

AI for Fundraising and Donor Engagement

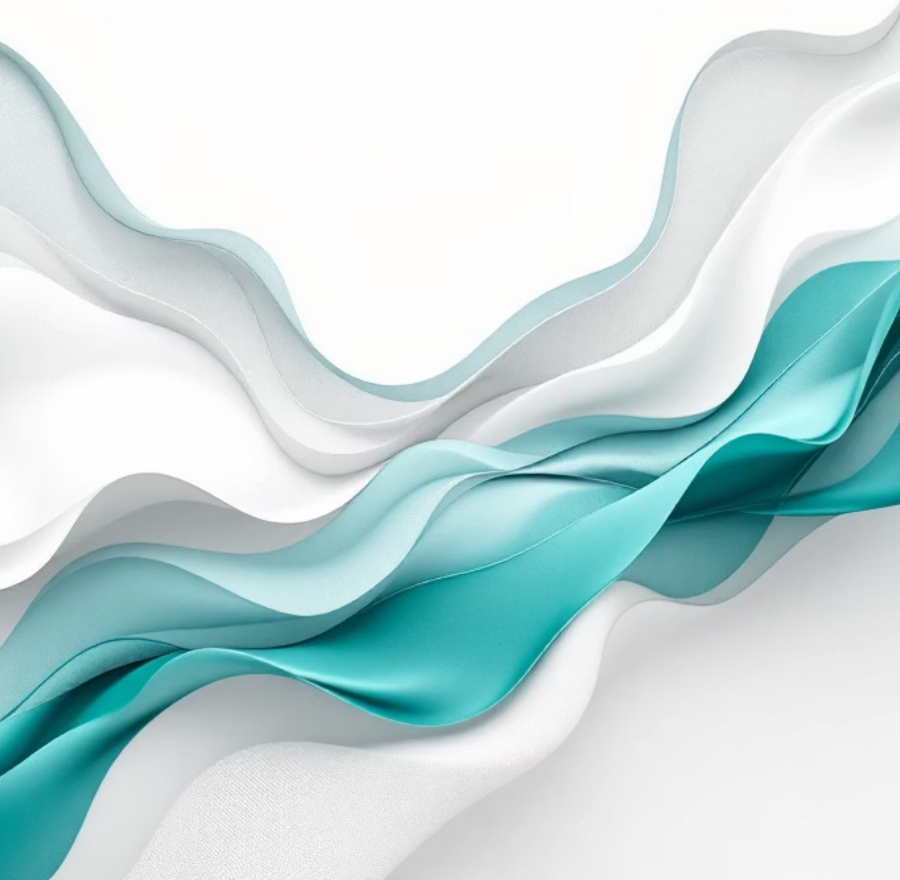
Deborah Sherman | AIEZ.ai

Colorado Nonprofit Association 2026



AIEZ.ai

Trusted Intelligence at Crisis Speed



About Deborah Sherman

- Owner of [AIEZ.ai](#) in Denver.
 - We design AI workflows, deliver training and create governance for anyone navigating the AI era.
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- Founded + board chair of Denver nonprofit KidsGiving365
 - Served on nonprofit boards: Juvenile Assessment Center + the Mesa Verde Foundation
 - Former Investigative Reporter for NBC News stations including 9NEWS in Denver (13+ NATAS Emmy Awards)
 - Transitioned to crisis communications > head of communication for the Federal Bureau of Investigation in Colorado and Wyoming.
 - Opened a PR firm > Early adopter of AI.
 - **CERTIFICATIONS**
 - AI Strategy for Business, [Cornell University](#), March 2026
 - AI Mastery by MindValley, Feb 2026: Globally accredited through The CDP Group.
 - Certified AI Workflow Consultant, IWAI 2025
 - Certified Agentic Builder L1-MindStudio 2025

Undonated Dollars

- **Corporate Matching**
 - \$6–\$10 billion in corporate matching gifts go unclaimed every year.
 - 10% of donations are eligible for a corporate match. Only 1.31% ever get one.
- **U.S. foundations**
 - Gave \$109 billion in 2024, which was 19% of all charitable contributions, surpassing the \$100B mark 3 years in a row.
 - They hold \$1.64 trillion in unused assets.
 - The average private foundation pays out only 7.1% of its assets annually.
 - Larger foundations average just 5.2% pay out annually.
- **Donor-advised funds**
 - Average payout rate of 23.9% in 2023
 - About \$190B in DAF assets undistributed

Sources: Foundation Source / Candid, 2025 Report on Private Philanthropy + GrantStation, 2024 State of Grantseeking + Giving USA 2025 / Stelter

Note: Foundations are legally required to distribute 5% annually.





The #1 barrier to successful grantseeking is the inability to find opportunities that match your specific mission, location, and programs.

-Source: GrantStation, 2024 State of Grantseeking

#1 Challenge

Lack of time and staff

#2 Challenge

Finding matching grant opportunities

Show me the money!

6 Prompts. 60 Minutes. Zero
Subscriptions Required.

Works in ChatGPT (free) or Claude (free).

The Toolkit

01	02	03
Know Your Number	Find the Right Doors	Go Deep on Any Prospect
04	05	06
Write Outreach That Gets Read	Thanks That Keep Them Giving	Ethics
07		
Stewardship All Year		

WHAT THIS TRAINING IS NOT



How to reduce hallucinations + get accurate results



The importance of governance



How to prompt



The best AI tools to use and why

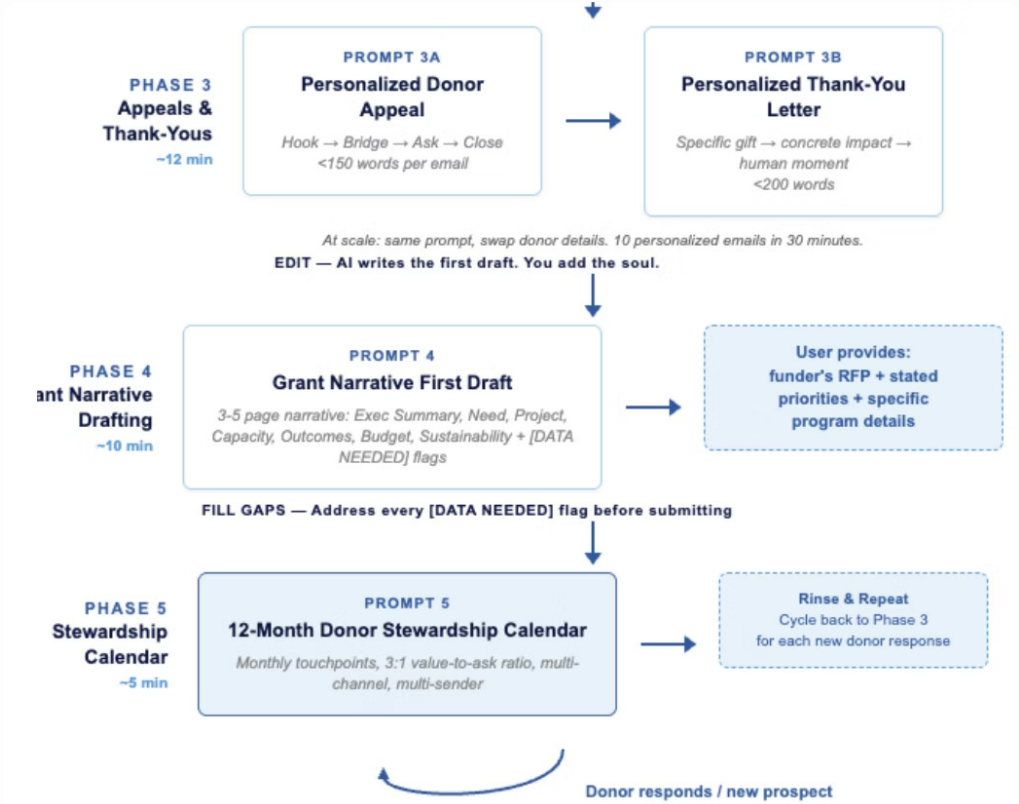
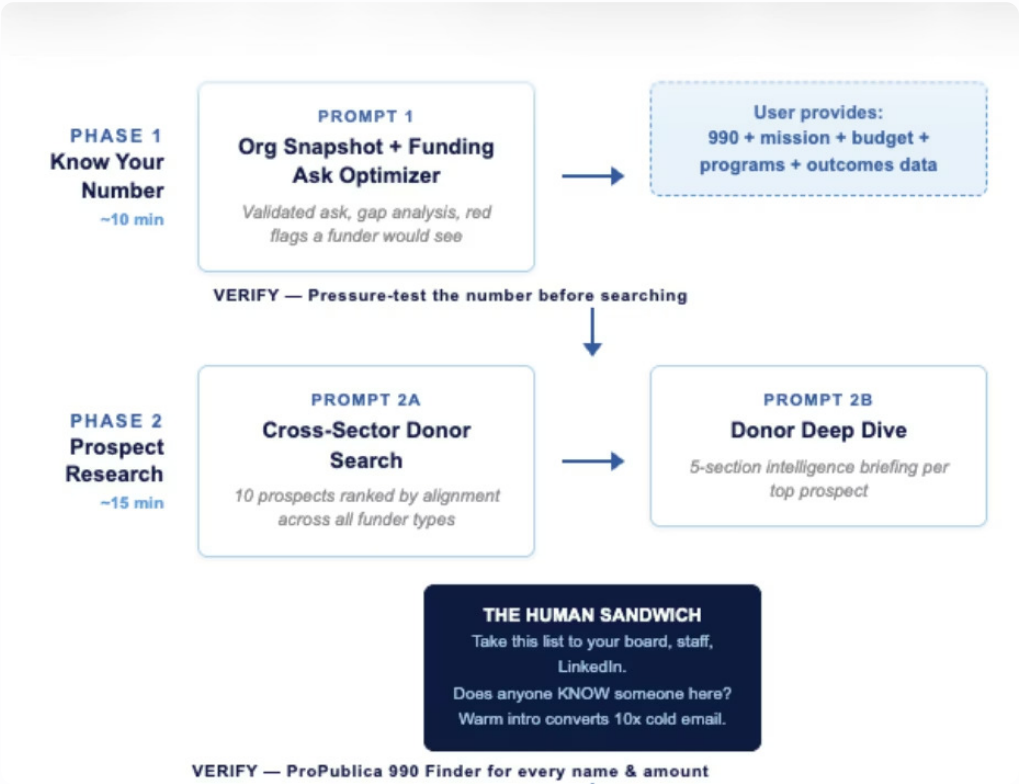


The future of AI and job loss



How to keep donor data secure

YOUR DONOR + FUNDRAISING AI WORKFLOW



PROMPT 1

Know Your Number

Before you search for a single donor, find out if your funding ask is even right.

Most nonprofits over-ask or under-ask because nobody pressure-tested the number against actual program costs, funding gaps, and what a funder's CFO would calculate independently.



What this prompt gives you

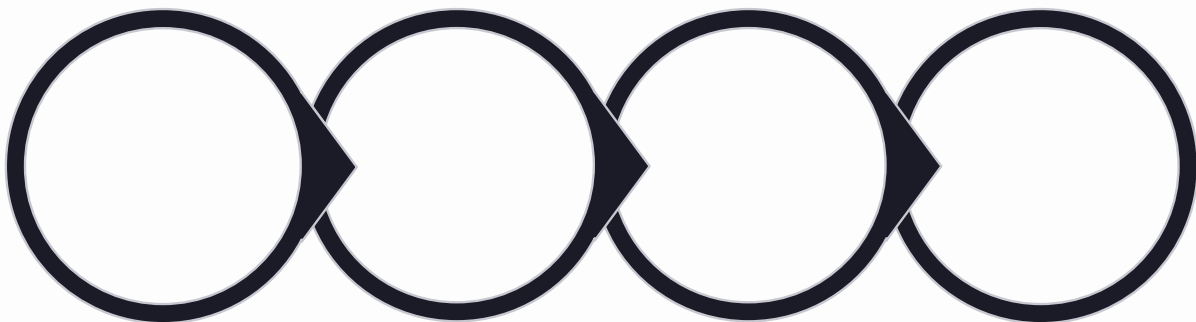
Organizational snapshot

Funding gap analysis +
optimized ask

Red flags

AI analyzes everything, identifies gaps, and provides your *real* funding number before you search for a donor.

TRY IT NOW



PRO TIP: Upload your 990 and annual report instead of typing in your information. If they're not handy, this prompt will ask for the information.



#Prompt 1 - Know your number

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?
1. 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.
2. 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] 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]

An abstract graphic on the left side of the slide, featuring flowing, wavy lines in various shades of blue and white, creating a sense of movement and depth.

PROMPT 2A

Find the Right Doors

One prompt searches foundations, government, corporate giving, individual donors, and DAFs **simultaneously**.

No more searching five databases one at a time.

Candid reports roughly **90% of private foundations don't have a website**. Their 990-PF is literally the only public record of who they fund.

AI can find grants buried in 990 tax filings that never appear on a funder's website.

REAL EXAMPLE

Hidden in Plain Sight

A \$250,000 grant you can only find in a tax filing.

Adolph Coors Foundation

Denver, CO | \$207M in assets | EIN: 51-0172279

\$250,000 to Boston Children's Hospital

Source

IRS Form 990-PF

Filing Year

FY ending Nov 2023

Found via

ProPublica Nonprofit Explorer

Why it's hidden: The foundation's website (adolphcoors.org) returns an SSL error. No public grants page exists. The 990-PF is the **only public source** for this information.

#Prompt 2A - Cross-sector donor 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]

PROMPT 2B

Go Deep on Any Prospect

Giving Patterns

Decision-Makers

Public Signals

Hidden Grants

Strategic Approach

For your top picks, AI builds a full intelligence briefing — everything you need before you make contact.

#Prompt 2B – Donor Deep Dive

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

1

AI Finds the Doors

2

Finds LI Connections

3

Warm Intro Converts at 10x the rate

Take the prospect list to your board. Check LinkedIn. Ask: does anyone here **know** someone at these organizations? Warm introductions convert at **10x the rate** of cold email.

#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

Outreach That Gets Opened

1

Hook

Reference their specific past giving

2

Bridge

Connect it to your program

3

Ask

A conversation, not a check

4

Close

Warm. One attachment. Done.

Under 150 words. Every time.

The Email That Works

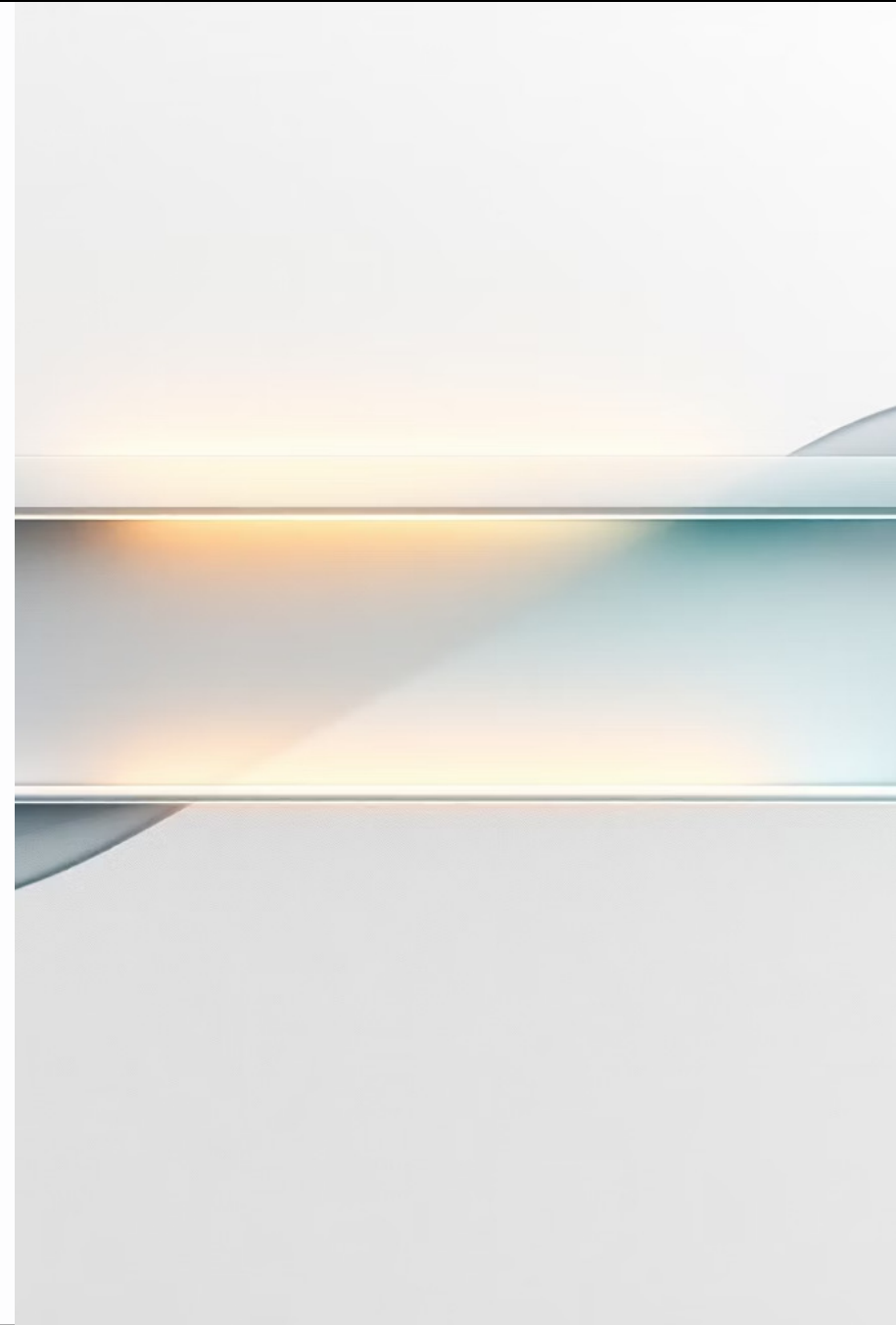
✓ Gets Read

"Your pollinator work at Holly Farms — a shared mission"

☐ Gets Deleted

"Partnership opportunity with [Organization Name]"

The difference is
specificity.



#Prompt 3A - Personalized donor appeal

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:
 4. "What **specific** past **grant**, public statement, funding priority, **or** initiative **from** this donor should I reference?"
 5. Never invent donor history, interests, **or** language.
 6. Never use placeholders **in** the **final** email if enough information **is** missing. Ask **for** what **is** missing first.

Email structure
Follow this structure exactly:

1. Hook. **1 to 2** sentences.
 2. Reference **one specific** past donor activity, **grant**, public statement, **or** initiative that clearly connects **to** our work. This **is** evidence, **not** praise.
 3. Bridge. **1 to 2** sentences.
 4. **Connect** that donor interest **to** our organization's **specific** work **in** a concrete way.
 5. Ask. **1** sentence.
 6. Request a conversation, **call**, **or** introduction. Ask **for time**, **not** money.
 7. Close. **1** sentence.
 8. 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.

Personalized Donor Appeal

Subject: Your investment in middle school girls' STEM access in Denver

I saw the Patel Family Foundation's 2024 \$350,000 support for a Denver Public Schools STEM mentoring program focused on middle school girls from low-income families. That stood out because it backed practical access early, not just aspiration.

At Water For People, we work to build reliable water and sanitation systems that last, and that work includes schools and health facilities in the communities we serve. We care a lot about what it takes for girls to participate fully in school, stay healthy, and have real opportunity over time.

Would you be open to a brief call to compare priorities and see whether there may be a fit?

Warmly,

Mark Duey CEO, Water For People

PROMPT 3B

Thank-Yous That Matter

Keeps Them Giving

"Your \$5,000 funded 12 weeks of tutoring for 15 students."

Doesn't

"Your generous gift supports our programs."

Specificity is the difference between a one-time donor and a lifelong partner.

Why Donors Stop Giving, and How to Keep Them

Understanding donor behavior is crucial for building lasting relationships. Research highlights key reasons why donors disengage and what truly fosters loyalty.

Reasons Donors Stop Giving

Worsening Finances

Approximately 20% of donors stop due to their own financial constraints (Adrian Sargeant's research).

No Clear Reason

A significant portion stop giving without a specific, stated reason, indicating a lack of strong engagement.

Alternative Support

Donors may switch their support to another charitable organization.

Keys to Sustained Donor Loyalty



Meaningful Acknowledgment

Show genuine appreciation that resonates with their specific contribution.



Impact Reporting

Clearly demonstrate the tangible results of their giving (Penelope Burk's *Donor-Centered Fundraising*).

#Prompt 3B - Personal thank-yous

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.

1. 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."
2. 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.
3. FORWARD LOOK (1 sentence): Briefly mention what's next, inviting continued connection without asking for more money.
4. 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]

Personal Thank-You

Subject: Thank you for your 2026 investment in safe water at school

Dear Patel Family Foundation,

Thank you for your \$350,000 gift in 2026 designated for fresh water in public schools. That investment directly supported safer drinking water for students and helped reduce exposure to lead in the school day.

Because of this funding, children had access to cleaner water at school, which meant a healthier environment for learning and one less hidden risk standing between them and the classroom. Safe water sounds basic. It is. That is exactly why it matters. When students can drink from the fountain without worry, schools work the way they are supposed to.

What stays with us is the simple picture behind this gift: students filling their bottles, teachers knowing the water is safe, and families carrying one less concern into the day.

We look forward to keeping you updated as this work continues in more schools.

Warmly, John Smith Water Foundation

At Scale

10

Personalized Emails

In 30 minutes

50

Thank-Yous After Your Gala

In one afternoon

AI does the first draft. **You add the soul.**



PROMPT 4

Kill the Blank Page

AI writes a complete grant narrative first draft in **5 minutes**.

Executive Summary	Statement of Need
Project Description	Outcomes
Budget	Sustainability

You're **editing** instead of staring at a cursor.



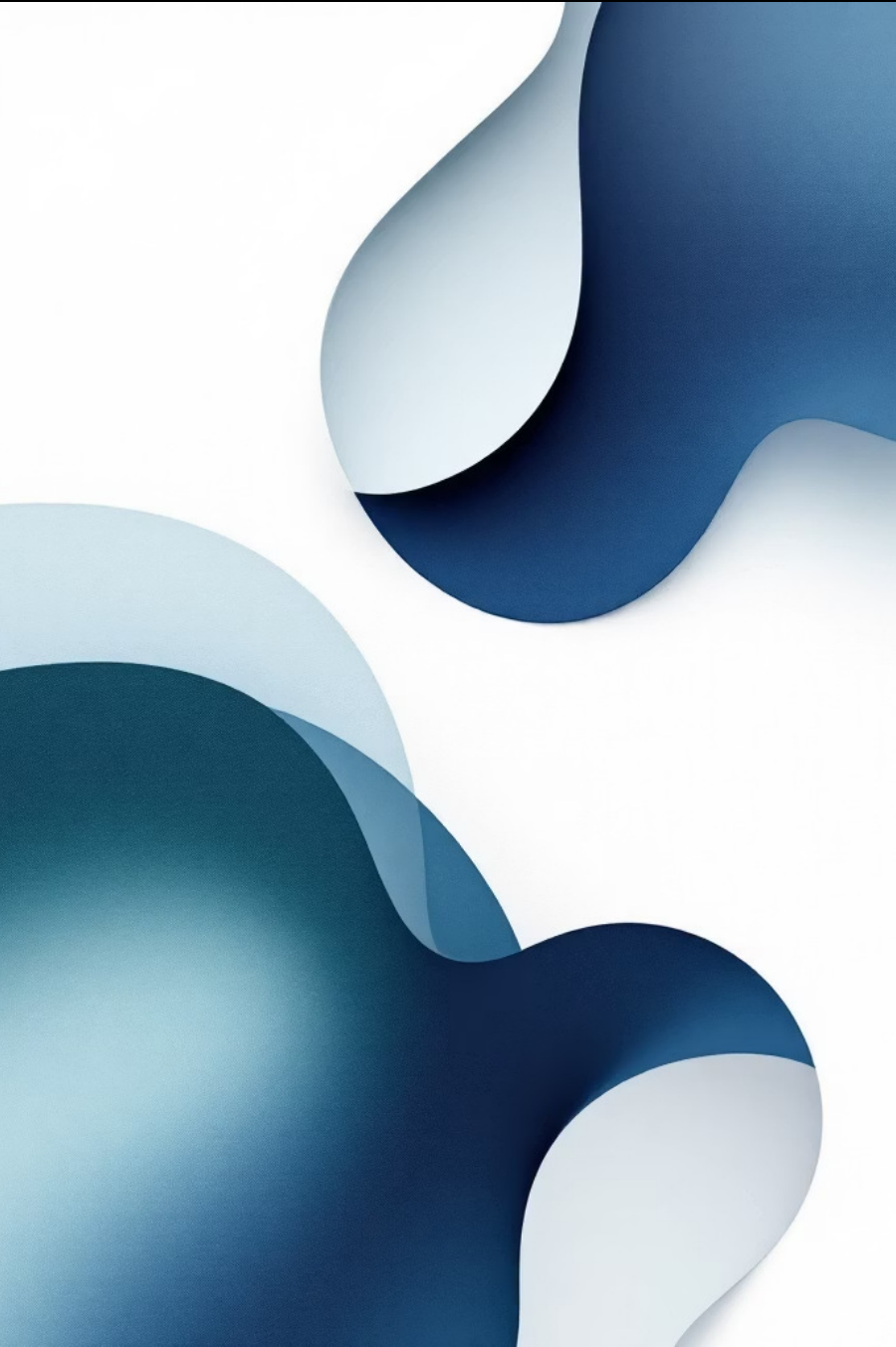
The Killer Feature

The AI flags every gap **before you submit**.

"You mention STEM labs but don't describe the curriculum."

"No evaluation method specified."

Think of it as a free program officer review.



The Alignment Trick

1

Collect funder priorities
Paste exact language from call

2

Highlight key phrases
Identify goals and metrics

3

Show your objectives
State your project's aims

4

Use AI to reframe
Translate aims into funder terms

5

Maintain authentic fit
Align intent, not mimicry

Not parroting. **Alignment.**

Prompt 4- Grant narrative first draft

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. 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]

PROMPT 5

Keep Them Giving All Year

12-Month Calendar

Stewardship mapped across the full year

3:1 Ratio

3 value touches for every 1 ask

Mix of Channels

Mix of senders. Drafted content for each month.

Acquiring a new donor costs **5–10x more** than keeping one.



Prompt 5- Donor Stewardship Calendar

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]

Water For People - 12-Month Donor Stewardship Calendar

Segment:	All annual donors				Solicitations:	Non-solicitation touches:	10
Month	Touchpoint Type	Sender	Channel	AI / Personal	2-Sentence Description	Draft Message / Content Piece	
January	New-Year Impact Update	Mark Duey, CEO	Email	AI-assisted	Open the year with proof, not platitudes.	Subject: What your support made possible last year Last year, Water For People helped reach 521,258 people with new or improved water services, 638,072 with improved sanitation services, and 484,820 with hygiene education. That work also helped bring improved water, sanitation, and hygiene access to 233 schools and 55 health	
February	Handwritten Note	Board Chair or Board Member	Mail	Personal	Add a real human touch early in the year.	Dear [First Name], I wanted to send a quick note because your support helped make very concrete progress possible last year. Water For People reported 748 communities with new or improved water services, and that kind of long-term infrastructure only happens when donors stay with the work.	
March	Program Update	Program Staff or Regional Director	Email	AI-assisted	Give substance between appeals.	Subject: What lasting water access looks like on the ground When people hear “water access,” they often picture a single new tap. Our teams measure something harder. Whether systems keep working for families, schools, and clinics over time.	
April	Donor Survey	Kate Verlaan, Chief Growth Officer	Email	AI-assisted	Ask donors what they want more of between solicitations.	Subject: One quick question about the updates you receive You’ve helped support work that reached 233 schools and 55 health clinics with improved water, sanitation, and hygiene access last year. As we plan future donor updates, I’d love to know what would be most useful to you: short field stories, program results, behind-the-scenes	
May	Spring Giving Appeal	Development Director	Email	AI-assisted	First solicitation of the year.	Subject: Help extend reliable water access to more schools and clinics Last year, Water For People helped improve water, sanitation, and hygiene access in 233 schools and 55 health clinics. That progress matters because schools and clinics cannot do their jobs without safe, reliable services.	
June	Field Video Update	Country Director or Regional Director	Email + Video	Mixed	Put a voice and face to the work.	Subject: A two-minute update from the field I wanted to share a brief video from our team about what it takes to keep water systems working after construction ends. Our approach is built around “Everyone Forever,” which means the goal is not just new access, but lasting services for households, schools, and clinics.	
July	Stewardship Phone Call	Board Member	Phone	Personal	Pure retention. No ask.	Hi [First Name], this is [Board Member Name] from Water For People. I’m calling just to thank you personally for being part of work that helped reach 521,258 people with improved water services last year. I’m not calling to ask for anything. I just wanted you to hear from a real person that your support is noticed, and it matters.	

June

Touchpoint type: Short donor-impact video

Who sends it: Country director or regional director

Channel: Email linking to video

AI-assisted or personal: AI-assisted scripting, human-recorded video

Content description: A short video gives donors a face and voice from the field. It should explain one specific program reality in plain language.

Draft message:

Subject: A two-minute update from the field

I wanted to share a brief video from our team about what it takes to keep water systems working after construction ends. Our approach is built around “Everyone Forever,” which means the goal is not just new access, but lasting services for households, schools, and clinics.

Your support helps fund work that communities and local governments can sustain. That is slower than a [ribbon-cutting](#). It is also what lasts.

Best,

[Country Director Name]



August

Touchpoint type: Mailed postcard with program photo and metric

Who sends it: Program team

Channel: Mail

AI-assisted or personal: AI-assisted draft, mailed piece should be designed and signed by hand if possible

Content description: Physical mail breaks through digital fatigue. Keep it visual, brief, and anchored in one memorable number.

Draft postcard copy:

Front:

748 communities with new or improved water services last year.

Back:

That number represents real places, real systems, and real people who can count on water where they live. Thank you for helping make work like this possible through Water For People.

Signed, [Program Team Signature]





RULE 1

AI drafts. You decide.

Every output is a first draft. The stories, the relationships, the context — that comes from you.

RULE 2

Verify before you send.

AI gets things wrong. **ProPublica Nonprofit Explorer is free.** Look up the 990PF. Confirm the number. 30 seconds.



RULE 3

Disclose When It Matters

"We used AI to generate the first draft, then customized it with our data and voice."

That's not weakness. That's a small team being *resourceful*.

What You're Taking Home

- ☐ 6 prompts. Ready to copy and paste
- ☐ From finding your ask....to scheduling thank-yous
- ☐ Save you hours of research and work



One More Thing

What you did today works. But you had to copy and paste in each prompt and information about your organization manually.

What if you uploaded your 990 once, filled out your intake once, and the whole workflow ran in sequence?

TrueProspect
Donor Finder

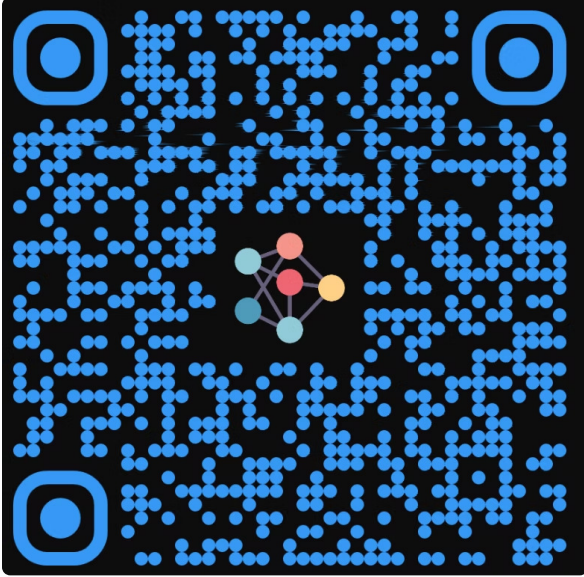
The engine underneath
every prompt you used
today.

Founding Early Access

It's not ready for sale yet. I'm looking for
two people to Beta testers - use it for free
and tell me if there are any glitches.

Deborah@AIEZ.ai





SCAN THE QR CODE FOR:

- This presentation
AI for donor engagement + fundraising
- The 6 prompts
to know your funding number, to finding donors to drafting grant narratives
- A deep research report
about how nonprofits across the United States are using AI today
- Plus free AI tools!
How to spot AI images How to detect deepfake voices

Thank you!