



// WEBINAR

How to Practically Adopt & Use AI in Fundraising

(Without Losing Your Mind)



Nathan Chappell

Chief AI Officer, Virtuous | Founder, Fundraising.ai



Louanne Saraga Walters, MS

Director of Development, MSU Denver



Scott Holthaus

Director of Brand + Content, Virtuous

// INTRODUCTIONS

Meet Today's Speakers



Nathan Chappell

Chief AI Officer,
Virtuous Founder,
Fundraising.ai



Louanne Saraga Walters, MS

Director of Development, University
Advancement Metropolitan State University
of Denver



Scott Holthaus

Director of Brand + Content,
Virtuous

// AGENDA

Today's Agenda

01 Adopting AI Efficiently

The 6-step framework

02 Using AI Effectively

Prompting, skills, and custom GPTs

03 Deploying AI Strategically

A real-world case study from MSU Denver

04 Live Q&A

PART 1

Adopting AI Efficiently

Nathan Chappell

// THE LANDSCAPE

Where the Sector Actually Stands

92%

of nonprofits are using AI

7%

say it's making real strategic impact

65%

describe their AI use as reactive, not organizational

The gap isn't access to tools. It's strategy, governance, and documentation.

From experiment to capability

1



Assign a Cross-
Functional AI Team

2



Establish AI
Governance Ownership

3



Create an Acceptable
Use Policy

4



Document
What Works

5



Pair the Right Tools
with the Right Strategy

6



Measure
Results

These foundations take weeks to build, not months.

PART 2

Using AI Effectively

Scott Holthaus & Nathan Chappell

A Framework for Better Prompts

01

Role

Who should the AI act as?

"You're a development director at a faith-based food bank."

02

Context

What does it need to know?

Mission, recent story (Sarah's family), donor segment, voice.

03

Task

What do you want it to do?

"Write a 150-word thank-you. Warm, personal, not transactional."

04

Examples

What does good look like?

"Here's one we sent last year that hit the right tone:..."

PROMPT

1

The
throwaway

THE PROMPT

"Write me a year-end appeal email."

WHAT YOU GET

"As the year comes to a close, we wanted to reach out and thank you for your incredible support. Your generosity has made a tremendous impact on our mission. As we look ahead to next year, we hope you'll continue to stand with us in making a difference..."

PROMPT

2

Role + Task

*Better. More
focused. Still
missing soul.*

THE PROMPT

“You're the Development Director at a housing nonprofit in Riverside County called Homeless No More. Write a year-end appeal email to mid-level donors who have given for at least two consecutive years.”

WHAT YOU GET

“For two years, you've invested in making Riverside County a place where homelessness doesn't have to be permanent. This year, 340 of your neighbors moved from crisis to stability – in an average of just 23 days. Before December 31, would you consider renewing your support?”

PROMPT

3

Full context

Now we've
got something
usable.

THE PROMPT

Role: Development Director at Homeless No More, a housing nonprofit in Riverside County.

Context: Mission, Darnell's story (18 days to housing), mid-level donors (2+ yrs)

Task: no more than 250-word email. Warm but urgent. End with a monthly upgrade ask.

Example: Last year's best-performing appeal, pasted in.

WHAT YOU GET

"Darnell didn't ask for much. After eleven years driving a forklift in Perris, a back injury took everything. Six months later, he was sleeping in his truck. His daughter had stopped calling. Eighteen days after he walked into our office, he had keys. That's what your giving makes possible. Before December 31, would you consider adding \$25 a month to the gift you already give? His daughter calls every Sunday now."

Keep your context in one place

Projects:

a workspace that remembers.

You shouldn't have to re-paste your mission, voice, and donor segments into every prompt.

Inside a project

Save once. Reuse forever.

- 01 Mission statement
- 02 Voice and tone guide
- 03 Donor segments and personas
- 04 Recent stories and stats
- 05 Examples of past work that worked
- 06 SOPs and team workflows

Every prompt inside already knows.

PART 3

Deploying AI Strategically

Louanne Saraga Walters & Scott Holthaus

// CASE STUDY: MSU DENVER

| The Strategic Gap

CRM Data

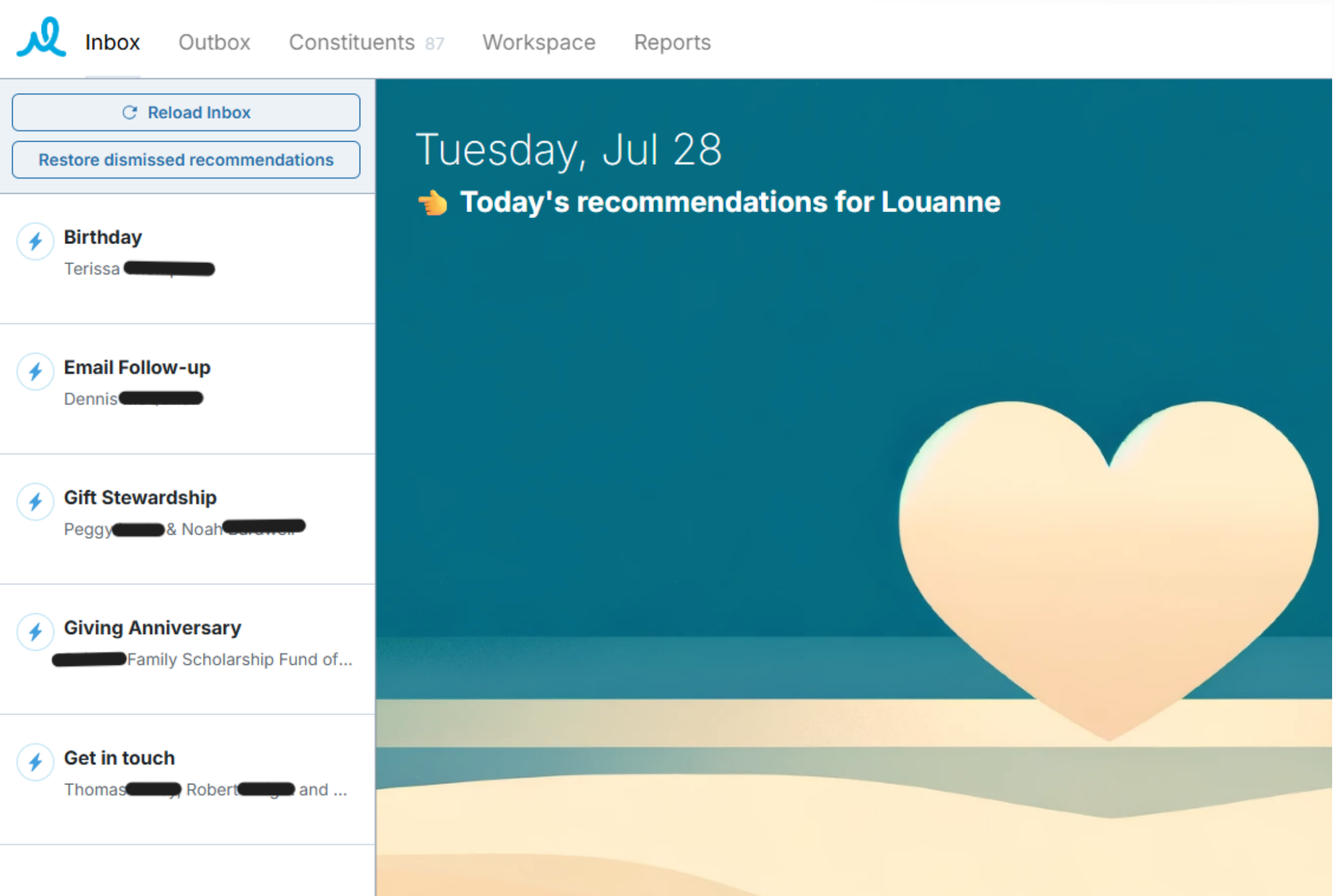
Systems like Raiser's Edge are excellent systems of record. They capture history—the "what" and the "who."

Smooth Strategy

Momentum provides the "how." It creates the proactive path to engage donors strategically while capturing tasks efficiently.

Alerts & Reminders

- > Gifts Received Notifications
- > Birthday & Anniversary Alerts
- > Automatic Action Reminders



// CASE STUDY: MSU DENVER

Efficient Drafting: Auto

The screenshot displays the Virtuous email drafting interface. The top navigation bar includes links for Inbox, Outbox, Constituents (87), Workspace, and Reports. The left sidebar shows a list of email drafts, with the selected one titled "Email Follow-up" to "Dennis". The main drafting area shows the email's header with the recipient "To: [redacted]@gmail.com" and the subject "Subject: Heartfelt Thanks for Your Generous Gift to the [redacted] Family Endowment!". The body of the email is a draft, starting with "Hi Dennis," followed by a paragraph about following up on a note from April 20 regarding a Planned Gift Intent Form. It then mentions a \$25,000 gift to the [redacted] Family Endowment and offers to resend a tax receipt. The draft concludes with a personal note and the sender's name, "Louanne". Below the draft, the sender's full name and title, "Louanne Saraga-Walters, MS, CAP® Senior Director of Development and Legacy Giving University Advancement", are displayed, followed by the "Metropolitan State University of Denver" contact information. At the bottom, there is a dropdown menu for "Action Type" with "Action type" selected, a "Send" button, and a status bar indicating "Last synced 36 minutes ago".

Navigation: Inbox, Outbox, Constituents 87, Workspace, Reports

Back to Inbox

Email Follow-up
Dennis [redacted]

Select all

Dennis [redacted] Apr 20th
Tier PG - Cultivation Email

Email

To: [redacted]@gmail.com

Subject: Heartfelt Thanks for Your Generous Gift to the [redacted] Family Endowment!

B *I*

Hi Dennis,

I wanted to gently follow up on my note from April 20 regarding the Planned Gift Intent Form and the copy of the trust page naming MSU Denver as a beneficiary. I completely understand that you and Janet had some health concerns at the time, so please know there is no urgency. I simply want to be sure everything is clear and that you have what you need when the timing feels right.

Also, I hope you've since received the formal tax receipt for your \$25,000 gift to the [redacted] Family Endowment. If it has not arrived, I'm happy to resend it right away.

When you're both feeling up to it, I would still welcome the chance to connect, whether by phone or in person. In the meantime, I'm keeping you both in my thoughts.

Louanne

Louanne Saraga-Walters, MS, CAP®
Senior Director of Development and Legacy Giving
University Advancement

Metropolitan State University of Denver
Campus Box 14, P.O. Box 173362 | Denver, CO 80217-3362
Tel 303-615-1135 | Cell 813-454-6934 | Fax 303-556-5094

Action Type *
Action type

Send

Rate AI

✓ Last synced 36 minutes ago

- > Draft emails and personalized letters
- > Focus on strategic intent
- > Increase total touchpoint volume
- > Drafts are based on your writing samples

Efficient Drafting: Part I

 New Action

Peggy   

July 28, 2026

Exclude 

 AI Quick Draft

email to peggy that i'm looking forward to seeing her at the luncheon next month, confirming she's at my table and letting her know dean masserini will be there as well (i know she enjoys his company). let her know i'll follow up with more info once we have details on parking, etc

 Email
 Card
 Call
 Letter

Template | Cadence

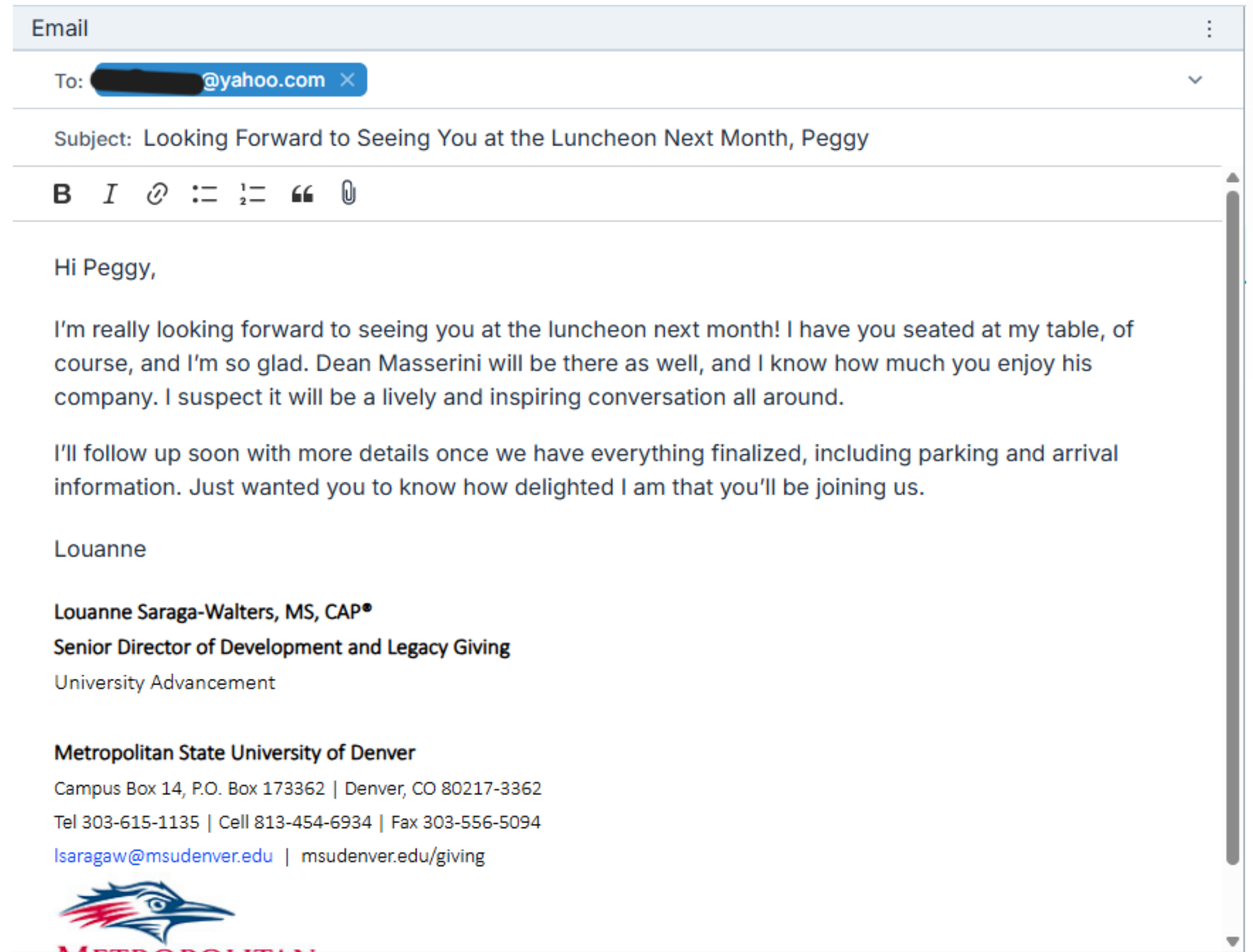
☐ Follow up if no reply?



- > Draft emails and personalized letters
- > Focus on strategic intent
- > Increase total touchpoint volume
- > Drafts are based on your writing samples

Efficient Drafting: Part II

- > Easy copy/paste onto letterhead
- > Refining AI-generated content
- > Consistent voice and branding
- > Drafts are based on your writing samples



// CASE STUDY: MSU DENVER

Portfolio Segments

 Inbox Outbox Constituents 87 Workspace Reports New Action Search Mom					
Portfolio Segments Lists BETA					
Board, Trustee, Liaison 6 donors 5/5 automations 11 touches in the last 3 months View	CRM Assignments 11 donors 28 touches in the last 3 months View	Legacy Society - Revisit 6 donors 5/5 automations 0 touches in the last 3 months View	Reassign 5 donors 1/5 automations 3 touches in the last 3 months View	Tier A 10 donors 5/5 automations 8 touches in the last 3 months View	Tier B 9 donors 5/5 automations 5 touches in the last 3 months View
Tier C 8 donors 5/5 automations 5 touches in the last 3 months View	Tier PG - Blended 5 donors 5/5 automations 9 touches in the last 3 months View	Tier PG - Cultivation 11 donors 5/5 automations 16 touches in the last 3 months View	Tier PG - Qualify 8 donors 4/5 automations 7 touches in the last 3 months View	Tier PG - Stelter Parking Lot 1 donors 1/5 automations 0 touches in the last 3 months View	Tier Qualify 7 donors 4/5 automations 7 touches in the last 3 months View

Major Gifts

Personal moves management.

Planned Giving

Long-term legacy nurturing.

Legacy Relaunch

Engaging lapsed supporters.

| Segments Automations

- > Dynamic portfolio syncing
- > Automatic bucket categorization
- > Trigger-based strategic actions

All segments		
☒	Get in touch 120 days since the last contact	Tier B
☒	Birthday On the birthday	Tier B
☒	Gift Stewardship Immediately if Gift Received	Tier B
☒	Giving Anniversary On the anniversary	Tier B
☒	Email Follow-up After 7 days if no reply to my email	Tier B
☒	Get in touch 90 days since the last contact	Tier A
☒	Birthday On the birthday	Tier A
☒	Gift Stewardship Immediately if Gift Received	Tier A
☒	Giving Anniversary On the anniversary	Tier A
☒	Email Follow-up After 7 days if no reply to my email	Tier A
☒	Get in touch 90 days since the last contact	Tier PG - Blended
☒	Birthday On the birthday	Tier PG - Blended

// CASE STUDY: MSU DENVER | Stelter Lead Cadence: 1

- > Step-by-step touchpoint logic
- > Email vs. Task reminders
- > Setting custom day intervals

Edit Cadence

Cadence Name *

The Stelter Lead Cadence

Name *

Initial Outreach

Days After

0

Template *

Stelter 1: Lead Outreach

↓

Name *

Soft Follow-Up

Days After *

7

Template *

Stelter 2: Soft Follow-Up

×

↓

Name *

Value-Add & Final Outreach

Days After *

7

Template *

Stelter 3: Value-Add & Final ...

×

↓

Name *

Portfolio Clean-Up

Days After *

7

Template *

Stelter-4: Action Item - Do N...

×

+

Cancel

Save Changes

// CASE STUDY: MSU DENVER | Stelter Lead Cadence: 2

- Email vs. Task reminders
- Setting custom day intervals
- Capturing outcomes in RE



[Inbox](#)
[Outbox](#)
[Constituents 87](#)
[Workspace](#)
[Reports](#)

New Action

[Templates](#)
[Cadences](#)
[Planner](#)
[Engagement Plans BETA](#)
[Automations](#)
[Prospecting](#)
[Profile](#)

Filter by template author

Louanne Saraga-Walters

Template

You

Stelter 1: Lead Outreach

Dear {{donor.first_name}}, My name is [Gift Officer Name] and I am a [Title] here at MSU Denver. I am reaching out to personally thank you

You

Stelter 2: Soft Follow-Up

Dear {{donor.first_name}}, I hope you are having a great week. I am following up on the email I sent last week regarding your recent inquir

You

Stelter 3: Value-Add & Final Outreach

Dear {{donor.first_name}}, Since we haven't been able to connect just yet, I wanted to pass along something I thought you might enjoy. We

You

Stelter-4: Action Item - Do Not Send

Unresponsive Stelter Lead - Reassign or Disqualify Instructions for Gift Officer: This lead has completed the 3-step outreach cadence with

You

Stelter 1: Lead Outreach

Subject line

Thank you from MSU Denver / Your recent inquiry

B

I

:=

;-

“

@

Dear {{donor.first_name}},

My name is [Gift Officer Name] and I am a [Title] here at MSU Denver. I am reaching out to personally thank you for your continued connection to our university.

[OFFICER: CHOOSE ONE INQUIRY PARAGRAPH BELOW AND DELETE THE REST]

[Option A: Survey Respondent]

> Thank you so much for taking the time to complete our recent survey. We rely heavily on feedback from our community, and it was wonderful to see your responses. I noticed you indicated an interest in learning more about [insert specific topic from survey, e.g., endowed scholarships / specific college].

[Option B: Requested Information]

Thank you for reaching out and requesting more information regarding [insert specific topic, e.g., utilizing an IRA for charitable giving / our legacy programs]. Navigating these options can sometimes feel complex, and I am here to help make the process as seamless as possible.

[Option C: Indicated MSU Denver in Will/Estate]

We were absolutely thrilled to see your note indicating that you have included MSU Denver in your estate plans. Thank you for this incredible act of generosity. Legacy gifts like yours are the foundation of our students' future success, and we are deeply grateful for your profound commitment to our mission.

[OFFICER: CHOOSE ONE OFFER PARAGRAPH BELOW AND DELETE THE REST]

[Option 1: Offer a Phone Call]

I would love to schedule a brief, 15-minute phone call next week to introduce myself properly, answer any questions you might have, and learn a bit more about what inspires your support of MSU Denver. Are you available on [Day of week] or [Day of week] morning?

[Option 2: Sending Information & Scheduling Call]

I have attached the information you requested to this email. Please take a few days to review it at your convenience. I would love to schedule a brief phone call next [Day of week] at [Time] to answer any specific questions you might have. Let me know if that time works for you, or if another day is better!

[Option 3: Invite to Campus]

There is so much exciting momentum happening on campus right now. If you are local or find yourself in the Denver area, I would love to invite you to campus for a cup of coffee and a brief tour to show you firsthand the impact of our supporters.

Thank you again for your dedication to MSU Denver. I look forward to connecting with you soon.

Warmly,

[Gift Officer Email Signature]

Save

// CASE STUDY: MSU DENVER

Stelter Lead Cadence: 3

- > Email vs. Task reminders
- > Setting custom day intervals
- > Converting leads to relationships

TemplatesCadencesPlannerEngagement PlansBETAAutomationsProspectingProfile

Filter by template author

Louanne Saraga-Walters

Template

You

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Unresponsive Stelter Lead - Reassign or Disqualify Instructions for Gift Officer: This lead has completed the 3-step outreach cadence with

You

Stelter-4: Action Item - Do Not Send

Subject lineAction Item Reminder

B I : = ; = “ @

Unresponsive Stelter Lead - Reassign or Disqualify

Instructions for Gift Officer: This lead has completed the 3-step outreach cadence with no response over the last 21 da your active portfolio.

Please review the donor's profile and take one of the following actions today:

1. Move to Stelter Parking Lot: If the lead still shows long-term planned giving potential but is simply unresponsive right - Stelter Parking Lot."

2. Move to Disqualified: If the lead data is bad, or upon further research they do not meet the qualification metrics for a "Disqualified" so they fall back into the general annual giving pool.

// CASE STUDY: MSU DENVER

The Planner

It captures today's tasks and allows you to add items by date.

The strategic hub for daily fundraising execution.

InboxOutboxConstituents 87WorkspaceReports

New Action

Search MomentumAlt-K

LS

TemplatesCadencesPlannerEngagement PlansBETAAutomationsProspectingProfile

All Constituents

Jul 27 - Aug 02, 2026WeekMonth

	MON Jul 27	TUE Jul 28	WED Jul 29	THU Jul 30	FRI Jul 31	SAT Aug 01	SUN Aug 02
Tier PG - Cultivation		6 Actions	1 Action		1 Action		
DM Dennis McQuillen		Get in touch					
FL Ford Law		Get in touch					
OH Orlando Hernandez		Get in touch					
PS Pamela Soren		Get in touch					
RA Robert Anderson		Get in touch					
RW Robert Wright		Get in touch					
TT Teresa Thompson					Birthday		
GM Gregory Mathis							

// THE RESULTS

Why This Matters

50%

more portfolio capacity for MGOs

~300 → ~3,000

managed donors per mid-level gift officer

1–3 hrs

back per day

3+ yrs

average tenure, vs. 18 months industry average



Virtuous Momentum Built for Fundraisers

Integrates with Office 365

Works alongside your current CRM

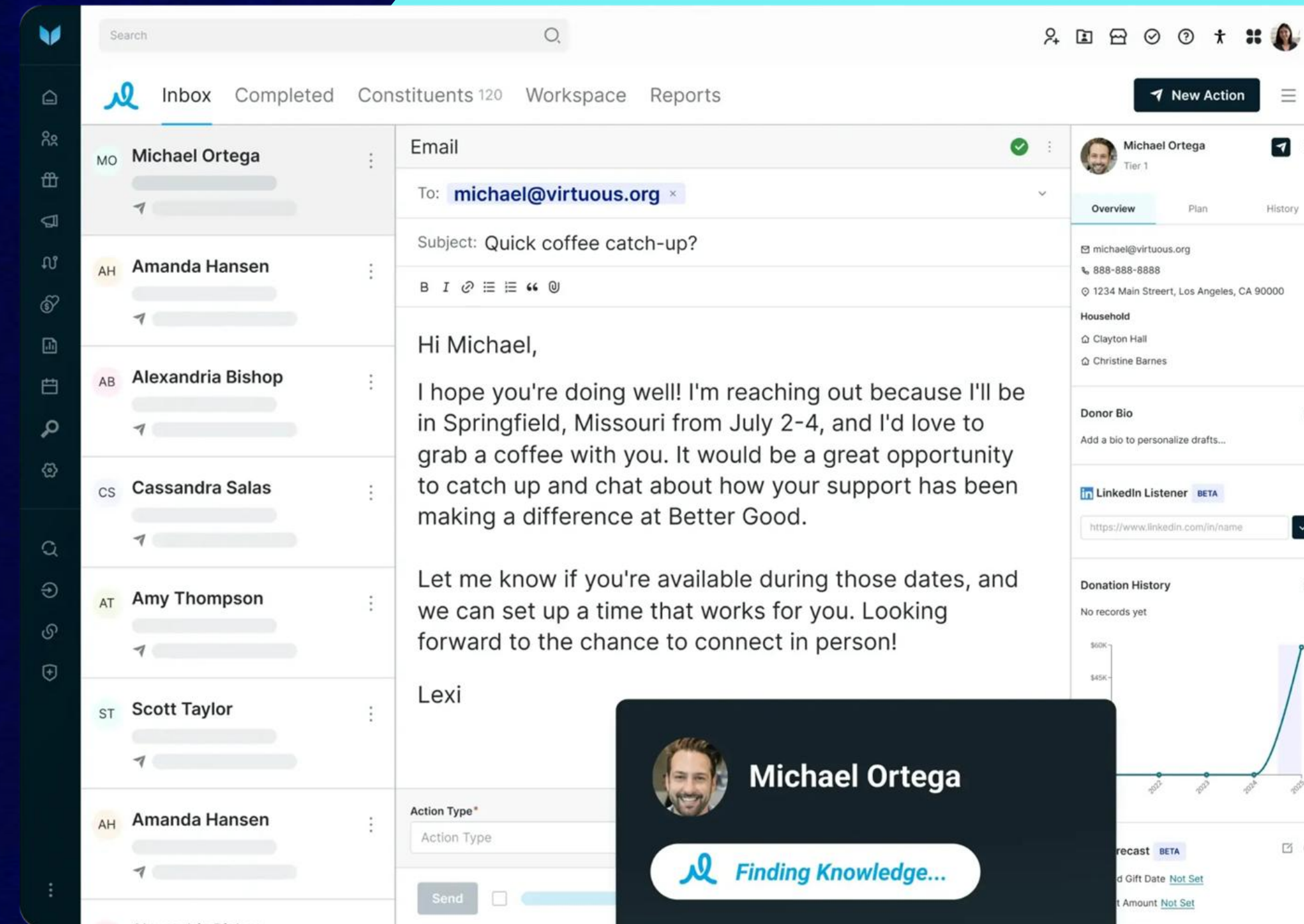
No rip-and-replace required

3x major gift outreach with the power of AI Agents

WHAT MAKES IT DIFFERENT

- 01 AI email drafting based on donor signals in your tone & style
- 02 Directly connected to your inbox
- 03 Never miss an opportunity AI donor journey orchestration
- 04 Sync data to your CRM with no work

[Schedule a Momentum Demo](#)





Michael Ortega

 Finding Knowledge...

- Donated **\$100k** over **6 years**
- Last spoke to Robert **3 weeks ago**
- Next expected gift is **next month**

Q&A