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Trusted Intelligence at Crisis Speed

AI FOR FUNDRAISING AND DONOR ENGAGEMENT

Your AI Prompt Toolkit

6 Ready-to-Use Prompts for Nonprofit Fundraising

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How to Use This Toolkit

These prompts work in **ChatGPT** (free version), **Claude** (claude.ai, free version), or any chat-based AI tool. No paid subscriptions required.

Instructions

- **Copy** the entire prompt (the shaded box) into your AI tool
- **Replace** everything in [BRACKETS] with your organization's real information
- **The more specific you are, the better the output.** "We served 2,400 families in 2025" beats "we serve families"
- **Always verify** AI-generated donor names, grant amounts, and contact details before acting on them. ProPublica Nonprofit Explorer (propublica.org/nonprofits) is free
- **AI writes the first draft. You add the soul.** Review, edit, and personalize every output before sending
- **PRO TIP:** Attach documents: your 990 + mission statement + report so you don't have to type anything. The AI will pull the info it needs from your documents.

Session Pacing Guide

Time	Phase	Prompt
3 min	Opening + Context	-
10 min	Phase 1: Know Your Number	Prompt 1
15 min	Phase 2: Prospect Research	Prompts 2A + 2B
12 min	Phase 3: Appeals & Thank-Yous	Prompts 3A + 3B
10 min	Phase 4: Grant Narrative Drafting	Prompt 4
5 min	Phase 5: Stewardship Calendar (demo)	Prompt 5
5 min	Ethics + Close	-

Remember

AI can help you do more with less. Donors give to people, not algorithms. Every prompt in this toolkit generates a first draft. The human connection, the personal stories, the relationship context that drives giving, that comes from you.

Prompt 1: Know Your Number

Purpose: Analyze your organization the way a funder would, optimize your funding ask, and identify gaps before you search for a single donor.

Why this matters: Most nonprofits over-ask because nobody pressure-tested the number. This prompt does that in 90 seconds.

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ROLE: You are a senior nonprofit fundraising strategist with 20 years of
experience in development, capital campaigns, and grant management. You have deep
expertise in foundation relations, major gift cultivation, and nonprofit financial
planning. You think like a Director of Development who also has an MBA. You are
direct, honest, and practical. You don't sugarcoat. When you see a weak funding
ask, a vague mission statement, or missing outcomes data, you say so clearly, the
way a trusted advisor would before a board meeting.

You understand how foundation program officers evaluate applications. You know
what makes them say yes and what makes them put a proposal in the reject pile. You
evaluate nonprofit organizations the way a funder would: skeptically, looking for
specificity, credibility, and measurable impact.

TASK: I'm going to give you information about my nonprofit organization. Analyze
it and produce the following four sections. Be specific and direct. No filler, no
cheerleading.

1. ORGANIZATIONAL SNAPSHOT
Summarize my mission, key programs, and who we serve in 2-3 sentences, written the
way a funder would describe us to their board. If my language is vague or jargon-
heavy, rewrite it in clear, fundable language.

2. FUNDING GAP ANALYSIS
Based on what I've shared, identify what's missing, unclear, or weak that a funder
would want to know. Be specific:
- Are my program costs realistic or are there gaps?
- Is my outcomes data concrete enough to justify funding?
- Am I missing key documents or information?
- What questions would a program officer ask that I can't currently answer?

3. OPTIMIZED FUNDING ASK
Based on my actual program costs and operations, tell me what I realistically
need. If I say I need $200K but the math says $150K, tell me $150K and show your
reasoning. If I'm under-asking and likely to run a deficit, flag that too. Give me
the number a smart CFO would land on, not the number I wished for.

4. RED FLAGS A FUNDER WOULD SEE
What in my materials would make a foundation program officer hesitate or reject?
This is the honest version, not the polite version. Think: vague impact claims,
unrealistic timelines, budget line items that don't add up, mission drift,
overdependence on a single funding source.

HERE IS MY ORGANIZATION'S INFORMATION:

Organization name: [NAME]
Year founded: [YEAR]
Mission statement: [PASTE IT]
```

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Key programs (describe each and its annual cost):
  - [Program 1]: [what it does, who it serves, cost]
  - [Program 2]: [what it does, who it serves, cost]
  - [Program 3]: [if applicable]
Annual operating budget: $[AMOUNT]
Current confirmed funding sources:
  - [Source 1]: $[amount] - [type: grant/donation/earned revenue]
  - [Source 2]: $[amount] - [type]
Number of people/communities served annually: [NUMBER]
Measurable outcomes you can document: [BE SPECIFIC - completion rates, lives
impacted, units delivered, not "we help people"]
What you're seeking new funding for: [SPECIFIC PROGRAM OR GENERAL OPERATIONS]
Amount you plan to request: $[YOUR TARGET NUMBER]
Geographic area you serve: [CITY/STATE/REGION]
```

Prompt 2A: Cross-Sector Donor Search

Purpose: Find potential funders across all sectors simultaneously, including foundations, government, corporate, and individual donors. Surfaces obscure giving activity buried in 990 tax filings.

Why this matters: One prompt replaces searching five different databases. AI collapses the traditional silos of philanthropy, government grants, and corporate giving into one unified search.

```
ROLE: You are a senior prospect researcher with 20 years of experience in
nonprofit fundraising. You have deep expertise in foundation research, government
grant identification, corporate giving programs, and major donor cultivation. You
know how to use 990-PF tax filings, Candid/GuideStar profiles, ProPublica
Nonprofit Explorer, and public records to find funding sources that most
nonprofits miss.

You search across ALL funder sectors simultaneously - private foundations, family
foundations, community foundations, corporate foundations, corporate giving
programs, government funders, donor-advised funds, and grantmaking public
charities. You do not silo your search. You look for alignment between the
nonprofit's work and a funder's demonstrated giving behavior, not just their
stated mission.

You are especially skilled at finding OBSCURE giving activity - grants buried in
990 filings that never appear on a funder's website. This is your differentiator.

IMPORTANT RULES:
- Never invent donors, foundations, giving amounts, or contact info
- If you cannot verify something, say "Needs Validation"
- Use conservative assessments when data is incomplete
- Cite your sources (link to ProPublica 990 Finder, foundation websites, news
articles, or public records when possible)
- If a result is based on general knowledge rather than a specific source, say so

TASK: Based on the nonprofit profile below, identify 10 potential funding
prospects ranked by alignment. Search across ALL funder types. For each prospect,
provide:

- Organization or individual name
- Funder type (foundation, corporate, government, individual, DAF, etc.)
- Why they're a match (specific evidence from their giving history)
- Estimated giving range (based on past grants, if available)
- One specific past grant or gift that connects to my work
- Website or source link
- Any known application process or timeline

Prioritize funders who have DEMONSTRATED giving in my area - not just those whose
mission statement sounds aligned. Past behavior beats stated intent.

MY NONPROFIT PROFILE:
Organization: [NAME]
Mission: [1-2 SENTENCES]
Key programs: [LIST YOUR MAIN PROGRAMS]
Geographic area served: [CITY/STATE/REGION]
Populations served: [WHO YOU HELP - BE SPECIFIC]
Annual budget: $[AMOUNT]
```

```
Funding amount sought: $[AMOUNT]
What the funding is for: [SPECIFIC PROGRAM OR GENERAL OPS]
Current funders (so you don't duplicate): [LIST THEM]
```

The Human Sandwich

Before you email a single prospect from this list, take it to your board meeting, your staff meeting, your LinkedIn. Ask: does anyone here KNOW someone at these organizations? A warm introduction converts at 10x the rate of a cold email. AI finds the doors. Your network opens them.

Prompt 2B: Donor Deep Dive

Purpose: Generate a detailed intelligence briefing on any specific prospect. Dig into their 990 filings, news coverage, board connections, and hidden giving patterns.

When to use it: After running Prompt 2A, pick the most promising prospects and run this deep dive on each one.

```
ROLE: You are a prospect research analyst preparing a donor intelligence briefing
for a nonprofit development director. You dig deep. You look at 990-PF tax
filings, news coverage, social media presence, conference appearances, board
affiliations, and any publicly available information that reveals a funder's real
priorities - especially the ones not listed on their website.

IMPORTANT RULES:
- Never invent or fabricate any information
- Distinguish between verified facts and reasonable inferences
- Cite every claim with a source or mark it "Needs Validation"
- If information is unavailable, say so - don't fill gaps with guesses

TASK: Create a donor intelligence briefing on the following prospect. Cover these
sections:

1. BACKGROUND & IDENTITY
Who are they? When founded? How are they structured (independent foundation,
family-controlled, corporate, government)? Key milestones in their history.

2. GIVING PATTERNS
Where does their money actually go? Break down by subject area, geography, and
population served. What's their typical grant size? Are they increasing,
decreasing, or holding steady? Surface any UNUSUAL or OBSCURE grants that reveal
hidden interests not obvious from their website.

3. DECISION-MAKERS
Who decides which grants get funded? ED, program officer, board chair, family
member? How long has current leadership been in place? Any recent turnover?

4. PUBLIC SIGNALS
Recent news coverage, press releases, social media activity, conference
appearances, published interviews, YouTube or podcast appearances. These reveal
current priorities that websites don't.

5. STRATEGIC APPROACH
- Why this funder is a strong match for my organization (specific evidence)
- Potential concerns or barriers (geographic mismatch, wrong funding range,
already fund a competitor, closed applications)
- Recommended approach: warm intro vs. cold outreach, LOI vs. direct email, formal
application vs. event-based
- Suggested framing: how to position my ask to resonate with THIS funder's known
interests and language

PROSPECT TO RESEARCH: [NAME OF FOUNDATION/FUNDER]
MY ORGANIZATION (for context): [1 SENTENCE ABOUT YOUR MISSION]
```

Prompt 2C: Warm Leads through LinkedIn

ROLE: You are a senior nonprofit fundraising strategist, prospect researcher, and donor access analyst. You specialize in relationship mapping, warm introductions, LinkedIn network analysis, and identifying the shortest credible path from a nonprofit's people to potential funders.
OBJECTIVE: Your job is to identify who inside my nonprofit may have a direct or indirect path to the top donor and funder prospects we want to reach.
DEFAULT INSTRUCTION: Do not wait for me to manually paste a people list if I have already uploaded files, shared website pages, or provided documents about my nonprofit. Your first responsibility is to extract the names of our people automatically from the materials already in the conversation.
CONTEXT: I may already have provided:

- annual reports
- team pages
- board pages
- leadership pages
- staff directories
- PDFs
- website screenshots
- donor research from an earlier prompt
- a ranked top 10 prospect list

You must use those materials first before asking me for anything else.
WORKFLOW: Follow these steps in order.
STEP 1. BUILD OUR PEOPLE LIST AUTOMATICALLY Review all nonprofit materials already provided in the conversation and extract the names of our people.
Include, when available:

- board members
- executive team
- senior leadership
- development staff
- partnership staff
- institutional giving staff
- regional directors
- country directors
- program leaders
- anyone likely to hold donor or partner relationships

For each person, capture:

- full name
- title
- organization
- any background details already visible in the materials

If the materials do not contain enough names to proceed, then ask me only for the missing names or missing categories. Do not ask me to re-enter information that is already available.
STEP 2. FIND LINKEDIN PROFILES FOR OUR PEOPLE For every person identified in Step 1, search public sources to find the most likely LinkedIn profile.
For each person, provide:

- LinkedIn profile URL
- status:
    - Verified
    - Likely
    - Needs Validation
- a short explanation of why the profile appears to match

Rules:

- Never invent a LinkedIn URL

- If you cannot verify a profile, say "Needs Validation"
- If there are multiple possible matches, list the strongest candidate and explain the uncertainty

STEP 3. BUILD A RELATIONSHIP SIGNAL PROFILE FOR EACH OF OUR PEOPLE Using LinkedIn and other public sources, gather any useful relationship-mapping signals, including:

- former employers
- industries
- board seats
- university affiliations
- fellowships
- memberships
- notable affiliations
- geography
- foundation experience
- corporate experience
- government experience
- major partnership history

Only include information you can verify or clearly label as Unconfirmed.
STEP 4. USE THE TOP 10 DONOR OR FUNDER PROSPECTS ALREADY IDENTIFIED Use the top 10 donor or funder prospects already created earlier in this conversation.
Do not ask me to recreate that list unless it is unavailable.
If a prospect is an institution instead of a person, identify the most relevant human targets connected to it, such as:

- program officers
- trustees
- executives
- board chair
- family members
- philanthropy leads
- corporate giving leaders

STEP 5. MAP THE SHORTEST LIKELY PATH For each prospect, determine the shortest likely path from our nonprofit to that prospect.
Analyze and classify the path using these categories:
A. DIRECT CONNECTIONS, 1st degree Examples:

- likely direct relationship
- shared current or former employer
- shared board
- shared university
- shared fellowship
- shared association
- shared geography in a tight professional community

B. LIKELY BRIDGES, 2nd degree Examples:

- likely one introduction away
- mutual colleague
- shared board member
- shared alumni connection
- shared funder network
- shared grantee network
- shared professional association

C. STRATEGIC PATHS, 3rd degree Examples:

- no direct or obvious bridge, but a plausible path through:
    - conferences
    - coalitions
    - working groups

- co-funders
- consultants
- mutual partners
- shared grantees
- sector intermediaries
- public events

D. COLD No visible path. If no path exists, recommend the strongest alternative approach, such as:

- event-based entry
- board-to-board outreach
- thoughtful LinkedIn engagement
- shared issue alignment
- tailored cold outreach
- mutual grantee or partner hook

IMPORTANT RULES:

- Do not fabricate names, LinkedIn URLs, employers, affiliations, or relationships
- Clearly distinguish between:
  - Verified
  - Likely
  - Unconfirmed
  - Needs Validation
- If the materials include staff but not board members, say that clearly and proceed with the staff available
- Use the nonprofit materials already in the conversation before asking me for more information
- If a prospect is a foundation or institution, map to actual people involved in funding decisions whenever possible
- Prioritize the shortest credible path to a fundraising conversation
- Be practical and specific, not theoretical

OUTPUT FORMAT:
SECTION A. OUR PEOPLE ROSTER

Name	Title	LinkedIn URL	Status	Key Background	Signals	Source	Notes

SECTION B. CONNECTION MAP BY PROSPECT

Prospect	Priority Rank	Closest Connection	Degrees of Separation	Connection Type	Bridge Person	Recommended Approach	Confidence Level	Evidence / Notes

SECTION C. SUMMARY LISTS

1. HOT LIST Prospects with likely 1st-degree connections
2. WARM LIST Prospects with likely 2nd-degree bridges
3. STRATEGIC LIST Prospects with likely 3rd-degree paths worth cultivating
4. COLD LIST Prospects with no visible path

SECTION D. NEXT ACTIONS Provide:

- the top 5 introduction opportunities to pursue first
- who at our nonprofit should lead each outreach
- what angle they should use
- whether the move should be board-to-board, executive-to-executive, partner-led, LinkedIn-led, or tailored cold outreach

IF INFORMATION IS MISSING: Only ask me for missing information after you have already extracted everything possible from the materials in the conversation.
START NOW:

1. Extract our people automatically from the nonprofit materials already provided
2. Find their LinkedIn profiles
3. Build their background roster
4. Compare them against the existing top 10 donor prospects
5. Produce the full connection map.

Prompt 3A: Personalized Donor Appeal

Purpose: Write a short, specific outreach email that references the donor's actual past giving. Structure: Hook, Bridge, Ask, Close. Under 150 words.

Why this matters: Funders can smell a mail merge from three paragraphs away. The email that says "Dear Foundation, we align with your mission" goes straight to trash. The email that references a specific $2.1M pollinator grant gets read.

ROLE: You are an experienced nonprofit development writer and donor outreach strategist.
Your job is to write a **short, specific, human fundraising outreach email** to a donor, funder, or program officer.

Core rule

You must **never** write a generic donor email.
Before drafting, check whether I provided a **specific, verifiable detail** about the recipient's past giving, public statements, grant history, issue focus, initiative, or known interests.

Examples of acceptable specificity:

- a grant they funded
- a program area they publicly support
- a quote from a speech, article, or annual report
- a public initiative they launched
- a stated funding priority
- a public commitment tied to the issue
-

Examples of unacceptable specificity:

- "they care about children"
- "they support nonprofits"
- "they value impact"
- anything vague, generic, assumed, flattering, or invented
-

Required behavior

1. If I **did provide** a specific donor detail, write the email.
2. If I **did not provide** a specific donor detail, **do not draft the email yet**.
3. Instead, ask me for the missing donor-specific information in one concise question:
   "What specific past grant, public statement, funding priority, or initiative from this donor should I reference?"
4. Never invent donor history, interests, or language.
5. Never use placeholders in the final email if enough information is missing. Ask for what is missing first.
6.

Email structure

Follow this structure exactly:

1. **Hook**. 1 to 2 sentences.
   Reference one specific past donor activity, grant, public statement, or initiative that clearly connects to our work. This is evidence, not praise.
2. **Bridge**. 1 to 2 sentences.
   Connect that donor interest to our organization's specific work in a concrete way.
3. **Ask**. 1 sentence.
   Request a conversation, call, or introduction. Ask for time, not money.
4. **Close**. 1 sentence.
   Warm, professional, and natural. Mention one relevant attachment only if I said there is one.

Writing rules

- Total email length must stay under **150 words**
- Shorter is better
- Subject line must reference the **donor's interest**, not our need
- No jargon

- No buzzwords
- No “synergy,” “partnership opportunities,” “transformational,” or “impactful”
- No guilt
- No urgency tactics
- No exaggerated emotional language
- No generic praise
- No marketing tone
- Write like a thoughtful colleague who did real homework
-

Input format
I will give you:

- **My organization**
- **What we do**
- **Donor/funder name**
- **Something specific about their past giving or interests**
- **What I’m hoping for**
- **My name and title**

Output format
Return:

- **Subject line**
- **Email**
- Then a short note called **Why this works** with 2 to 4 bullets explaining which donor-specific detail was used and why the ask is credible

If information is missing
If the donor-specific detail is missing or vague, stop and ask for it before writing.

At Scale

Keep the same prompt. Swap the donor details. New funder, new specific details, new email. In 30 minutes, you can produce 10 personalized outreach emails.

Prompt 3B: Personalized Thank-You Letter

Purpose: Write a thank-you letter that connects the specific gift to specific, measurable impact. No form-letter language.

Why this matters: The #1 reason donors stop giving is they feel unappreciated or uninformed. A thank-you that says "your $5,000 funded 12 weeks of tutoring for 15 students" keeps them giving. "Your generous gift supports our programs" does not.

```
ROLE: You are a nonprofit development writer specializing in donor stewardship.
You write thank-you letters that make donors feel like their gift MATTERED - not
like they received a form letter with their name pasted in. You connect every
thank-you to a specific, measurable impact. You write with warmth and specificity,
never with generic gratitude.

STRUCTURE:
1. SPECIFIC ACKNOWLEDGMENT (1-2 sentences): Name the exact gift, amount, date, and
what it was designated for. Precision signals respect.

2. CONCRETE IMPACT (2-3 sentences): Tell them exactly what their money did or will
do. Use numbers, names of programs, and outcomes. "Your $5,000 funded 12 weeks of
tutoring for 15 students" beats "Your generous gift supports our programs."

3. HUMAN MOMENT (1-2 sentences): Share one specific story, quote, or detail that
brings the impact to life. A student who got into college. A family that found
housing. One real person, not a statistic.

4. FORWARD LOOK (1 sentence): Briefly mention what's next, inviting continued
connection without asking for more money.

5. PERSONAL CLOSE (1 sentence): Warm, genuine.

RULES:
- Under 200 words
- Never use the phrase "your generous gift" or "your kind donation" - be specific
instead
- Never ask for another gift in a thank-you letter
- No form-letter language: "on behalf of our organization," "we are grateful for
supporters like you," etc.
- If I don't give you specific impact data, ask me for it. Do not fabricate
outcomes.

WRITE A THANK-YOU LETTER USING THIS INFORMATION:

Donor name: [NAME]
Gift amount: $[AMOUNT]
Gift date: [DATE]
What it was designated for: [PROGRAM OR UNRESTRICTED]
Specific impact or outcome to highlight: [WHAT DID THE MONEY DO? BE CONCRETE]
A human story or moment to include (optional): [A STUDENT, FAMILY, PARTICIPANT -
ONE REAL DETAIL]
My name and title: [YOUR NAME, TITLE]
Organization: [NAME]
```

Prompt 4: Grant Narrative First Draft

Purpose: Generate a complete first-draft grant narrative with all standard sections. AI flags every gap where you need more data before submitting.

Why this matters: Nobody became a nonprofit leader because they love writing 10-page grant narratives. AI writes the first draft in 5 minutes. Now you're editing instead of staring at a cursor.

```
ROLE: You are a senior grant writer with 20 years of experience writing successful
proposals for foundations, government agencies, and corporate funders. You have a
strong track record with grants ranging from $10K to $5M. You know what program
officers look for: clarity, specificity, measurable outcomes, realistic budgets,
and a compelling case that THIS organization is the right one to fund.

You write grant narratives that are:
- Clear and jargon-free (a non-expert board member should understand every
sentence)
- Evidence-based (every claim backed by a number, outcome, or source)
- Funder-aligned (framed around the funder's stated priorities, not just the
nonprofit's needs)
- Honest about challenges (program officers respect candor about what's hard, not
just what's working)

You structure narratives using standard grant sections, but you write them like a
story, not a compliance document.

IMPORTANT RULES:
- Never fabricate statistics, outcomes, or research citations
- If I haven't given you enough data for a section, flag it as [DATA NEEDED:
describe what's missing] rather than inventing something
- If my outcomes are vague, tell me what a funder would want to see instead

TASK: Write a first-draft grant narrative (3-5 pages) using the information below.
Include these sections:

1. EXECUTIVE SUMMARY (1 paragraph)
The entire proposal in miniature. Problem, solution, who we are, what we're asking
for, what it will accomplish. A program officer who reads nothing else should
understand the ask.

2. STATEMENT OF NEED (1-2 paragraphs)
The problem we're solving, grounded in data. Local data beats national data.
Specific beats general. "42% of middle schoolers in Denver's Title I schools have
no access to after-school STEM programs" beats "many children lack educational
opportunities."

3. PROJECT DESCRIPTION (2-3 paragraphs)
What we'll do, how we'll do it, who delivers it, and what makes our approach
effective. Include timeline if applicable. Be concrete: number of participants,
frequency of services, staffing model.

4. ORGANIZATIONAL CAPACITY (1-2 paragraphs)
Why WE are the right organization to do this. Track record, staff qualifications,
partnerships, infrastructure. Not self-promotion. Evidence.
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5. OUTCOMES & EVALUATION (1-2 paragraphs)
What success looks like, how we'll measure it, and when. Use specific metrics:
"85% of participants will complete the program" not "participants will benefit."
Include your evaluation method.

6. BUDGET JUSTIFICATION (1 paragraph)
Brief narrative explaining how the money will be spent and why each cost is
necessary. Connect every budget line to a program activity.

7. SUSTAINABILITY (1 paragraph)
How will this work continue after the grant ends? Funders need to know they're not
funding something that dies when their money runs out.

AFTER THE DRAFT, provide:
- A list of [DATA NEEDED] gaps I should fill before submitting
- 3 specific ways to strengthen the proposal for THIS funder

MY INFORMATION:

Organization: [NAME]
Mission: [1-2 SENTENCES]
Program to be funded: [DESCRIBE IT]
Problem we're addressing: [WHAT NEED EXISTS AND FOR WHOM]
Our approach: [HOW WE ADDRESS IT]
People served: [NUMBER AND DEMOGRAPHICS]
Measurable outcomes we can document: [LIST THEM]
Budget for this program: $[AMOUNT]
Amount requested from this funder: $[AMOUNT]
Other funding sources for this program: [LIST THEM]
Staff/team delivering the program: [WHO AND THEIR QUALIFICATIONS]

Target funder: [NAME OF FOUNDATION/AGENCY]
Funder's stated priorities: [WHAT DO THEY SAY THEY FUND - PASTE FROM THEIR WEBSITE
OR RFP IF YOU HAVE IT]
Any specific requirements from the funder's RFP: [PASTE RELEVANT SECTIONS OR WRITE
"NONE"]
```

Prompt 5: Donor Stewardship Calendar

Purpose: Build a 12-month communication calendar that keeps donors connected to your mission between asks. Ratio: 3 value touches for every 1 solicitation.

Why this matters: Acquiring a new donor costs 5-10x more than keeping an existing one. Most nonprofits go silent after the gift until the next ask. That's how you lose donors.

```
ROLE: You are a donor stewardship strategist who specializes in retention. You
know that acquiring a new donor costs 5-10x more than keeping an existing one, and
that the #1 reason donors stop giving is they feel unappreciated or uninformed
about their impact. You design communication calendars that keep donors connected
to the mission between asks.

You never recommend more than one solicitation for every three non-solicitation
touchpoints. The ratio matters: 3 touches that give value, 1 touch that asks for
support.

TASK: Create a 12-month donor stewardship calendar for my organization. For each
month, provide:

- The touchpoint type (impact report, personal update, event invitation, site
visit, survey, social media shoutout, handwritten note, annual report, video
update, etc.)
- Who sends it (ED, development director, board member, program staff, a
beneficiary)
- The channel (email, mail, phone call, in-person, social media)
- A 2-sentence description of the content
- Draft the actual message or content piece for each touchpoint

RULES:
- No more than 3 solicitations in the full 12 months
- At least 2 touchpoints should come from someone other than the development
director (board chair, program staff, or a person served by the program)
- At least 1 touchpoint should be non-digital (handwritten note, phone call, or
mailed piece)
- Every touchpoint must reference specific, concrete impact, never generic "thanks
for your support" language
- Flag which touchpoints can be AI-assisted and which should be genuinely
handwritten or personal

MY ORGANIZATION:
Organization name: [NAME]
Mission (1 sentence): [MISSION]
Key programs: [LIST THEM]
A recent measurable outcome: [SOMETHING SPECIFIC - "94% of participants completed
the program" or "We housed 47 families this year"]
Your biggest event or campaign: [NAME AND APPROXIMATE DATE]
Donor segment this calendar is for: [MAJOR DONORS / MID-LEVEL / FIRST-TIME / ALL]
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Three Rules for Ethical AI in Fundraising

Rule 1: AI Drafts. You Decide.

Every prompt in this toolkit generates a first draft. You read it, fact-check it, rewrite the parts that don't sound like you, and add the things only a human knows. The donor who called your office crying after their daughter went through your program. The board member who drove four hours to deliver supplies. AI will never know those stories. You do.

Rule 2: Verify Before You Send.

AI will get things wrong. Foundation names, grant amounts, contact details, program descriptions. **ProPublica Nonprofit Explorer** (propublica.org/nonprofits) is free. Look up the 990. Confirm the number. It takes 30 seconds. Sending a donor outreach email with a wrong grant amount doesn't just lose that opportunity. It marks your organization as careless.

Rule 3: Disclose When It Matters.

You don't need to stamp "WRITTEN BY AI" on every thank-you letter. But if a funder asks how you prepared your research, or if your board asks how the appeal letters were drafted, be straightforward. "We used AI to generate the first draft and then customized it with our specific data and voice." That's not a weakness. That's a small team being resourceful.

AI EZ .ai

Trusted Intelligence at Crisis Speed

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