



# Equitable Philanthropy

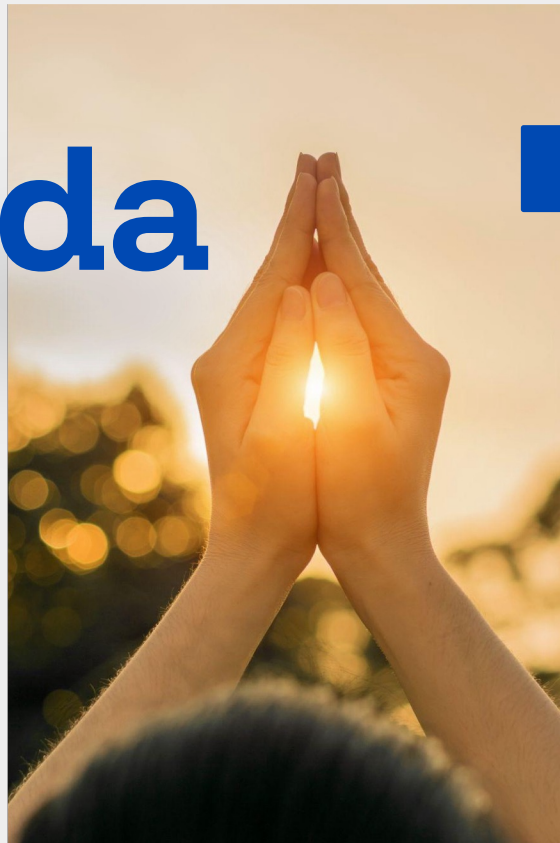
Finance Week 2025

*Supercharge your fundraising with AI Tools, templates  
& policy tips to work smarter and build stronger donor  
relationships*

# Agenda

**Remember:** Use AI to amplify, not replace, the human side of fundraising

“AI is here to assist, not replace. It gives fundraisers more time to do what only humans can – build trust, listen deeply, and connect authentically.”



## 0 Professional Background

- 1 How AI is reshaping the fundraising landscape
- 2 The benefits and risks of AI adoption
- 4 Practical examples and tools
- 5 AI Fundraising Policy
- 5 What Funders Are Saying about AI

# Professional Biography

## Catherine Brooks

- Catherine acts as the bridge between funders and charities
- Practicing lawyer – Catherine has been working in the Not for Profit sector for 18 years (in VIC, NSW and QLD)
- Council Member – Institute of Community Directors Australia
- Certificate in AI for Marketing and Fundraising  
*Nonprofit Tech for Good*
- Developing AI Strategy  
*RMIT – currently completing*
- Donor – Geelong Community Foundation, Monkey Baa theatre company and Bridge It



## Free tools and resources



*Checklists*



*White Paper*



*Policy*



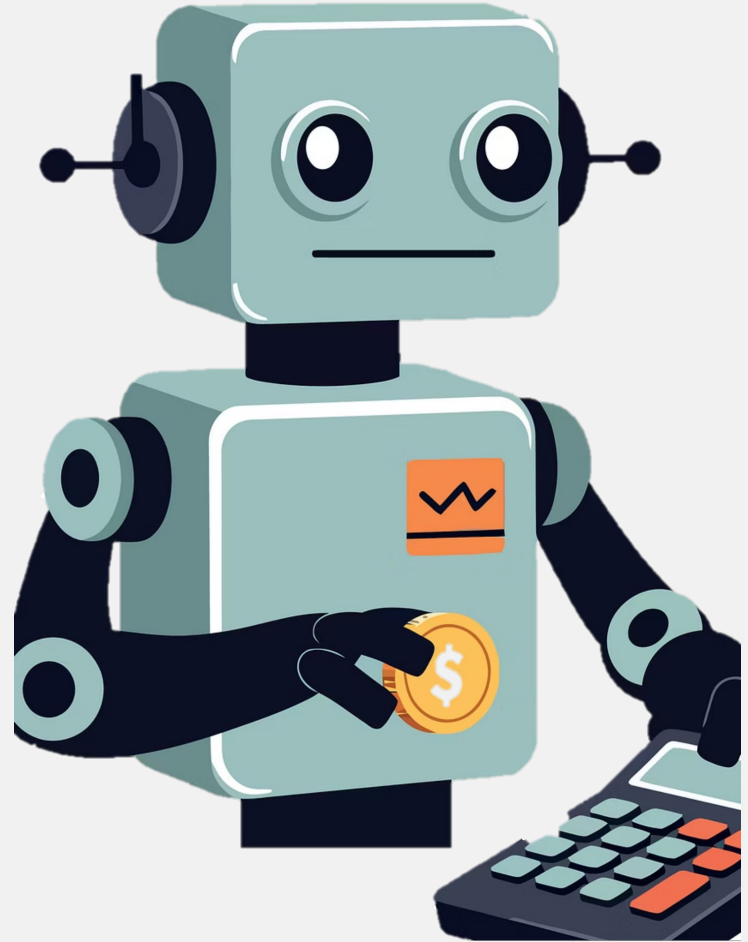
*Resource Shelf*

<https://www.epadvisory.co/>



## *Next Million-Dollar Donor Not a Person, but an Algorithm?*

The future of philanthropy is already being shaped by artificial intelligence, creating opportunities for organisations of all sizes to access resources previously beyond reach.



## *The Rise of Tech in Fundraising*

80% of charities believe digital fundraising is essential  
— but only 30% feel ready

New tech is changing how donors give and how orgs ask

Shift from manual to algorithmic decision-making

Opportunity to scale, but also to fragment trust

# *How AI is Already Transforming Fundraising*

These technologies are becoming increasingly accessible to organizations of all sizes, revolutionizing how non-profits engage with donors and manage operations. AI's capabilities are enhancing efficiency, personalisation, and security in the fundraising landscape.



## *Predictive Donor Analytics*

AI algorithms identify potential major donors by analyzing giving patterns and engagement history, allowing for data-driven outreach.



## *Personalized Communications*

AI-generated emails and content are tailored to individual donor interests and past behaviors, fostering stronger connections.



## *24/7 Donor Engagement*

Chatbots provide immediate responses to donor inquiries and support, ensuring continuous accessibility and improved donor experience.



## *Enhanced Security*

Fraud detection systems utilize AI to protect both cryptocurrency and traditional donations, safeguarding valuable contributions.



# What Is Artificial Intelligence?

## Definition

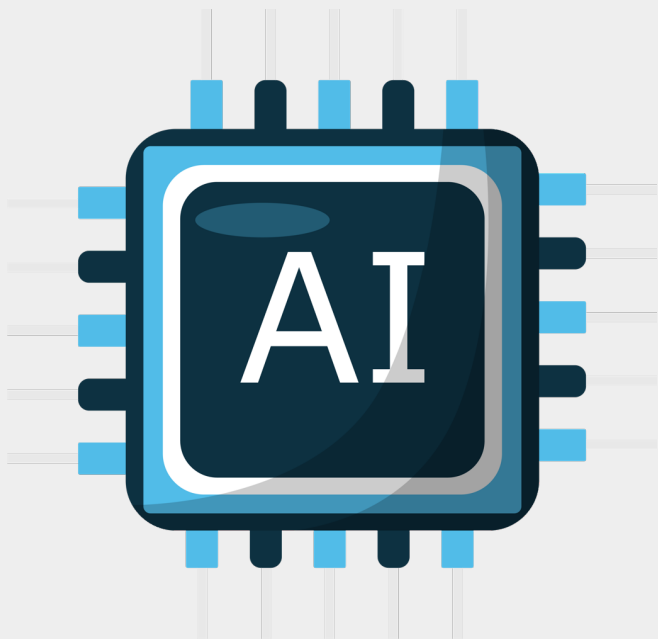
- “artificial intelligence (AI) as applying advanced analysis and logic-based techniques, including machine learning (ML), to interpret events, support and automate decisions, and take actions”





# *What Is Artificial Intelligence?*

<b>Artificial intelligence (AI)</b>	Any technology that enables machines or technologies to act with human-like behaviour.
<b>Machine learning (ML)</b>	A subset of AI. The science of getting machines to learn and act in a human-like manner and improve with experience.
<b>Deep learning (DL)</b>	A subset of ML. Similar to ML but able to work with much larger and more complex data sets and therefore perform far more complex tasks.
<b>Generative AI (Gen AI)</b>	Generative AI is a branch of deep learning that can produce new content, such as text, images, or music. It employs large language models capable of learning complex patterns to generate human-like outputs.



## What Are We Talking About?

*There are two primary types of AI nonprofits are using:*

### *Generative AI (e.g., ChatGPT)*

Creates content like text, images, or video.

### *Predictive AI (e.g., DonorSearch AI)*

Makes predictions based on data patterns to inform fundraising strategies.

***Real-world examples:*** donor segmentation, impact storytelling, case for support drafting, admin automation

# The Benefits

## Opportunities:



### *Increased Efficiency*

AI can automate repetitive tasks, freeing up fundraising staff for the crucial work of relationship-building.



### *Data-Driven Insights*

AI helps tailor campaigns to donor interests and behaviors with unprecedented precision, enhancing engagement.

## Research demonstrates that:

**58%**

*of nonprofits*

are using AI for communications strategies.

**68%**

*of nonprofits*

are using AI for data analysis.

These rates are higher than business to consumer businesses — 47% and 64% respectively. ([The Profit Times](#))



## *Two sources of AI tools*

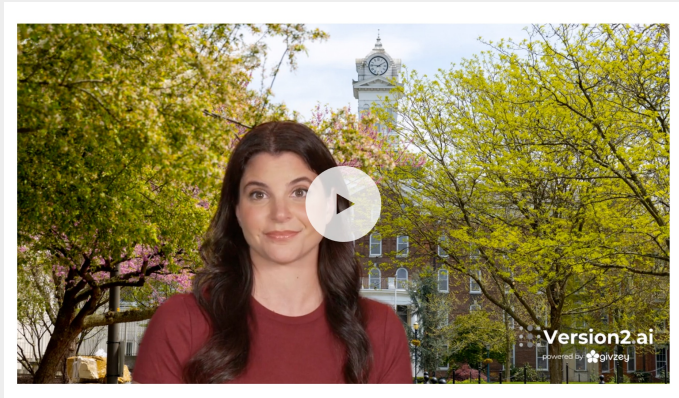
### *Standalone AI platforms and plug ins*

Eg. Chat, Fundraise Up etc

### *AI embedded in existing systems*

Eg. Canva AI tools, Datara  
add-ons etc.

## *And then there's the next frontier*



**Example:** Virtual Engagement Officers

- <https://www.kutztownfoundation.ai/>
- [https://youtu.be/AjDMil7fOJI?si=fo69SV\\_NFhXaYSZp](https://youtu.be/AjDMil7fOJI?si=fo69SV_NFhXaYSZp)

# **Success Story:** *The Kids' Cancer Project*

**\$2.2M**

## ***Annual Donations***

Nearly doubled regular donations through AI implementation

**30%**

## ***Donor Growth***

Year-on-year increase in regular donor acquisition

**15%**

## ***Research Investment***

Boost in funding directed to cancer research initiatives



## ***Implementation Strategy***

Partnered with SAS to implement AI solutions for automated financial processing and donor data analysis, helping identify potential larger donors and streamline operations



# Success Story: Charity: Water

## Challenge

Donor attrition was limiting sustainable funding for clean water projects in developing countries

## Implementation

- Developed early warning system for at-risk donor relationships
- Created personalised intervention strategies for different donor segments
- Automated timely communication to re-engage potential lapsed donors

## AI Solution

Implemented machine learning algorithms to predict when donors might lapse based on engagement patterns and giving history

## Impact

Significantly reduced donor attrition rates through targeted, timely outreach, creating more sustainable funding streams for global water projects



# Artificial Intelligence

## Core Risks

### Ethical Concerns:

- How do we ensure AI decisions are explainable and non-discriminatory?
- How do we safeguard donor data under privacy laws (e.g., Australia's Privacy Act 1988)?
- How do we manage the volatility of crypto-based donations?

NB: Refer to toolkit for resources to deal with these questions



### Risks:

- Data privacy and bias: AI models can perpetuate biases or mishandle sensitive donor data.
- Fraud
- Reputational harm: Missteps with new technologies can damage a charity's credibility.

# *Ethical Fundraising in the Age of AI*

***Common concerns:*** accuracy, bias, plagiarism, donor trust

***Best practices:*** human oversight, attribution, keeping donor data safe

***Equitable Philanthropy AI Checklist & Policy***

# Risk Management in Tech-Enabled Fundraising

<i>Risk</i>	<i>Mitigation Strategy</i>
Platform failure	Choose reputable providers; have contingency
Legal non-compliance	Legal review; check state/territory laws
Donor data privacy breach	Use encrypted platforms; internal training
Fraudulent donations	Crypto vetting tools; ID verification
Misuse of funds	Internal tracking, public updates, audits

# Is Your Organisation Tech Ready?



We have a digital fundraising policy (refer to template Equitable Philanthropy provided)



Our team has baseline digital skills



We've assessed legal and ethical risks of new tech



We use secure, compliant platforms



We can track and report donor impact digitally



We've tested at least one tech-enabled fundraising tool

# AI Mindset Spectrum

<i>Gloomers</i>	<i>Zoomers</i>
<i>"Yeah But..."</i>	<i>"Oh Yes!"</i>
Cautious	Optimistic
Emphasise near-term risks	Focused on rapid innovation
Support regulation and oversight	Prefer minimal regulation to drive progress
Precautionary regulation	Permissible innovation

## Zoomer Voices: *What If It All Went Right?*

"It'll be 10 times bigger and maybe 10 times faster than the Industrial Revolution." – *Demis Hassabis*

"Radical Abundance is possible within 5–10 years if AI is developed responsibly." – *DeepMind (via Hassabis)*

"College Graduates today are the luckiest generation in history." – *Sam Altman*

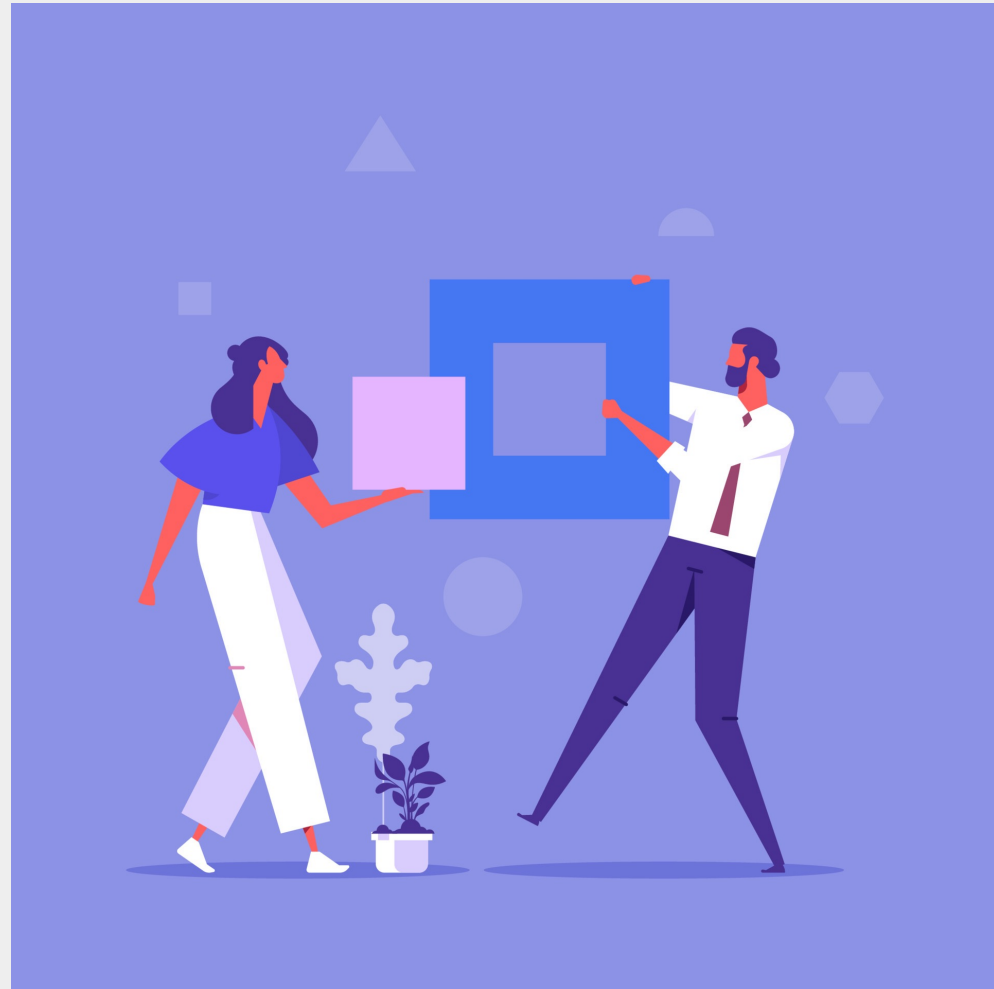
"By 2045, AI will expand intelligence a millionfold." – *Ray Kurzweil*

"Artificial Intelligence is the new electricity." – *Fei-Fei Li*

# *First Mover Advantage*

“High digital maturity” orgs are significantly more likely to meet or exceed fundraising, program, marketing, and mission goals than low-maturity peers

**85%** more likely to have met/exceeded fundraising goals vs **66%** of low-maturity orgs





# *Beginner AI Use (exploring and experimenting)*

## *Focus: Efficiency and curiosity*



### **CONTENT CREATION**

To draft donor thank you letters  
Simple grant copy  
Blog posts with AI help



### **RESEARCH AND IDEAS**

Quick fact-finding (e.g. trends in philanthropy),  
brainstorming campaign names and ideas



### **ADMINISTRATION**

Summarising board papers, staff notes, or meeting  
minutes



### **IN-TOOL AI FEATURES**

Using Canva AI for design tweaks, Microsoft Copilot for  
document drafting, Grammarly AI for editing

# *Intermediate AI Use (embedding into workflows)*

## *Focus: Productivity and consistency*



### **CONTENT CREATION**

Building reusable prompt templates for pitch documents, grant proposals and social media content



### **RESEARCH AND IDEAS**

Automated funder scans, extracting key themes from transcripts, analysing donor data



### **ADMINISTRATION**

Automating repetitive tasks like data cleaning, CRM note summarization, meeting transcriptions



### **IN-TOOL AI FEATURES**

Scheduling and A/B testing email campaigns in Mailchimp with AI, using Canva Magic Studio for campaign assets

# *Advanced AI Use (transforming strategy & impact)*

## *Focus: Innovation and organizational change*



### **CONTENT CREATION**

Training AI models on your organization's past fundraising materials to generate consistent, tailored outputs



### **RESEARCH AND IDEAS**

Predictive donor segmentation, forecasting campaign income, risk modelling for grants



### **ADMINISTRATION**

AI-driven compliance and due diligence checks, automated reporting dashboards



### **IN-TOOL AI FEATURES**

Advanced integrations (eg. Salesforce Einstein for donor predictions, Microsoft Copilot across Teams/Outlook for strategic insights)

# First Activity

## Step 1: Choose your AI

Chat, Claude, Gemini etc

## Step 2: Tell it your role

Insert as much information about your responsibilities– duties, tasks, KPIs, structure, donor type (major donor, location), focus area etc

## Step 3: Prompt

Ask AI how you could be using AI to 10x your impact and work

## Step 4: Test it out – pick 2–3 ideas

Pick a couple of ideas to test / trial



# Second activity: choose your AI note taker

## Step 1: Choose your note taker

Choose one that not only takes notes but summarises meetings and action items

## Step 2: Use the data

Use the info gathered in the meeting to determine next steps, problem solve, and come up with creative ideas

## Step 3: Deliver on actions

At the end of meetings, determine next steps, act on action items in record time and produce outputs and ideas you wouldn't have come up with otherwise

## Step 4: Test and train

Top tip: always show chat your finished product, client feedback, finalised versions etc and then it improves each time

Every time you use a tool check in with yourself – did it make your process better, faster and more impactful? If not, how can you improve?



# Become a prompt engineer

## Top tips to train your agent

### Step 1: Be clear and specific

Give context, role and goal

### Step 2. Break it down and give examples

Step by step tasks and give examples of best practice outputs

### Step 3: Iterate and refine

First outputs are drafts, provide feedback to improve upon, play around with tone, format and persona

### Step 4: Save your best prompts

Build a reusable library, optimize efficiency through training your agent with your preferences, best outcomes etc

The key is not to memorise one perfect prompt, but to **practice, test, and build your own toolkit** so AI becomes a partner in your work.



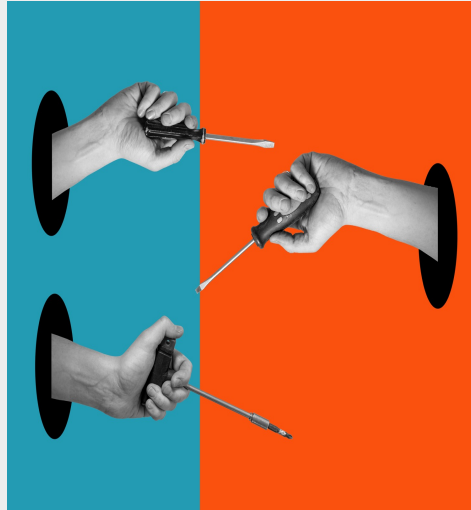
# Example tools to highlight

More examples in white paper on [epadvisory.co](https://epadvisory.co)

1

## *Fundraise Up*

Smart, AI-powered donation platform built on 80+ non-PII data points, helping nonprofits worldwide boost conversion, personalise the giving journey, and scale donations with sleek checkout tools and seamless integrations.



2

## *Handwrytten*

AI-powered service that uses robots holding real pens to generate authentic handwritten notes—delivered physically—to help businesses and individuals scale personal, impactful outreach



# AI Fundraising

## Activities and tasks to test out tools

### ***Activity A***

Is your Charity  
Findable?

### ***Activity B***

Is Your Website  
Major Donor  
Ready?

### ***Activity C***

Crafting a Thank-  
You Email

### ***Activity D***

Review Social  
Media Through a  
Donor Lense

# What Funders Expect

## *Top Priorities Identified by Funders:*

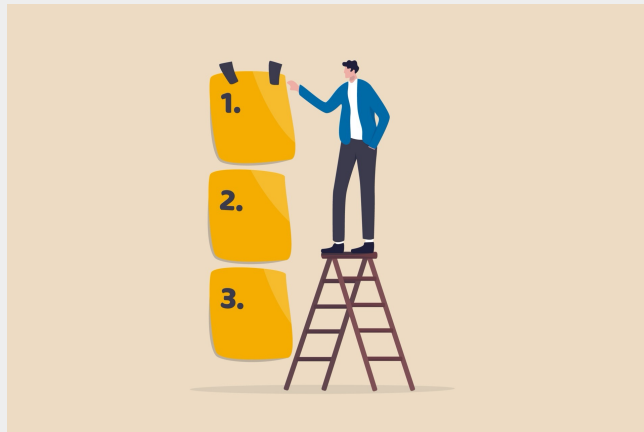
*Transparency and accountability in tech use*

*Responsible data collection and use*

*Ethical storytelling (esp. in AI-generated content)*

*Confidence in legal compliance*

*Innovation that aligns with mission*





## What Funders Expect

*Amy Waters, CEO, Geelong Community Foundation, advises:*



***“It is essential that charities do the initial work to clearly define the activity that they are seeking funding for. This can’t be AI driven. It needs to be informed by the applicant’s understanding of their target group and their real-world experiences in supporting their beneficiaries.”***

## What Funders Expect

*Amy Waters, CEO, Geelong Community Foundation*

*Practical advice:*

- 1. Develop your program logic and theory of change without AI.*
- 2. Use AI to refine communications, not design strategy.*
- 3. Validate AI-identified data sources with real-world experience.*



## What Funders Expect

*Gill Whelan, Decjuba Foundation, recommends:*



***“I would encourage charities to use any tools at hand that they feel can save them time and/or give them an edge when it comes to fundraising. But AI tools should be used as a starting point only. Make sure you imbue your writing with the unique tone of your organisation to avoid sounding like everyone else.”***

# What You Can Do Tomorrow

"At the heart of every successful digital transformation in fundraising remains what has always mattered most: trust, authenticity, and human connection.

You don't need a million-dollar budget or a dedicated tech team to start. Begin by understanding where you are today. Pilot one new tool. Build internal confidence. Most importantly — keep donors at the centre.

## *Audit Tools*

Are you already paying for tools that you could be utilising more effectively?

What do you want to add to your toolkit? Highly recommend paying for tools like ChatGPT for efficiency and security

## *Play around with tools*

Commit to getting through the activities in this workshop.

20 mins per day reading, researching and playing around with AI. Refer to Resource Shelf on Equitable Philanthropy Substack for more.

## *Complete AI Fundraising Policy Questions*

Get the whole organization on the same page about what you're using, what successes you've had and how you can build on that.

Answer the questions in the checklist then develop your policy.

## *Be the changemaker*

Now is the time for your organisation to innovate, lead the way and you can be a changemaker.

Maximise your impact for good via AI and supercharge your work and fundraising efforts.

# Equitable Philanthropy

## AI Services



### ***AI Strategy & Leadership for NFPs***

Equip your board and executive team to lead AI adoption with confidence, clarity, and ethical oversight.



### ***Fundraising & Communications Transformation***

Harness AI to streamline grant writing, donor engagement, and storytelling—freeing up time to focus on impact.



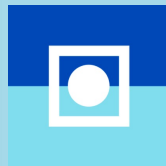
### ***Ethics, Compliance & Risk Management***

Identify and manage the legal, ethical, and reputational risks of AI in your organisation.



### ***Custom Tools, Frameworks & Training***

Access tailored prompt packs, readiness checklists, and policy precedents—plus real-world case studies and practical workshops.



# Thank you

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