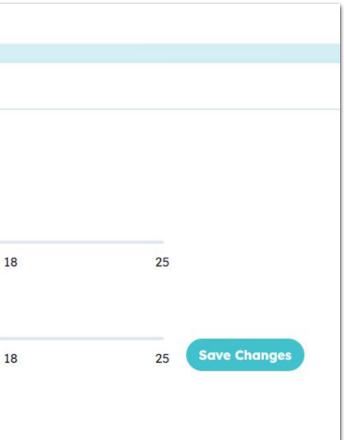
### profile through the Layout Editor. ure use. yant information and readability to d efficiently.

### Scoring Editability

### Customize the Minimum Confidence and High Quality scale of the data. Users can define scoring criteria to make it specific and relevant to their fundraising metrics and goals.

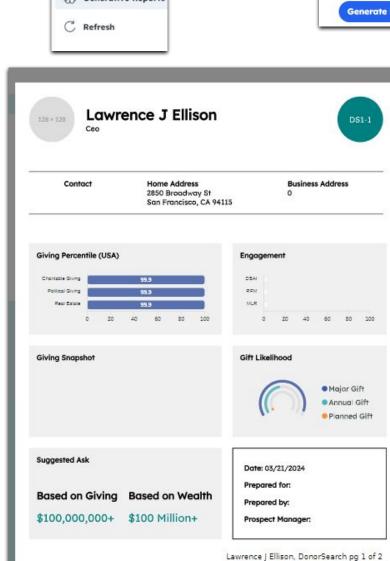
Home / Account Settings					
Account Settings	User Fields	Layout Editor	Scoring		
绞 General					
🖻 Totals Table	Scoring				
ය Profiles	Minimum Co	onfidence			
~ API	12	0	6	12	
20 User Management	High Quality	,			
🖨 Portfolio Management	17		4	10	
🌼 OAuth Clients		0	6	12	



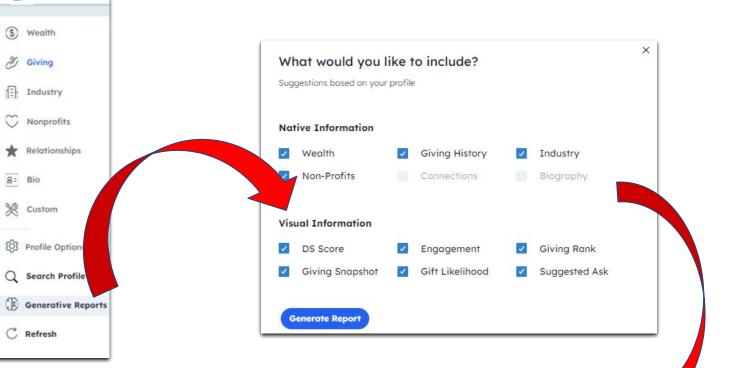


### Generative Reports

- Build custom narrative reports using DonorSearch data and ChatGPT to summarize all or specific sections of a custom profile for easy readability.
- Users can save time by employing Generative Reports to distill DonorSearch data into targeted narrative documents on prospects, giving users much-needed time back for more valuable work.



### DONORSEARCH



Lawrence J Ellison

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.

Eilison'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 Eilison 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 \$3,902,500, and paid out \$33,698,431 to further its mission.

Furthermore, Ellison'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 Ellison's dedication to making a meaningful difference in areas that align with his values.

In addition to his philanthropic engagements, Ellison'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.

Ellison's philanthropic and wealth profile depicts a multifaceted individual whose impact is feit 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

Edit

Close

### Search Options Features

- The Edit for Search button for each result will populate the prospect's information automatically into the **Integrated Search fields to quickly** create a custom profile on the individual.
- With one click, users can switch from Search Options to Integrated **Search without needless keystrokes** or lookups. This workflow streamlines the process of creating custom profiles from initial search results.

	Foundatio
	Foundatio
	Contact I
	Company
ŧ	Social Dis
	Prospect
l	

PERSON FOUND	COMPANY NAME
Kevin Plank	Under Armour Inc

Name		
First Name *		м
Kevin		
Spouse First Name		S
Address 1		
Street Address 1*		S
1020 Hull St Ste 300		
State *		z
MD	~	
Contact Info		
Telephone		E

Search Options ~	Му
Business Data	
Real Estate by Owner	
SEC Data	
Foundation Data	
Foundations by Recipien	t
Contact Info	
Company Gift Matching	
Social Discovery	
Prospect Generator	

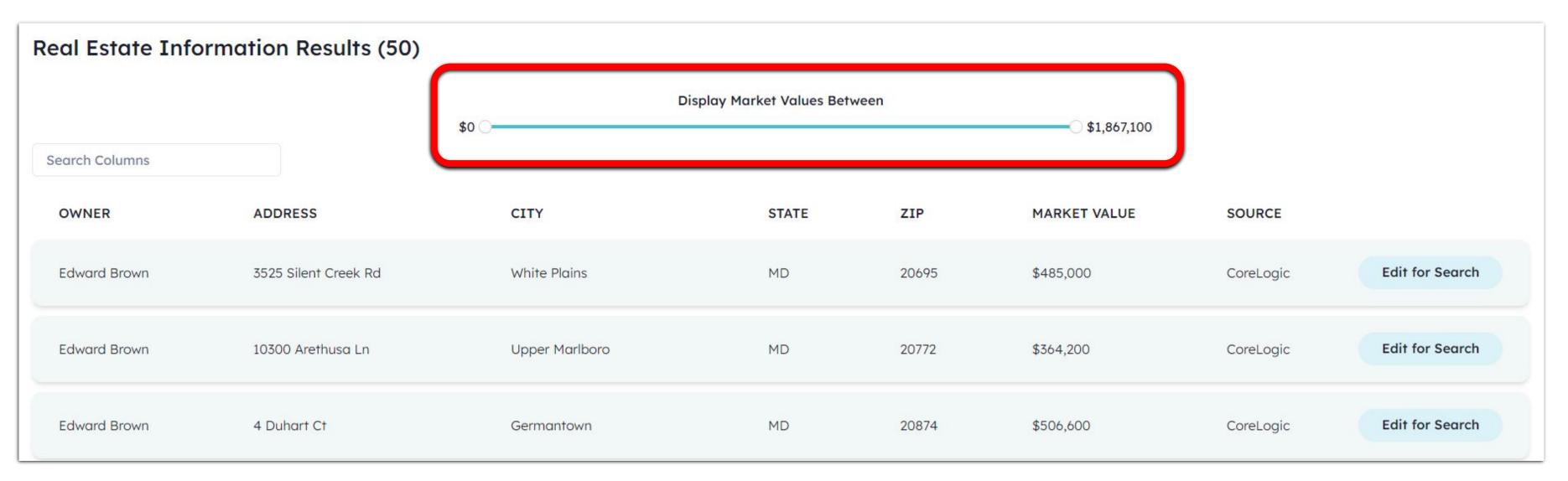
### NORSEARCH

	STATE	POSITION		REVENUE	
	MD	Chief Executive Off	icer	\$5,267,100,000	Edit for Search
Middle Name			Last Nar	ne *	
			Plank		
Spouse Middle N	lame		Spouse I	Last Name	
					$\oplus$ $\bigcirc$
Street Address 2	9		City *		
			Baltim	ore	
Zipcode *					
21230					
Email					
Looku	o Address	Create Profile			Clear

### Search Options Features

• Use the sliding value meter to filter the results by market value.

### • Users can review results in a more targeted and focused segmentation to get a better view of the landscape.



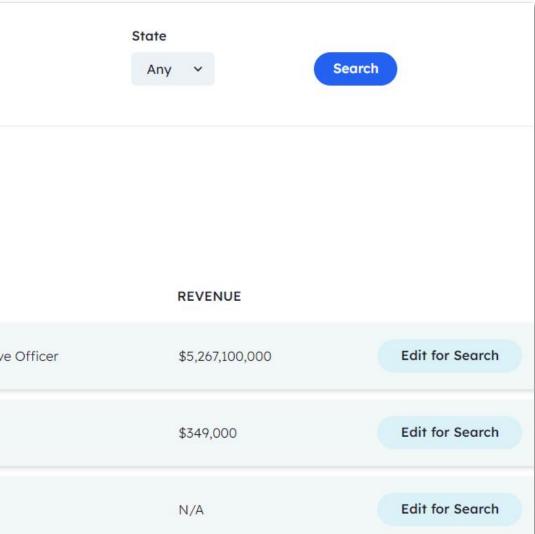


### Search Options Features

- Search within sections and fields for specific terminology to filter the data by that search term.
- Users can segment and isolate specific information to efficiently target and review for relevancy.

Search Type	First Name	Middle Name	Last Name			
• Person • Organization	Kevin	Enter middle name			✓ Use Nicknames	
Database USA (4)						
Search Columns						
PERSON FOUND	COMPANY	NAME		STATE	POSITION	
Kevin Plank	Under Arm	nour Inc		MD	Chief Executive	
Kevin Plank	Sagamore	Farm LLC		MD	Owner	
Kevin Plank	Kevin D Plo	ank		ОН	Owner	





# DONORSEARCH

### A View from Canada





### **Insights into Canadian Donors**

Access to DonorSearch's Canadian data gives you the ability to analyze your donors' and prospects' capacities and affinities with efficiency!

## GeoInsights based on demographic data

## Segmentable lists and mapping capabilities

The largest sourced database of charitable giving records



View Canadian and US giving records together

### Growth At Your Fingertips



### Donors

Learn about your donors' environment and find new prospects

Analysis identify affinities

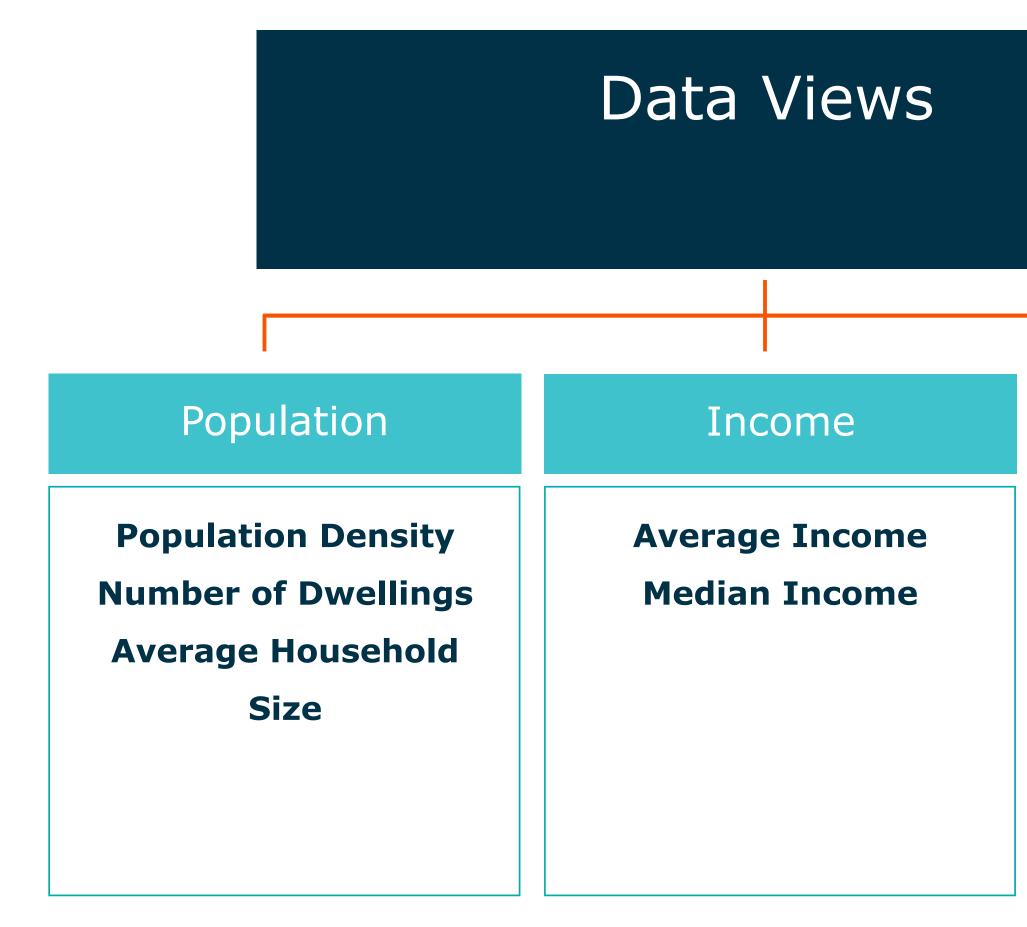
Efficiently segment and capacities and





### Engage

Strategize and engage based on your new insights

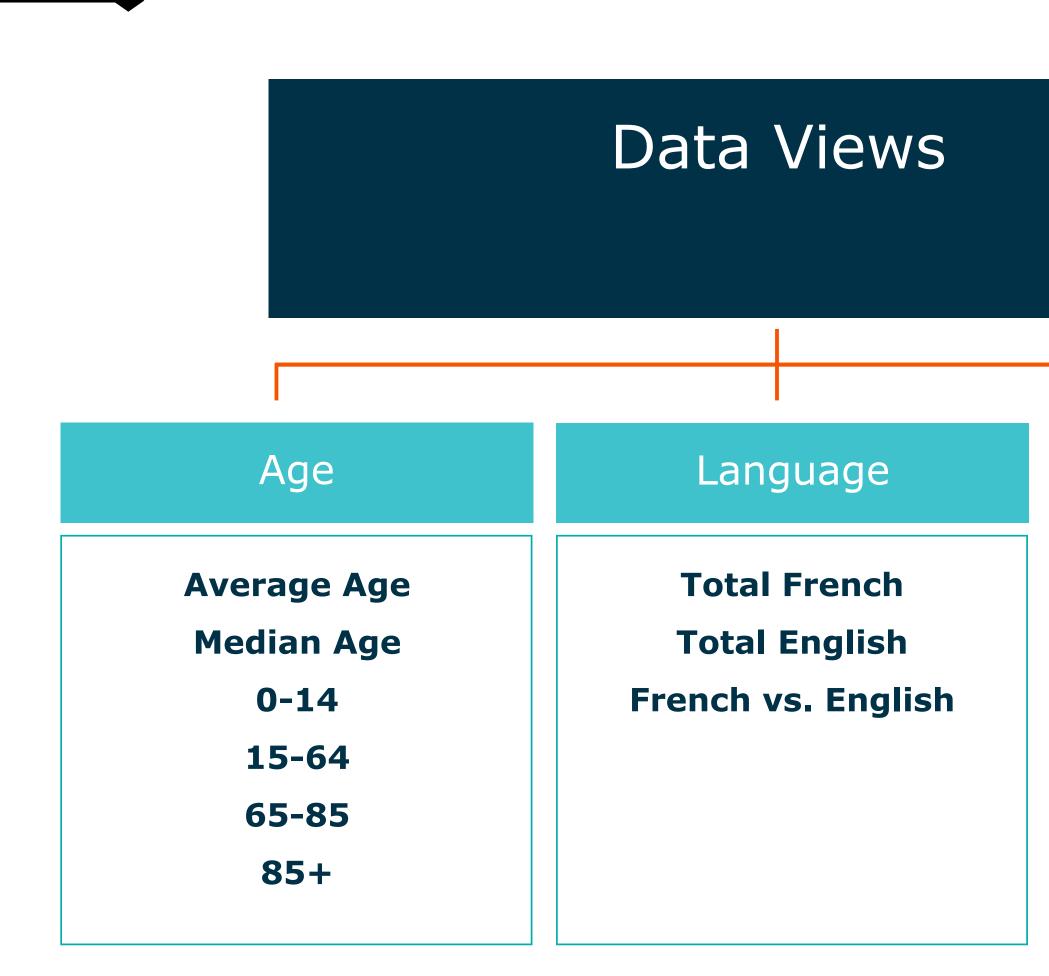




### Home Value

### **Average Home Value**

### **Median Home Value**





### Home Owners

**Total Homeowners** 

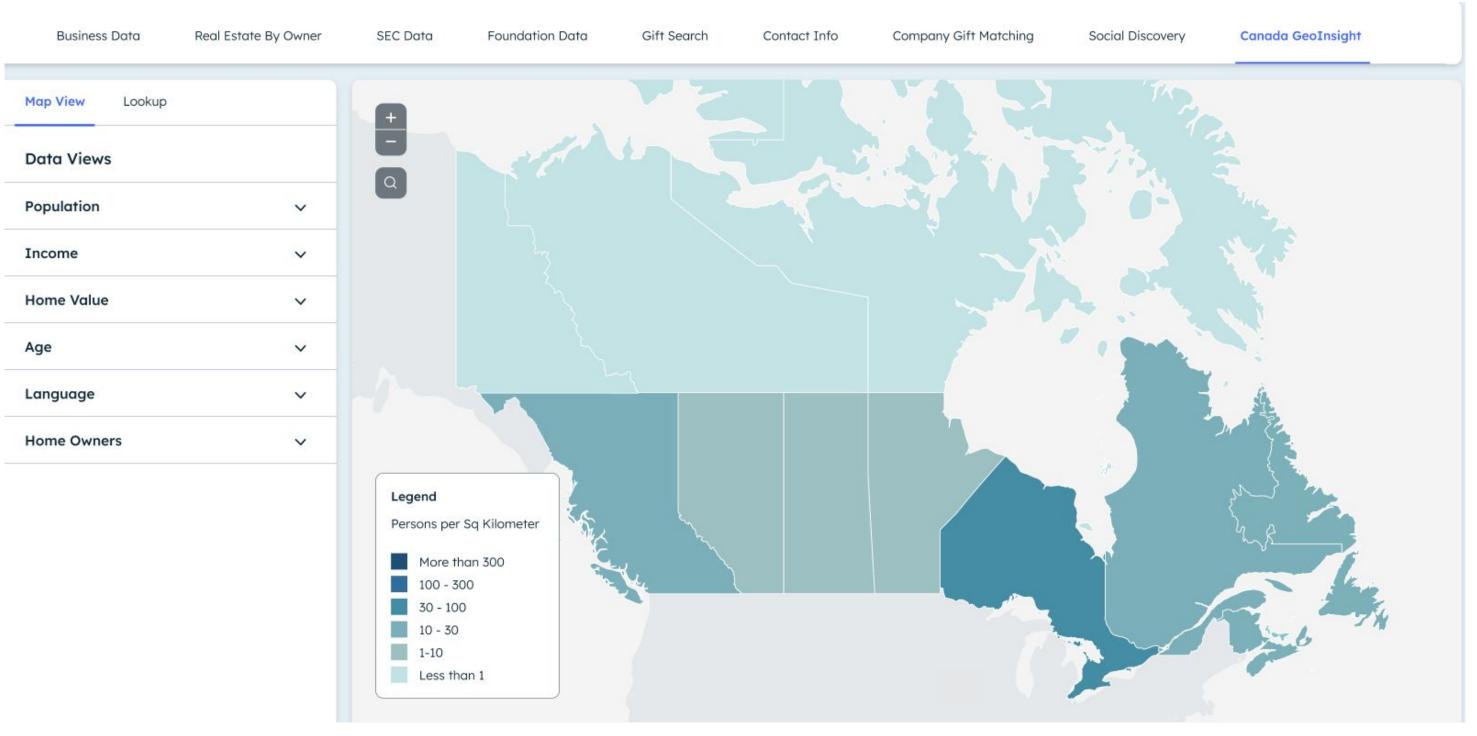
**Total Renters** 

**Renters vs.** 

Homeowners

### GeoInsights

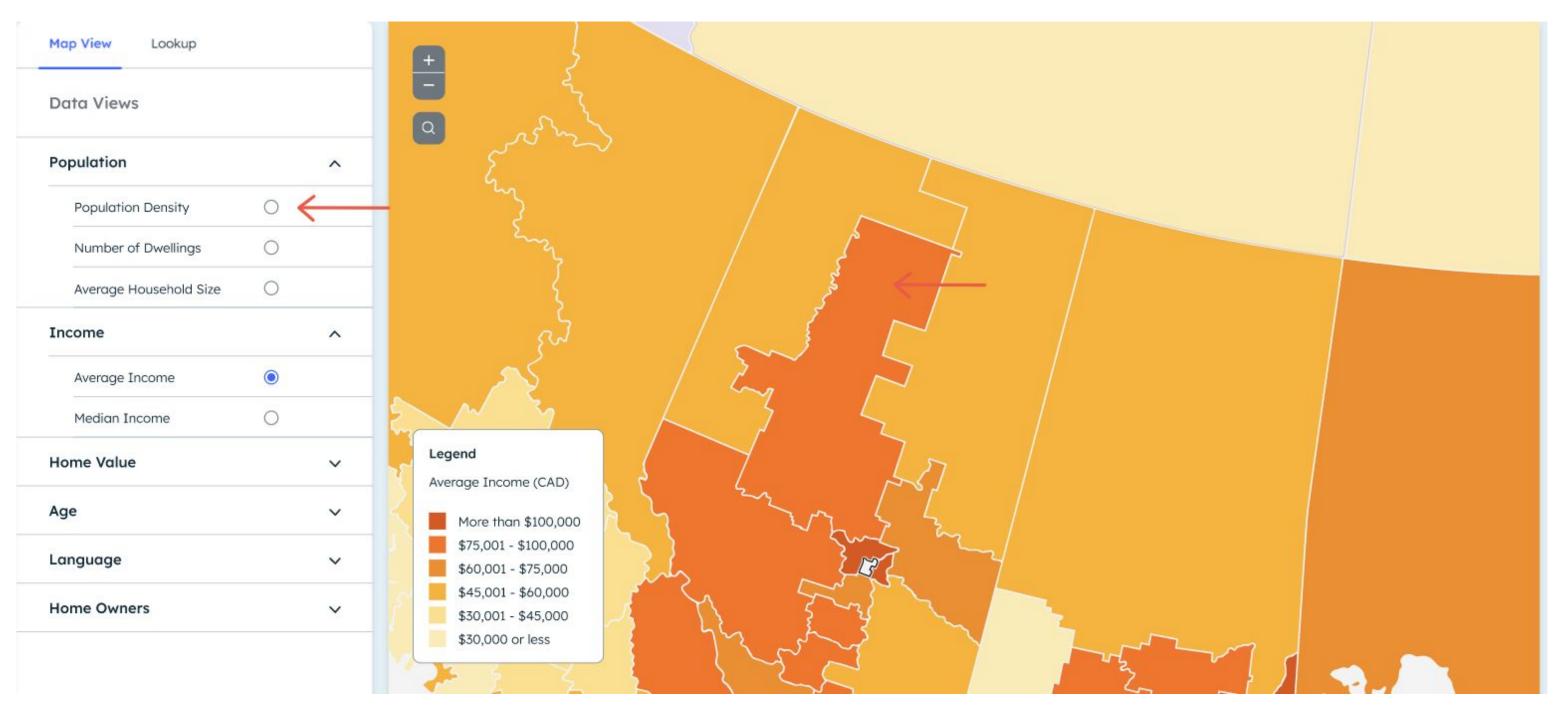
### Filter Canadian Geography





### GeoInsights

# See and compare where your prospects and donors live relative to *high-income earning* areas





### GeoInsights

# See and compare where your prospects and donors live relative to *homeownership levels*

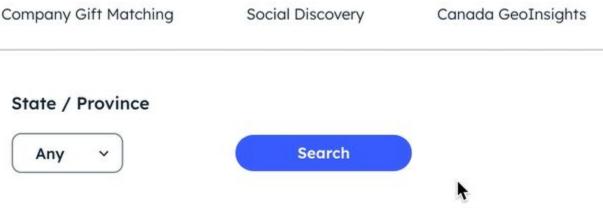




# Canadian charitable giving records have been incorporated into our Gift Search

Business Data	Real Estate By Owner	SEC Data	Foundation Data	Gift Search	Contact Info	(
Country	Να	me				
United States	Canada	) Red Cross			nclude Nicknames	





# Databased Canadian charitable giving records with access to source materials for additional information

Q Search Columns

0 Selected

SOURCE 🌻	DONOR 🌻	GIFT TYPE 👙	GIFT YEAR	LOW GIFT	HIGH GIFT 👙	RECIPIENT 🗘	REC COUNTRY	REC CITY 👙	REC STATE
Annual Reports	Canadian Red Cross 🗸	In Kind	2010	\$1,000	\$4,999	Kickstart International Inc 🗸	Canada	Calgary	АВ
Annual Reports	Canadian Red Cross 🗸	In Kind	2010	\$1,000	\$4,999	Kickstart International Inc 🗸	Canada	Calgary	AB
Annual Reports	American Red Cross 🗸	In Kind	2010	\$1,000	\$4,999	Fritz Institute 🗸	United States	Graton	CA
Annual Reports	American Red Cross 🗸	In Kind	2010	\$1,000	\$4,999	Fritz Institute 🗸	United States	Graton	CA



# Charitable giving tables searchable by keywords and donor information searchable with one click

Q Sear	ch Columns	0 Selected						
	SOURCE 🌲	DONOR \$	GIFT TYPE 👙	GIFT YEAR 🍦	LOW GIFT	HIGH GIFT 👙	RECIPIENT 👙	
	Annual Reports	Canadian Red Cross ~	In Kind	2010	\$1,000	\$4,999	Kickstart International ~	
	Annual Reports	New Gift Search Business Data	In Kind	2010	\$1,000	\$4,999	Kickstart International ~	
	Annual Reports	SEC Data	In Kind	2010	\$1,000	\$4,999	Fritz Institute 🗸	
	Annual Reports	Foundation Data Google Search	In Kind	2010	\$1,000	\$4,999	Fritz Institute V	



### Export selected records

Q Sear	ch Columns	1 Selected Export	$\mathbf{C}$				
	SOURCE 💠	DONOR \$	GIFT TYPE 💲	GIFT YEAR 🌲	LOW GIFT 💲	HIGH GIFT 👙	RECIPIENT \$
×.	Annual Reports	Canadian Red Cross 🗸	In Kind	2010	\$1,000	\$4,999	Kickstart International 🗸
	Annual Reports	American Red Cross 🗸	In Kind	2010	\$1,000	\$4,999	Kickstart International 🗸
	Annual Reports	American Red Cross 🗸	In Kind	2010	\$1,000	\$4,999	Fritz Institute 🗸
	Annual Reports	American Red Cross 🗸	In Kind	2010	\$1,000	\$4,999	Fritz Institute 🗸



### Data Views

### View as a segmentable and exportable table

Map View	Lookup	
Filters		
Populat	ion	+
500,0	00-1.5m ×	
Average	Income	_
Top 10	0% ×	
Income	Percentile	
🗌 Тор	10%	
🗌 Тор	20%	
🗌 Тор	30%	
🗌 Тор	40%	
🗌 Тор	50%	

10 Selected Export								
~	POSTAL CODE	CITY \$	TERRITORY \$	POPULATION \$	AVG INCOME	AVG HOME VALUE		
~	H6I 7G4	Edmonton	AB	783,915	\$59,179	\$1,424,611		
	M4W 8G0	Toronto	ON	783,915	\$59,179	\$1,424,611		
~	M4W 8G0	Toronto	ON	783,915	\$59,179	\$1,424,611		
~	M4W 8G0	Toronto	ON	783,915	\$59,179	\$1,424,611		
~	M4W 8G0	Toronto	ON	783,915	\$59,179	\$1,424,611		
~	M4W 8G0	Toronto	ON	783,915	\$59,179	\$1,424,611		
~	M4W 8G0	Toronto	ON	783,915	\$59,179	\$1,424,611		
~	M4W 8G0	Toronto	ON	783,915	\$59,179	\$1,424,611		
~	M4W 8G0	Toronto	ON	783,915	\$59,179	\$1,424,611		
~	M4W 8G0	Toronto	ON	783,915	\$59,179	\$1,424,611		





### Next Steps...

Name: Phone Number: Email Address:

Ready to take your fundraising to the next level? Let us show you how!

**Book a demo** with one of our fundraising experts today to see how your organization can harness the power data.

