

Philanthropic Web-Based Platform for Givers

Philanthropy has been stagnant at 2% of GDP for 40 years.

Problem: How do we all improve our philanthropic habits?

- How do I decide where to give, build sustainable habits, and track my progress?
- How do I make giving fun and habit-forming for my kids?
- How do I give my friend a meaningful, personalized gift?

Phili: A web-based, mobile-ready platform to build and manage charitable giving habits. Phili eases users into good habits with a Free-to-Play (F2P) experience, makes tailored suggestions, and nudges users towards good decisions. More sophisticated users form likeminded giving communities , and unlock sophisticated donation management tools.

Value Prop: Phili users feel better about themselves and their unique philanthropic identity. They can also invest in their family and friends through charity allowances and gift cards, re-using planned donations to provide a sticky F2P experience for new users. Each user's experience is tailored, while micro-donations are efficiently aggregated through intermediary foundations to uncover new revenue sources for charities.

Phili Technology

Phili has three unique technical approaches for a seamless donor experience

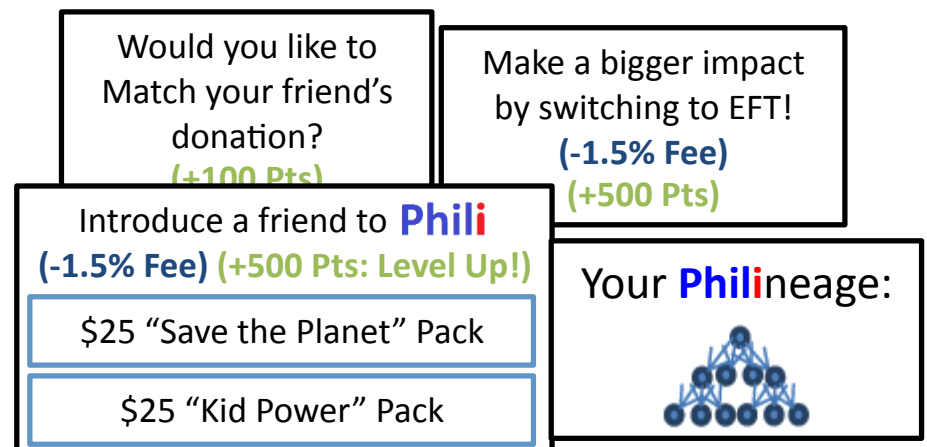
User Interface: Phili's game-like base UI pushes suggestions to users. Parents & gift-givers select a fixed pool of potential charity choices for the initial free-to-play experience. Later interfaces exist for 'Mint-like' donation management and reporting, as well as user communities. Phili structures choices to feed analytics.



3 approaches to a cause: direct, indirect, and political

Analytics: Phili is designed for active A/B experiments, not just post facto analytics. User choices resolve into a “giving identity” of both causes and approaches. Clustering improves suggestions and helps like-minded givers find each other.

Philanthropic Journey: It takes dozens of good decisions to plan monthly giving and give through a paycheck deduction. Phili tracks user commitment, and suggests small, specific actions with intrinsic and extrinsic rewards when the user is ready.



Target Multiway Market

*Online giving represents 6.4% of charitable giving, growing 10% annually...
but these platforms largely try to meet the needs of charities, not donors.*

Donors: Within the **\$267B** personal giving space, we are initially targeting three segments for MVPs, with a planned down-select after 4-6 months:

- High school, college, graduate students and young professionals aged 15-29, who are constantly checking their phones, Twitter, and Facebook looking for meaning. Specifically, they are looking to give friends virtual gifts and/or spread their ideals.
- Middle-class parents aged 25-50, who want their tech-savvy kids to grow into better people, but find them to be disinterested in traditional approaches.
- High net worth individuals, aged 40+, who are already giving significantly to charity and want to invest in and inspire the next-generation of philanthropists. Phili could provide a multiplier effect, while preserving their current giving portfolio. *We are currently meeting with several interested established philanthropists.*

Donations go to an intermediary foundation, which makes grants based on donor advice. Advice comes from the donor, or from the recipient of their charity allowance or gift card. Phili collects a platform fee from the foundation for all donations.

Foundations: Would use the Phili technology to manage “grow the pie” campaigns that find new money. *We are currently meeting with four major national and local foundations that perform both fundraising and grant giving.*

Non-Profits: Can use the Phili platform to increase funding efficiency by targeting segmented and receptive donors, running A/B experiments, and optimizing asks.

6-Month MVP Development Plan

We're following the lean startup methodology. Our plan is to validate our knowledge.

Strategic Plan: Launch “game-like” interface in partnership with a foundation and a strategic donor. Sustain initial user base by building more advanced tools as they become more sophisticated. Design all tech for data collection and experiments.

February: We have launched our first MVP, gifting our own money to classmates. Implemented through SurveyGizmo with no transaction processing, 44% of users committed to match. We will continue future rounds tweaking format and amount of information provided per charity.

March-April: Build more graphical front-end, not branded as a survey site. Integrate payment processing through foundation partners. Determine whether to launch as mobile, browser, or both based on experiments.

May-June: Work with various partners to launch pilot campaigns. Design them so the technology can answer various key questions, such as:

- How often will people match a friend's money?
- How often will people match a stranger's money?
- Does a Bio help?
- Will people donate money even with a platform fee? What fee is sustainable?
- Will users buy gift cards for their friends?
- Will capping choices-per-day keep people coming back to build habits?
- Will people share their “Phili identity” on Facebook?
- Are parents comfortable letting their kids make independent charity choices?

Management Team

The Phili team is comprised of experienced individuals with backgrounds in software engineering, business, legal, finance, marketing and philanthropy fundraising from the WEMBA '40 class. We are also semifinalists in the 2015 Wharton Business Plan Competition.



David Coleman (Chief Technology Officer) is a Senior Director at Novetta, a leading data analytics company in Washington, DC. He has lead teams on more than a dozen technology projects developing large scale web applications, data exploitation services, and analytic front ends. Most recently, Dave has been assisting DARPA and the US Army in establishing a system integration lab for biometric authentication and identification technologies. Dave graduated MIT with an SB Computer Science and Engineering.



Gregory Hagin (Chief Philanthropy Officer) is a Managing Director at CCS, the leading fundraising management and strategic consulting firm to nonprofit organizations worldwide. For more than a dozen years, he has advised organizations with philanthropic targets ranging from \$1 million to more than \$5 billion. He teaches “Skills for Social Impact: Raising Philanthropic Capital” at the University of Pennsylvania. Greg graduated from Boston College and received a certificate in Nonprofit Administration from the University of Pennsylvania.



Carolyn Kim Allwin (Chief Executive Officer) is the CEO and Co-Founder of Fertility Funds, a social impact fund aiming to support women seeking financing for fertility treatments. Previously, Carolyn worked as Tax Counsel at Golden Tree Asset Management as well as Ernst & Young. Carolyn received her B.A. from Johns Hopkins University and has a M.A., J.D. and an L.L.M in Tax. She is admitted to practice law in Massachusetts and New York.