A Nonprofit Professional's Guide to

Incorporating AI

Kindsight

AI tools have exploded into the mainstream, offering hope of *'doing more with less.'*

But new technologies can be daunting.

This ebook aims to provide a foundational understanding of AI and the process of incorporating it into your workflows to help boost your fundraising efforts.

Contents

In collaboration with Mallory Erickson and Cherian Koshy.

Introduction

We've all felt the effects of the rapidly changing philanthropic landscape and our evolving digital world. Most nonprofit professionals wear multiple hats and often feel the stress and strain of striving to reach goals that grow year over year. Meanwhile, the emergence of AI tools into mainstream use offers hope of 'doing more with less' for those who can harness it.

Along with the optimism surrounding AI development, wariness and uncertainty are present. New technologies can be daunting and ignite fears surrounding what it all means for our jobs (as we know them today). So, understanding the foundations of AI and having help along the implementation journey is crucial. With thoughtful incorporation, AI can help you get more time back in your day, reprioritize your efforts, streamline your workflows, and in turn, boost your fundraising efforts.

In addition to guiding you through the process of understanding and incorporating AI, in this ebook we will also drill down into one subtype of AI that can be particularly useful for nonprofits: **Generative AI.**

⚡ Kindsight's Generative AI product, *engage*, can act as your fundraising co-pilot by addressing some long-standing pain points that many nonprofit and advancement professionals face. This ebook will explain how it works and give real-life examples of what it can help you achieve in Chapters 2 and 3.

Generative AI for education, healthcare, and nonprofits.

What is AI?

AI, or Artificial Intelligence, refers to the simulation of human intelligence in machines that are programmed to think, learn, and problem-solve like humans. AI aims to develop systems that can perform tasks that typically require human intelligence, such as visual perception, speech recognition, decision-making, and language understanding.

There are many different types of AI, and the capabilities and use cases are expanding all the time. Many AI technologies include machine learning and deep learning. Machine learning involves algorithms that allow computers to learn from data and improve their performance over time. Deep learning, a subset of machine learning, involves neural networks with many interconnected layers.

Subject: Year End Support Needed for Lifesaving Equipme

Add a hyphen
Year-end

Dismiss

Dear Mr

We are incredibly grateful for your past support and would like to extend an opportunity to contribute once...

Common AI definitions:

Narrow AI (Weak AI): AI systems designed and trained for a specific or narrow set of tasks. Most AI applications currently in use fall under this category.

General AI (Strong AI): Theoretical AI that can understand, learn, and apply knowledge across a wide range of tasks at a level comparable to human intelligence. General AI can perform any intellectual task that a human can do.

Machine Learning (ML): A subset of AI that focuses on developing algorithms and models that allow computers to learn from data and improve their performance over time. It includes techniques like supervised learning, unsupervised learning, and reinforcement learning.

Deep Learning: A specialized subset of machine learning that involves neural networks with many interconnected layers (deep neural networks). Deep learning has been particularly successful in tasks like image and speech recognition.

Generative AI: AI systems focused on generating new and original content, such as images, text, audio, or videos. Generative Adversarial Networks (GANs) are a notable example.

Predictive AI: The use of machine learning algorithms to analyze historical data and make predictions about future events or trends. It can identify patterns, relationships, and trends in data that can be used to forecast future outcomes.

Natural Language Processing (NLP): AI that enables machines to understand, interpret, and generate human language. It is used in applications such as language translation, sentiment analysis, and chatbots.

Speech Recognition: AI systems that convert spoken language into written text. Speech recognition is used in applications like voice assistants and transcription services.

Neural Networks: Algorithms designed to recognize patterns. They interpret sensory data through a kind of machine perception, labeling, and clustering of raw input.

What is Generative AI?

Since the founding of AI in the 1950s, artists and researchers have used AI as a tool for creation. For example, in the early 70's, British artist Harold Cohen developed a computer program called AARON designed to generate paintings. He used AARON to create generative AI works that were exhibited at many museums throughout his career.

Generative AI, in today's context, encompasses deep-learning models that are capable of creating top-tier text, images, and diverse content based on the data models on which they are trained. This incredible technology accelerates crafting personalized and emotionally resonant content for its users. Serving as a creative player, Generative AI mirrors human creativity.

Why embrace Generative AI in fundraising?

Meeting fundraising goals is more challenging than ever; fundraisers wear multiple hats, donor attitudes and behaviors have changed, and the fight for philanthropic dollars is getting more competitive. Recognizing the immense pressure nonprofit organizations face in today's philanthropic landscape, forging a way forward is becoming increasingly crucial. One of the main benefits of Generative AI for nonprofits is the ability to streamline and automate repetitive tasks. Nonprofit organizations often have limited resources and staff, which means that time and energy are precious commodities. By automating tasks such as data entry, report generation, and first drafts of content, nonprofit staff can focus their efforts on more human-centered tasks.

> Automating repetitive tasks allows staff to focus their efforts on more human-centered tasks.

Generative AI is meant to enhance, not replace, human capabilities for increased efficiency and productivity. It is not intended to replace human judgment or intuition. Instead, it serves as a tool to support and augment human decision-making. Nonprofits are built on human empathy, compassion, and understanding, and those qualities cannot be replicated by technology. Using Generative AI thoughtfully, nonprofits can leverage its vast capabilities to share their stories in distinct and compelling ways, communicate with their donors in a more personalized way, and engage with their donors more consistently, making a more significant impact on their mission. It's not just an excellent tool; it's a game changer reshaping how we work, and rewriting what is possible.

Incorporating Generative AI into your nonprofit can present many benefits:

ENHANCED DONOR ENGAGEMENT
By creating and delivering personalized content, nonprofits can establish more profound and meaningful connections with their donors.

STREAMLINED OPERATIONS
Automate content creation processes, liberating valuable time for what matters most, creating impact, and building relationships.

CREATIVE PROBLEM-SOLVING
Use AI to condense content, produce reports, and create fundraising strategies and campaigns.
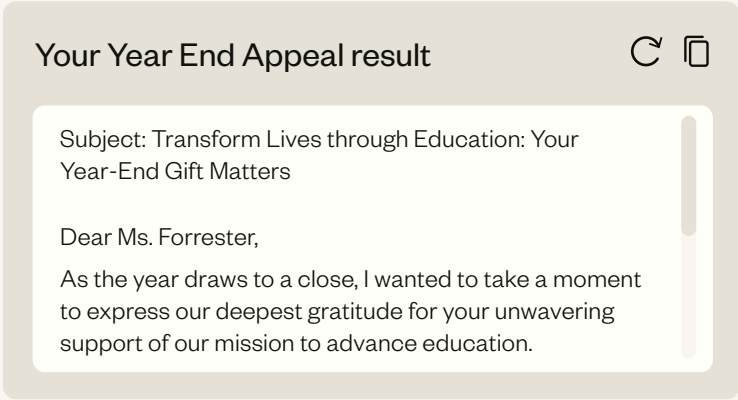
Examining Generative AI *solutions.*

Nonprofit-focused Generative AI solutions, like *engage* (more to come on that), differ from more general solutions (like ChatGPT) in their purpose, design, and adaptability. Although both have strengths, it is important to clarify the differences between tools that are tailored to nonprofit, education, and healthcare organizations, and tools that are not. To illustrate this, let's take a comparative look at both types of products.

	engage	ChatGPT
Nonprofit Specialization	Built for nonprofit professionals and tailored to specific sectors (e.g., healthcare, arts, human services)	General tool, no industry-specific focus
Content Tailoring	Content generated reflects the organization's unique brand voice and tone, and is personalized for each donor	Provides general content that requires additional tailoring to fit the organization's brand and the tone of the piece
Ease of Use	Guided prompts for nonprofit tasks including grant writing, thank you letters, and email appeals; Easy rewriting of sections	Requires time to craft and refine prompts, and requires contextual details
Adaptability and Long-term Usability	Adapts to user needs (such as brand identity and donor personas), and retains preferences for consistent output	Does not adapt or save preferences; requires manual editing and frequent retraining

Kindsight's Generative AI, *engage,* is a copywriting tool that produces first drafts so fundraisers can quickly edit and distribute more quality content. *engage* enables any fundraising professional, with minimal input, to create the first draft of anything from website content to social media posts to fundraising appeals in minutes instead of hours.

Your Year End Appeal result   ↻ ⧉

Subject: Transform Lives through Education: Your Year-End Gift Matters

Dear Ms. Forrester,

As the year draws to a close, I wanted to take a moment to express our deepest gratitude for your unwavering support of our mission to advance education.
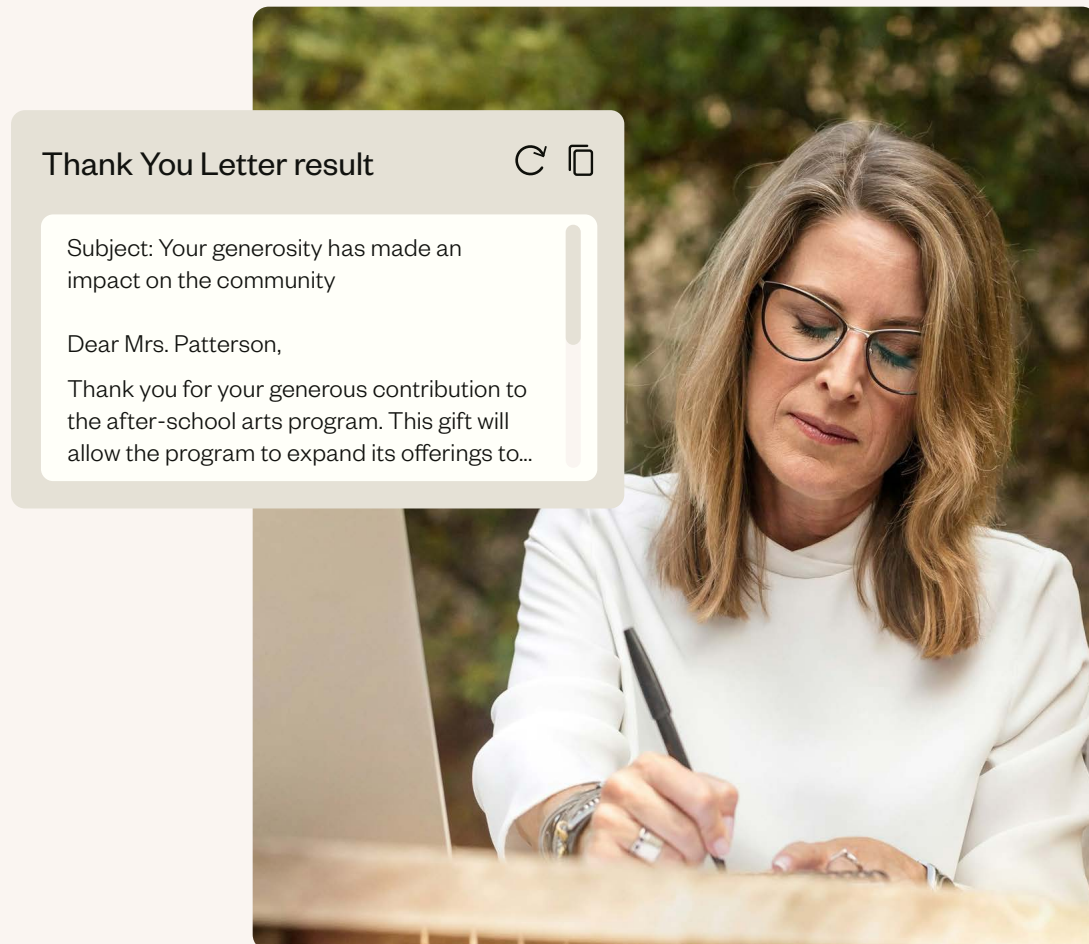
You can think of *engage* as your fundraising co-pilot. It can get your content 80% of the way there, and then you can finesse, optimize, and deliver it. Imagine no more blank screens, no more overused templates, and no more carbon copy emails used time and time again; just unique first drafts that are personalized and ready to be refined. *engage* enables you to take back your time and focus on what matters most for your organization, creating impact and building personal relationships.

engage eliminates this complexity by providing guided prompts for grant writing, thank you letters, email appeals, and more. You can also easily rewrite sections of your content without the need to regenerate the entire piece or go through the effort of copy and pasting back into the prompt. This difference in ease of use allows users of all types of comfort and AI knowledge to use engage and still get impressive results.

engage also continuously adapts and fine-tunes its output to better align with your needs (language preferences, brand voice, and donor personas) as you use it. Its language model leverages human science and data to understand the drivers of donor behaviors and the ideal communication approach (e.g. empathy-driven content that inspires action). This information is saved and guides future use of the product, regardless of user.

When you interact with ChatGPT, your inputs don't have a lasting impact on the model itself; it maintains generic structures regardless of individual reactions. So it doesn't keep your voice or mission in mind when creating content for you. This means more editing and adapting, and more training on the program for new employees. When those employees leave, you have to start all over again.

Thank You Letter result

Subject: Your generosity has made an impact on the community

Dear Mrs. Patterson,

Thank you for your generous contribution to the after-school arts program. This gift will allow the program to expand its offerings to...

How to leverage the power of *engage*.

When people think of Generative AI, they often think of creating content. But with *engage*, you can do that and so much more. You can use it to create multi-channel campaigns, summarize donor profiles with talking points, and schedule social media posts. In fact, you can select from more than 80 guided prompts that allow you to simply input a short description and generate a first draft in seconds.

Start Your Project

Fundraising Emails
13 Prompts

Data and Operations
11 Prompts

Grants
6 Prompts

Direct Mail
9 Prompts

Careers and HR
8 Prompts

Scripts and Suggestions
13 Prompts

Advanced Use Cases
9 Prompts

Volunteers
8 Prompts
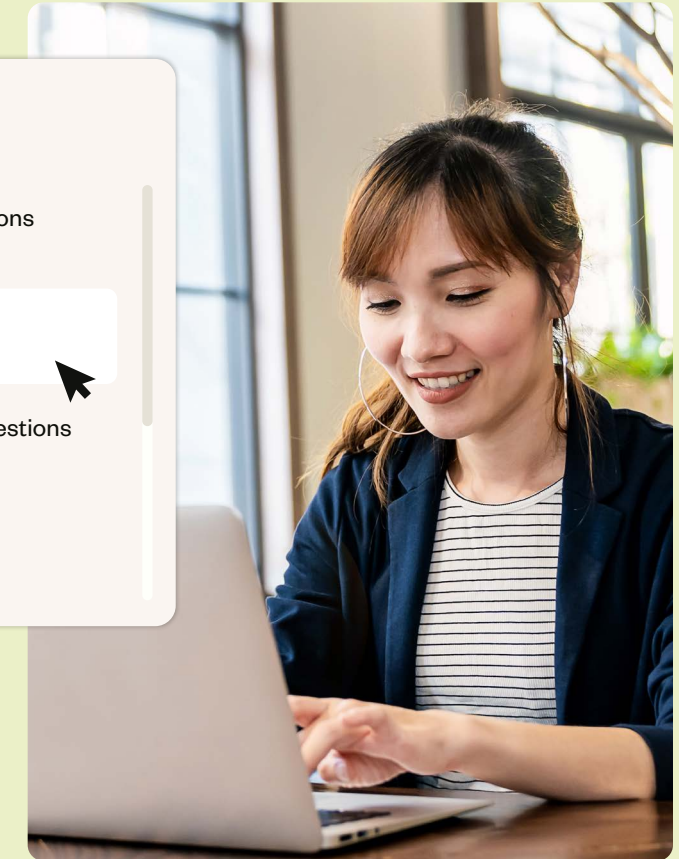
How it works.

| Select from over 80 guided prompts. | Provide a short description of your organization. | Generate a first draft or entire campaign in seconds! | Edit, optimize, and execute directly in the platform. |

Let's dive into some examples:

Content Generation

- Use 80+ prompts to create new content, adjust content length, or enhance your copywriting

- Brainstorm new ideas or create stories of impact to showcase in blogs or on your website

- Generate content that reflects your unique brand voice and tone, tailored to each donor's unique characteristics and motivations

Maximize Digital Marketing

- Design, schedule, publish, and analyze social media content from one platform

- Maintain a consistent online presence and engage with your audience at optimal times

- Write entire blog posts

Multi-Channel Campaigns

- Quickly generate drafts and automate full campaigns, ensuring a cohesive message

- Use an automatically generated campaign brief to collaborate with key stakeholders

- Combine direct mailings, emails, social media, text messages, and other channels to deliver high-performing outreach

Document Analysis and Summarization

- Upload documents and effortlessly transform the content into talking points, insightful quotes and excerpts for social media posts, and more.

- Save time on meeting prep by using AI to summarize a donor profile and prepare talking points

- Create a personalized stewardship plan for any donor, complete with all corresponding outreach

Popular prompts

Here is a sampling of content types that can be created by Generative AI:

Fundraising Emails

- Campaign appeals
- Thank-you letters
- Tax receipts

Program Content

- Program descriptions
- Pitch decks
- FAQs

Social

- Blog posts
- Facebook posts
- Google ads

Website

- Webpage content
- Landing pages

Direct Mail

- Year end appeals
- Planned Giving information

Campaigns

- Entire multi-channel campaigns

Grants

- Grant applications
- Letters of intent
- Meeting request letters

Synergizing Fundraising Intelligence and Generative AI.

Generative AI is just one piece of the Fundraising Intelligence system. Kindsight's Fundraising Intelligence platform combines big data, automation, and AI to power modern fundraising efforts.

You're probably familiar with Kindsight's profiles, prospect research, and analytics capabilities, but imagine having the ability to immediately action that intelligence and engage your donors with the click of a button and a few edits. With generative AI from *engage*, you can expand, understand, and engage your donor base to improve donor retention and increase revenue—maximizing your nonprofit's impact.
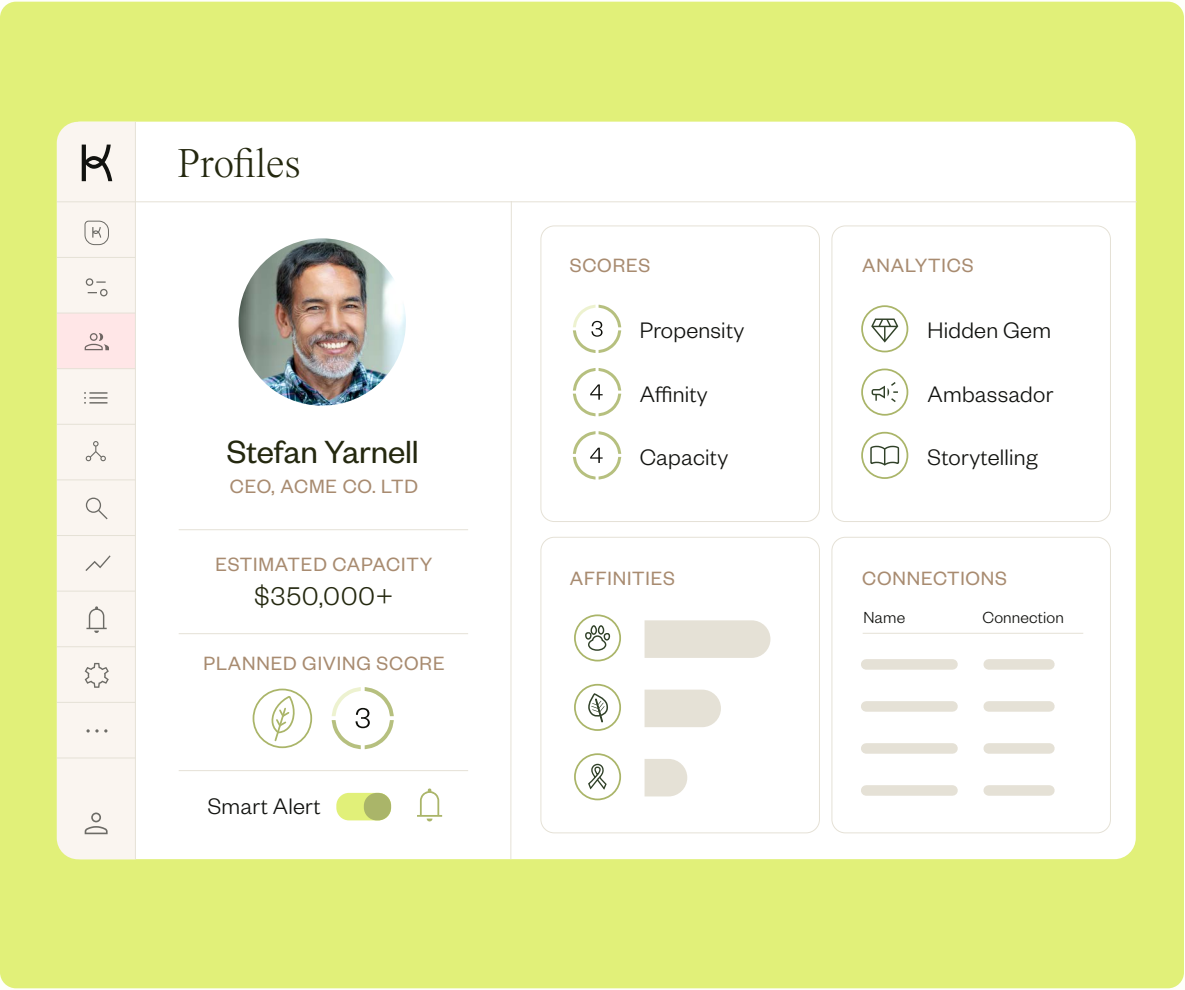
A planned giving prospect is discovered and actioned.

Imagine this... You have a database of thousands of donors, but you don't know enough about them. Which donors could give a planned gift? Who is perfect for the annual appeal? Who gave $100 last year but could be giving thousands?

Now imagine Kindsight is your Fundraising Intelligence platform, and you use it to enrich every donor in your database, so that they all receive a Planned Giving Score (a rating from 1 to 4, with 4 being the highest, which measures how likely a person is to be a planned giving prospect). This score is determined by indicators such as age, propensity score, affinity score, capacity score, insider filings, real estate holdings, and donations and charitable activity.
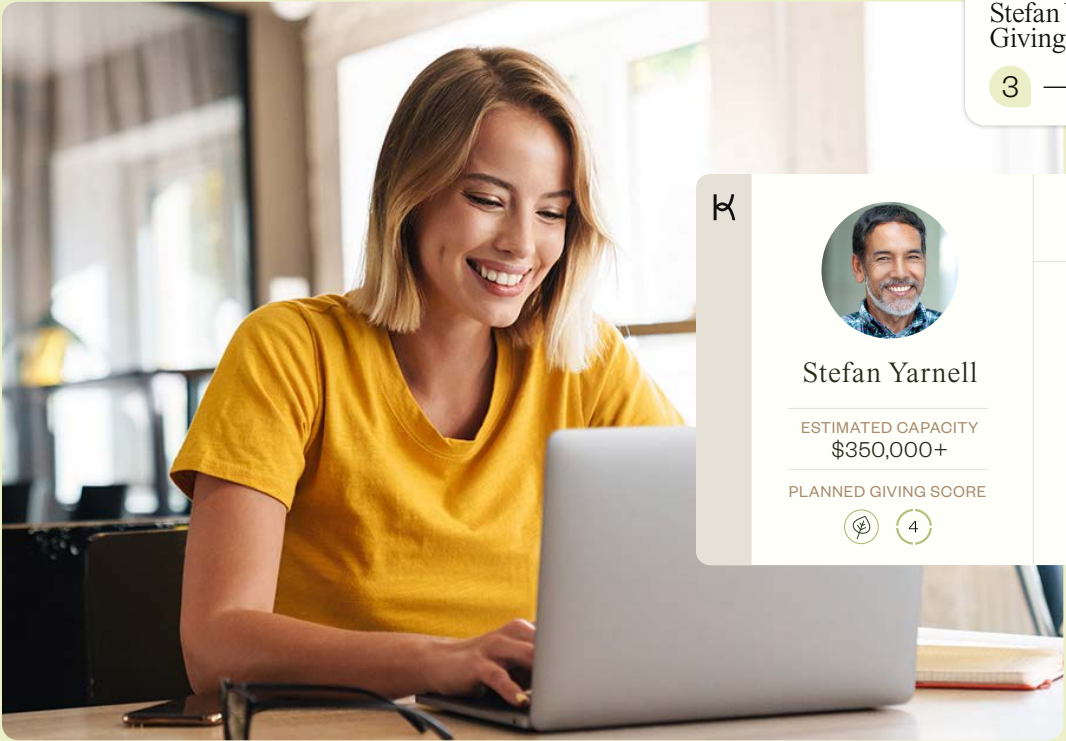
One day, you get notified that one of your existing donor's planned giving score has just increased from 3 to 4. Because of this, you add the donor to your planned giving prospect list, and start the workflow of sending direct mail, a personalized email, and initiating a follow-up call to set up a meeting one week after the email.

Explore Fundraising Email Prompts

Thank You Letter

Create a thank you letter for a donor to a specific program or funding area.

Year End Appeal

This will create a fundraising appeal specifically for the end of a calendar year.

Donor Visit Follow Up

Create an email thanking a prospect and recapping the discussion.

Planned Giving Appeal

This will create a fundraising appeal for specific planned gift options.

Giving Tuesday Appeal

This will create a fundraising appeal specifically for Giving Tuesday.

Matching Appeal

This will create a fundraising appeal specifically to match a gift.

Next

Your Planned Giving Appeal result

Subject: Help make a lasting difference for animals in need

Dear Mr. Yarnell,

As someone who deeply values the well-being of animals, we know you share our commitment... making this vision a reality...

This is where *engage* steps in to do some heavy lifting. It can draft the direct mail and email pieces based on the donor's profile and planned giving score. The draft can then be reviewed, edited, and sent by the appropriate person. Then, through *engage*, you create pre-call coaching notes to give to the appropriate user prior to making the follow-up call. Voilà! Your new planned giving prospect is already being nurtured and engaged with!

By bringing donor insights, AI, and automation together, the process of understanding and reaching out to a prospective donor becomes streamlined and comprehensive, with much less effort and time spent on the part of the fundraiser.

EXAMPLE 2:

# A donor profile is needed for the Executive Director.

Imagine this... A new prospective donor comes across your desk and your ED has a meeting with them later that day. Normally, a task with such little notice might be stressful and take up a large portion of your day, interrupting your already planned to-do list. But with Kindsight and *engage,* the time you spend on this can be cut down significantly.

First, you quickly view a Kindsight Live Profile, complete with a Kindsight Score and always kept up to date. It also highlights causes the donor has supported, past giving history, estimated giving capacity, interests, wealth attributes, and an easy-to-digest summary explaining the key information about the prospect. Then, use *engage* to generate suggested talking points your ED can use during the meeting.

Now your task is that of a reviewer. Instead of going through the often painstaking process of gathering information, searching multiple sources, sifting through, organizing, summarizing, and creating speaking notes, you can quickly deliver the complete donor profile, with highlights and talking points to your ED much faster.

Using Fundraising Intelligence, AI, and automation in this instance cuts down on the time and effort it would normally take to complete this task. The chance that this surprise meeting will derail your day goes way down and allows you to stay on schedule and complete your work, pretty much as planned.
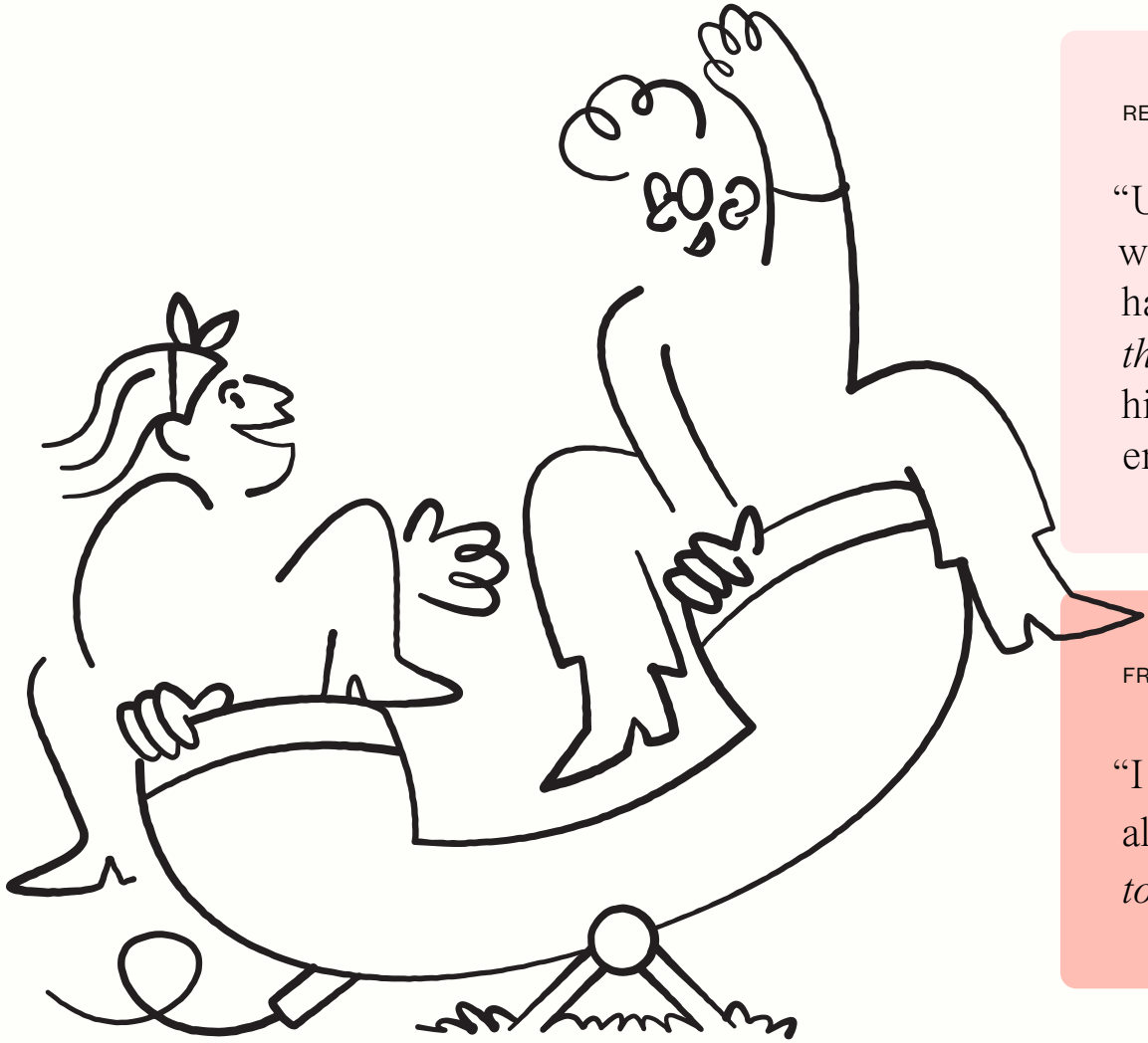
engage can quickly compile talking points by summarizing a prospect's Kindsight profile.
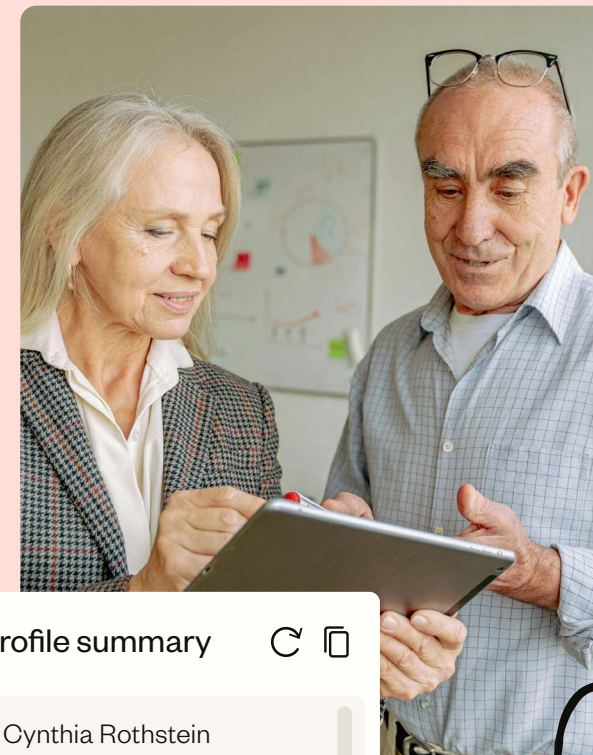
Profile summary

Cynthia Rothstein

- $75K in donations in the past 3 years
- Affinity toward arts and culture
- Met Symphony board member
- Husband is CFO of Acme Inc.
- Owns 4 properties in the US

What users had to say about *engage.*

"Usually, we spend hours mulling over words, and not feeling satisfied with what we wrote, or feeling like it was too dry or repetitive to what we had already written in previous emails. *With this technology, it took less than 10 minutes to generate an appeal, edit, and schedule to send.* I would highly recommend, especially for smaller nonprofits who do not have enough people on staff to write their appeals or enough time to do so."

"I was in meetings all afternoon and when I emerged, my fundraiser was all OMG…we can't get rid of this EVER! And I quote *'I don't know how to do my job anymore without this'*, thank you!"

How to incorporate AI.

In collaboration with Mallory Erickson

Despite the exciting possibilities that come with the use of AI, fear and uncertainty are present in the back of our collective minds.

For many of us, AI remains a mysterious and unknown entity; we often think that AI is not meant for us if we're unable to fully comprehend its implications and potential. Specifically in the nonprofit sector, these fears extend to concerns about how AI may impact human connections or personal touches in fundraising.

However, there are ways to mindfully, intentionally, and safely incorporate AI into your workflow so that you can find more space in your workday and, in turn, boost your fundraising efforts.

Understand your *feelings* about AI, data, and technology.

Take the time to reflect on your emotions, biases, and reactions about AI through awareness exercises. The two following tactics are scientifically proven and recommended by psychologists Britt Frank, author of *The Science of Stuck*, and Dr. Ethan Kross, author of *Chatter*, to help you navigate moments of resistance and make it easier to embrace new technology.

When you experience feelings of nervousness or apprehension, it is essential to **acknowledge and validate** them. It's normal to feel nervous or resistant to changes as they activate our nervous system, and by verbally recognizing these emotions, you can help yourself move through the discomfort. For example, you can say to yourself, *"I am feeling really nervous about using this tool for the first time, and that makes sense."*

Another effective tactic is to engage in **distant self-talk**. This involves using positive affirmations along with your first name. By doing this, you can reinforce your ability to adapt to new technology. For instance, you can tell yourself, *"You can do this, (NAME). You have successfully implemented new technology in the past."*

Recognize and *celebrate* the use of AI in your operations.

Acknowledging and appreciating the areas where AI is already being utilized in your operations is crucial. Many individuals may have reservations or misconceptions about AI, but it is essential to break through these barriers and recognize the value it brings.

Let's take Canva as an example. Canva is a popular graphic design tool that many nonprofit professionals might already be using. While some may not even be aware that Canva incorporates AI, it has successfully solved a problem. The ease of use and user-friendly interface of Canva has made it the go-to tool for many nonprofits when creating graphic images.

By acknowledging and celebrating the instances where AI already supports you, you are more likely to overcome limiting beliefs and explore other AI-based technologies that can further enhance your productivity and success as a fundraiser. By doing this, you can foster a mindset that is open to embracing new technologies for a more significant impact. Remember, actions speak louder than words, so let the use of AI in your operations be a testament to its effectiveness and value.

Approach AI integration with *a purpose*.

In the journey to integrate AI, start by identifying your challenges rather than focusing solely on the technology. The ultimate goal is not just to implement AI but to address your organization's biggest pain points.

For example, consider the challenges you may face in grant writing, such as dealing with various word count limits for similar applications. Utilizing Generative AI, such as *engage*, can help by condensing lengthy paragraphs into a concise summary that meets the specific word limit requirements.

Organizations may also need help understanding their donor data and need guidance on the donation amount they should request from current or prospective donors. In such cases, Kindsight (which incorporates predictive AI into its functionality) can provide valuable donor data analysis to ensure nonprofit professionals understand the donors' affinity, capacity, and propensity to give.

REAL-TIME ALERT

12 New Donor Matches

View Details →

See a space for AI in your workflow.

Chances are, you have a number of versatile responsibilities and have to juggle your time and effort across multiple areas to get it all done. When searching for AI, it is helpful to think of it as a personal assistant, something that can take tasks off your plate and let you focus on what matters most to you, and that only you can do.

The following prompts can help you get insight into where AI might make a difference in your workflow.

Prompt 1

I wish I had more time for _____. I would do _____ if I had more time.

Are there multiple roles that you are currently handling within your organization? Reflect on how you can make the best use of your time and what you could achieve with that extra time.

Prompt 2

If I could spend more time on _____, it would have _____ impact on our org.

Assess the return on investment (ROI) of the activities you wish you had more time for. For example, if you could dedicate more time to meetings with donors, tailoring personalized thank you messages, or analyzing detailed reports on how donations are being utilized, what impact could it have on your organization?

Prompt 3

If I could outsource _____, I could focus on _____, which only I can do.

Identify tasks in your routine that can be automated or do not require a human touch. Review your task list and determine which tasks you consider to fall outside your scope of work or area of expertise, and where you would appreciate support.

Create strong donor *experiences.*

While AI's potential is vast, it's essential to approach its adoption responsibly. To ensure thoughtful and conscientious adoption, there are a few key areas to focus on.

Prioritize partner alignment, protecting PII, and data privacy.

Protecting sensitive information about beneficiaries, donors, and operations is a top priority when adopting AI. Nonprofits must implement robust data protection measures and comply with regulations like CCPA (California Consumer Privacy Act) or GDPR (General Data Protection Regulation) to prioritize data privacy. By doing so, nonprofits cultivate trust and uphold the integrity of their mission. In the same vein, it is crucial to take the time to select dependable technology partners. Inquire about their engagement with **Fundraising.AI**, and ensure they also comply with the previously mentioned regulatory bodies.

Your organization's integrity hinges on the trust of your stakeholders, and it's imperative to protect their personally identifiable information (PII) when using any technology. As a general rule, do not include any PII in AI-driven platforms unless it is supported by a SOC-compliant database to ensure the security of any sensitive data within it.

Additionally, make it a habit to review and activate all privacy settings on your AI tools and conduct regular audits to ensure ongoing compliance and security. Take the time to read the privacy policies of your platforms to understand how they will handle your data and what terms you are accepting. Explore the security and privacy settings in your platforms of choice and curate how you would like to have your data stored.

For example, you may be given the option to
1) have the data you provide automatically removed after a set period of time,
2) manually delete the data yourself, or
3) let the platform keep it indefinitely.

FundraisingAI

Fundraising.AI is a fully independent collaborative that exists to understand and promote the development and use of Responsible AI for nonprofit fundraising. The 2023 Fundraising.AI Global Summit was the largest gathering of nonprofit and for-profit professionals and organizations to explore the role of Responsible AI in fundraising.

Review AI content for accuracy.

Fact-checking and reviewing information from AI platforms are essential practices to ensure the accuracy, reliability, and appropriateness of the generated content, safeguarding against potential misinformation, biases, and other issues.

Using your judgment and thinking critically when using AI is crucial for several reasons:

Accuracy and Quality Control:
Generative AI platforms generate content based on patterns learned from (sometimes diverse) data sources. These models are not infallible and can produce inaccuracies or misinformation. Fact-checking helps ensure the information's accuracy and reliability before it is shared or acted upon.

Contextual Understanding:
AI models may lack the ability to fully understand context, nuance, or the evolving nature of certain topics. Human reviewers can provide the necessary contextual understanding to evaluate whether the generated information is appropriate and relevant in a given context.

Ethical Compliance:
Reviewing content is essential to ensure that it complies with the ethical standards of your organization and is free of bias. This is particularly important when dealing with sensitive topics or vulnerable populations.
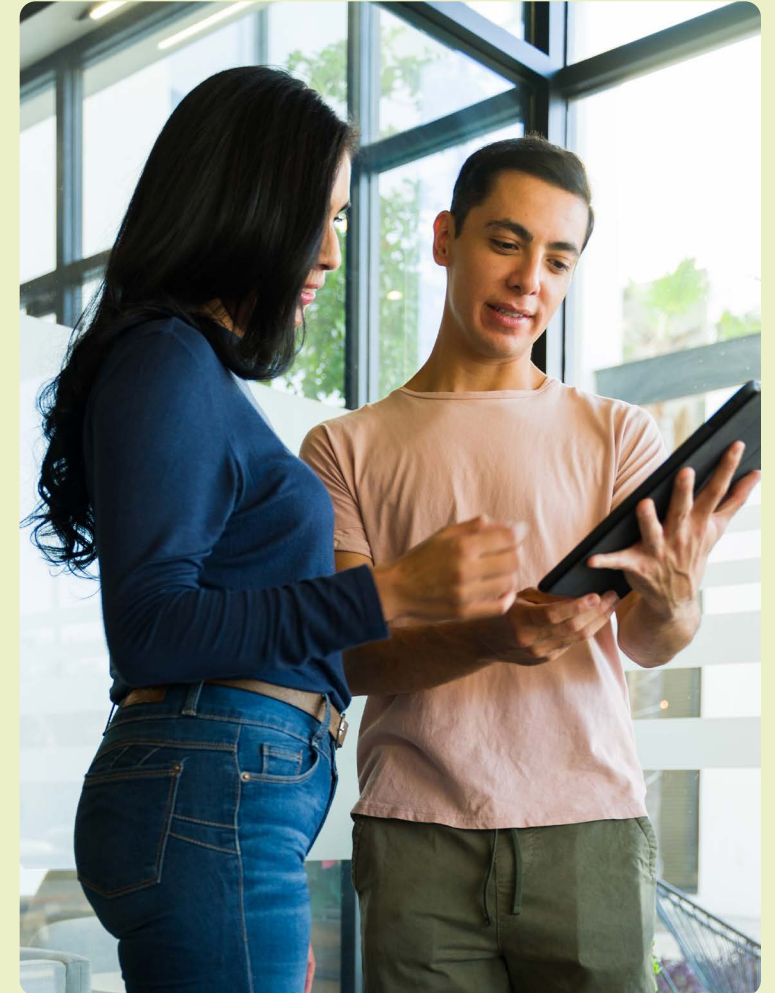
Embrace the future of AI.

Embracing AI is not just an exciting technological leap; it's a step towards shaping a future where all organizations thrive in their missions. AI is not about replacing the human touch, but enhancing it!

By accepting and incorporating AI into your daily workflows, you can stay with the curve of innovation and increase your output (and impact) without burning the candle at both ends. You will *actually* be able to "do more with less", and focus on the activities that only you can do, the ones that require a human element.

As you begin your AI-powered journey, may you find inspiration, efficiency, and success in leveraging this technology to advance your mission, strengthen connections, and create a lasting positive impact in the world!

Eager to explore the power of Generative AI for your nonprofit?
Book a call to learn more about *engage.*

Book Now

TASK
Send email to Adam Collins

✦ Use AI to Generate First Draft

Kindsight's Fundraising Intelligence is an industry-leading platform that helps fundraisers identify and engage with the right donors at the right time. The result is more efficient, effective fundraising. It combines the most comprehensive advancement and fundraising CRM, with rich data and insights and revolutionary AI-based content creation. Education, healthcare, and nonprofit organizations can discover, engage, and steward donors like never before.

Kindsight