Beyond “Using AI”

A practical guide to predictive, generative, and agentic fundraising

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Philanthropy-first intelligence, built for every stage of the fundraising journey.

Intelligence

- AI-Powered Prospect Research
- Social and Digital Engagement

Outreach

- Personalized Video
- Direct Mail
- Fundraising Automation

Stewardship

- Endowment Accounting
- Endowment Reporting
- Digital Endowment Reporting

DonorSearch | Signal | ThankView | Pledgemine | Balance | Impact | ODDER

Speaker



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Head of AI Growth, EverTrue

Co-Host, Fundraising.AI Podcast

Co-Author, Nonprofit AI

Three Types of AI. Three Different Jobs.

The tools are different. The work is still yours.

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Three Types of AI in Fundraising

Predictive

Analyzes historical data to forecast outcomes

Who will give? How much? When?

Generative

Aggregates data to produce new content

Draft this appeal. Write this grant. Summarize this prospect.

Agentic

Autonomously plans and executes multi-step tasks

Research prospects, segment, draft outreach, schedule sends, and log it all.

Predictive AI: Prioritize Your Donors

Machine learning models trained on your donor data (giving history, email click-throughs, digital engagement, etc.) to forecast future behavior, finding patterns across thousands of data points that no human could detect.

2.3% **of nonprofits use predictive AI to find mid-level and major donors**

Predictive AI addresses the Generosity Crisis

Source: Nonprofit Tech for Good

What Predictive AI Does for Fundraising

Donor Scoring
Score every constituent for likelihood to give

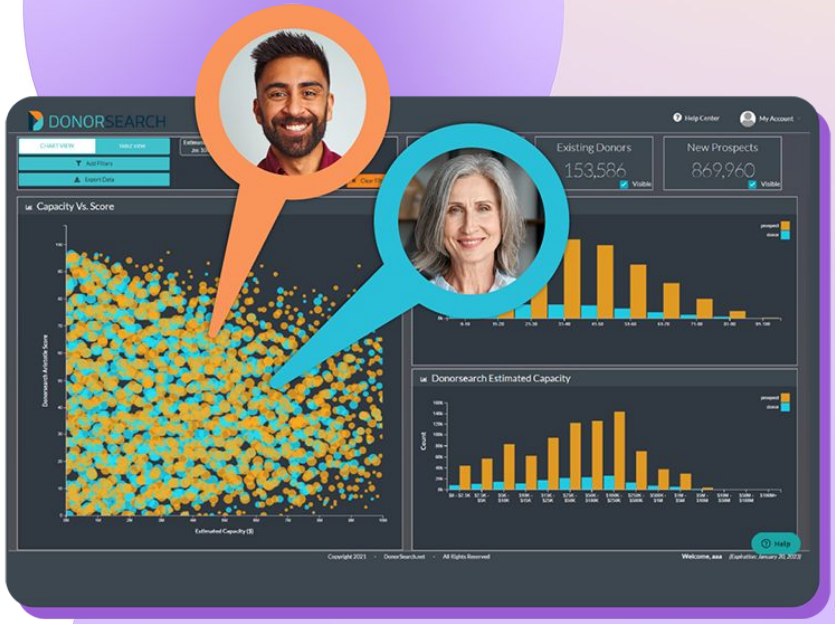
Major Gift Identificaiton
Find hidden major gift prospects in your database

Upgrade Potential
Identify those likely to increase their giving substantially

Acquisition Likelihood
Determine potential for first gift

Lapsed Donor Modeling
Flag at-risk donors before they lapse

Planned Giving Propensity
Identify bequest and legacy gift prospects



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Predictive AI in Practice

$2M

raised from a single donor
identified by one screening — in 6 months

DonorSearch Ai Client Results

$50K

gift closed from a $5K annual donor
in a two-week timeframe

DonorSearch Ai Client Results

93%

reduction in direct mail volume
while increasing revenue by 10%

DonorSearch Ai Client Results

~10x

increase in gift size from higher-scoring
donors, regardless of capacity

DonorSearch Ai Client Results

Generative AI: Personalize Your Output

Large language models that create new content by synthesizing vast amounts of data. In fundraising, they draft outreach in each gift officer's voice, generate prospect briefings, and create personalized stewardship content at scale.

86% **of nonprofits are exploring generative AI**

Generative AI addresses burnout

Source: TechSoup × Tapp Network, State of AI in Nonprofits

What Generative AI Does for Fundraising

Appeal Letters
Draft direct mail and email campaigns in minutes

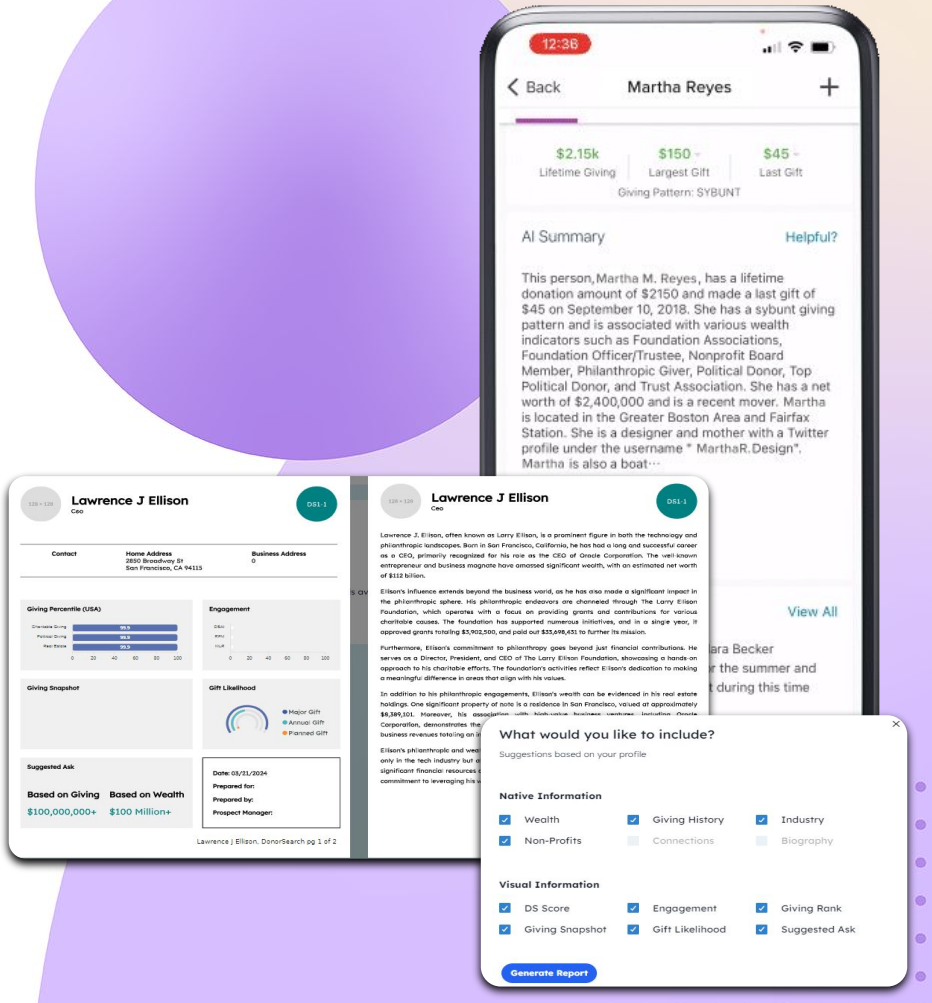
Donor Stewardship
Personalized thank-you notes at scale

Prospect Summaries
Synthesize research into briefing documents

Grant Writing
Analyze RFPs, draft narratives, repurpose proposals

Social Media
Posts, captions, platform-optimized content

Content Repurposing
Annual reports → social posts → email series



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Generative AI: The Numbers

66%

productivity improvement for nonprofits using Generative AI

Google.org, Nonprofits & Generative AI

50%- 70%

reduction in proposal writing time

Grantable / Grant Writing Academy

30%

increase in grant success rates

Technology Association of Grantmakers

13%

increase in email click-through rates

G2, via Nonprofit Tech for Good

Agentic AI: Execute on Your Actions

AI systems that autonomously plan and execute multi-step tasks — with human oversight at critical checkpoints. In fundraising, this means the system identifies who's ready, queues the right touchpoint, and keeps every prospect moving through the pipeline.

1.2% **of nonprofits currently use agentic AI**

Agentic AI addresses staffing challenges

Source: Nonprofit Tech for Good

What Agentic AI Does for Fundraising

Prospect Research Workflows	Segments prospects showing capacity and readiness signals, compile enriched profiles automatically
Donor Journey Orchestration	Cadence-based outreach that queues the right touchpoint at the right time across the full pipeline
Grant Reporting	Pull outcome data, format per funder requirements, generate reports
Multi-Channel Campaigns	Coordinate email, phone, personalized video, and direct mail from a single workflow

Agentic AI: Early but Promising

192%

average ROI reported by enterprises deploying agentic AI in the US

90%

cost reduction per task vs. human execution

10 hrs

saved per staff member every week

Results from for-profit sector

Source: Salesforce, Agentforce ROI Report

The Complete Picture

	Predictive	Generative	Agentic
What it does			
How you interact			
Fundraising example			
Function			
Current adoption			
What it addresses			

The Technology Is Ready. The Culture Is Up to You.

The State of AI in Fundraising

92%

of nonprofits are using AI

Only 7% report major impact on capability

Successful adoption is 10% tool, 20% data, 70% culture.

Source: Virtuous/Fundraising.AI 2026

The Fundraising.AI Framework

10 Principles for Responsible and Beneficial AI

- Privacy & Security
- Data Ethics
- Inclusiveness
- Collaboration
- Transparency
- Continuous Learning
- Accountability
- Legal Compliance
- Social Impact
- Sustainability

The only responsible AI framework built specifically for fundraising.

Source: Fundraising.AI

Your Next Steps

1

Audit Your AI Use

Map what your team is already using. Individual experiments or shared workflows? Document it.

2

Build the Culture First

Adoption is 70% culture. Form AI committees with diverse perspectives. Create psychological safety to experiment and fail. Host Lunch & Learns to educate staff.

3

Keep AI Informational, Not Relational

Automate tasks that support relationships. Never automate the relationship itself.

4

Layer Intelligently

Start with predictive (prioritizing your donors), add generative (personalizing your communications), prepare for agentic (executing workflows autonomously).

Interested to learn how EverTrue is putting AI into practice for fundraising teams?

Let's continue the conversation.

✔ Scan this QR code and fill out the form to access these slides

What is blocking AI transformation at your organization?

Let us know by completing the survey



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Thank You

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fundraising.ai/framework