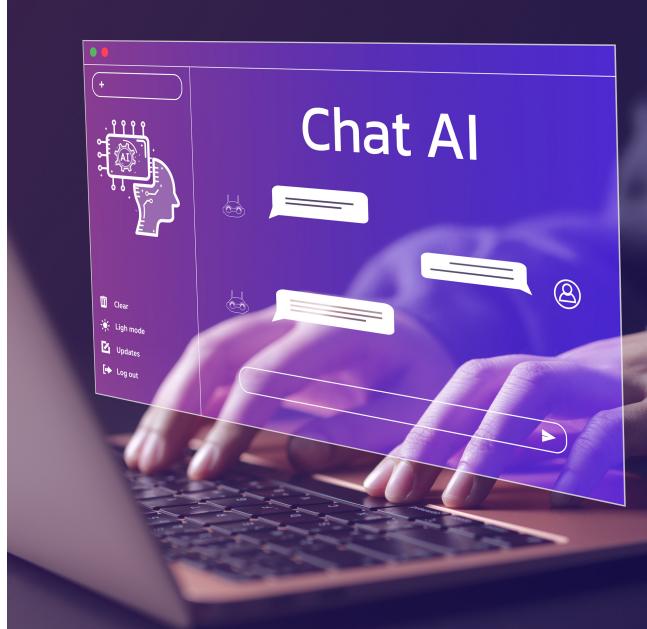


Unlocking AI

Practical Applications for Nonprofit Fundraising



Introductions



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AI Overview & Timeline

Topics, tools, and terms to know

3 Privacy & Security

1

What information to provide (and not provide) AI

5 Organizational Policies & Ethics

Safeguards to ensure AI is deployed safely and responsibly

7 Questions

Closing with a Q&A

2 Prompt Engineering Fundamentals

How to properly set up chats and general prompting best practices

4 Use Cases for Fundraisers

Beginner, intermediate, and advanced scenarios, with example prompts

6 Key Takeaways & Resources

Recap and next steps

Agenda



Al Overview

overview Timeline

November 30, 2022 – OpenAI releases ChatGPT

March 21, 2023 – Google launches Bard

March 22, 2023 – Elon Musk, Steve Wozniak, and others sign an open letter calling for a pause on AI development

July 18, 2023 – Meta, Facebook's parent company, releases LLaMA-2 as open source

October 30, 2023 – President Biden issues an executive order on safe, secure, and trustworthy AI

November 6, 2023 – OpenAI launches GPTs and other powerful new features

November 17, 2023 – OpenAI fires CEO Sam Altman

November 20, 2023 – Microsoft hires Altman

November 21, 2023 – Altman returns to OpenAI

Breaking News!

<u>Google Updates Bard Chatbot</u> <u>With 'Gemini' A.I. as It Chases</u> <u>ChatGPT (NYT)</u>

OVERVIEW

Glossary

API: Application Programming Interface, a set of rules and protocols that allows different software systems to communicate with each other.

Chatbot: A software application used to conduct an online chat conversation via text or text-to-speech, simulating how a human would behave as a conversational partner.

Hallucination: False or misleading information generated by an AI system that is presented as fact.

Large Language Model (LLM): A type of artificial intelligence model trained on massive volumes of text data to generate human-like writing using predictive algorithms.

Examples: GPT-4, Llama, PaLM, Claude

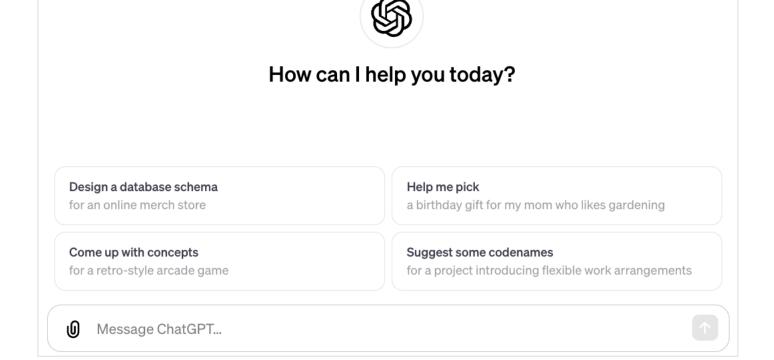
Prompt: A prompt is a user-provided input or instruction that triggers an AI model to generate a response or perform a specific task.

Prompt engineering: Prompt engineering involves crafting inputs or queries in a way that steers an AI model towards producing the desired output or behavior.

Token: The basic unit of text that natural language processing models use to break down and rebuild sentences; important for understanding input and output lengths.

CHATBOTS ChatGPT

Go Deeper: <u>Read Zapier's Roundup</u> of the best AI chatbots for 2024

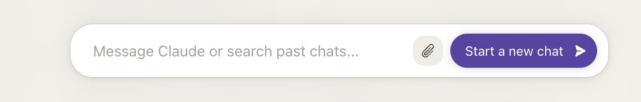


- Generally considered to be better at complex reasoning than other chatbots
- Free and Pro plans
- ChatGPT Plus subscription (\$20/user/month) provides advanced features: GPT-4, DALL·E, web browsing, advanced data analysis, and <u>custom GPTs</u>

CHATBOTS Claude

Go Deeper: <u>The Biggest Differences</u> Between Claude AI and ChatGPT ANTHROP\C

Welcome back, Aaron



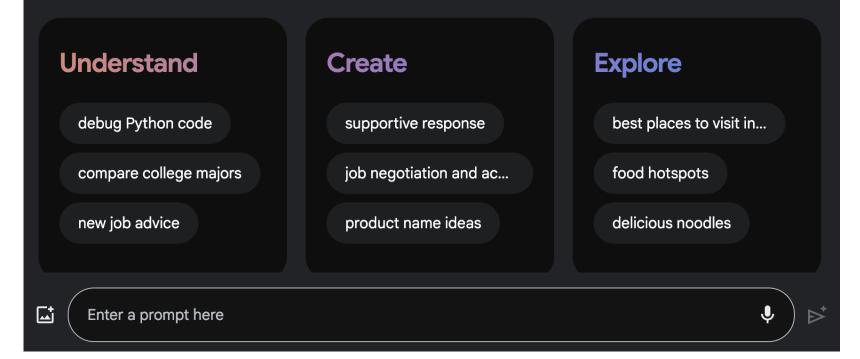
- 100k token context window...200k as of Nov. 21!!!
 - Roughly 150,000 words vs ChatGPT's 12,000
- Excellent at remembering conversation history and context
- Generally considered to be better for creative tasks

Bard

Go Deeper: Bard vs ChatGPT

Hi, I'm Bard

Tell me what's on your mind, or pick a suggestion.

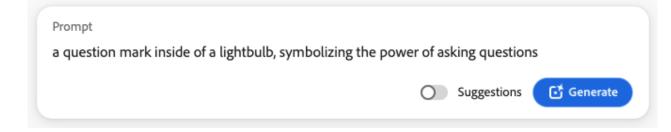


- Integrates with Google workspace, including Gmail, Drive, & YouTube
- Can browse the web (for free)
- Provides up to three drafts of each response

IMAGE GENERATORS

Midjourney Dall•E Stable Diffusion Firefly Canva





Source: <u>Powerful Questions for Coaching Fundraisers</u>, image created via Adobe Firefly

AUTOMATION PLATFORMS

Zapier & Make.com

Automation platforms are tools that connect different software applications, automating tasks and workflows. They enhance efficiency in fundraising by seamlessly integrating AI tools with existing systems.

Key Benefit: These platforms streamline fundraising operations, reduce manual workload, and enable more strategic focus on donor relationships and engagement.

Privacy & Security

What to Provide (and not provide) AI

Be extremely selective about sharing any sensitive prospect/donor information with an AI system.

Only information that is considered public knowledge should be provided to AI tools and systems.

• This includes things like publicly listed professional bios and public social media profiles.

What to Provide (and not provide) AI

Avoid sharing or entering any private details that were obtained through special access or relationships. The AI doesn't need – and shouldn't receive – this info.

• Unlisted contact info, donation amounts, personal connections, etc.

When integrating AI with internal databases or tools, work closely with your IT/security team to implement access controls, API keys, role-based permissions, and auditing capabilities. Never provide open access to your entire database.

What to Provide (and not provide) AI

Leverage trusted AI providers who can demonstrate a commitment to ethics, security, and responsible data practices. Review their policies closely.

Conduct regular audits of the data provided to AIs and the access controls in place. Stay vigilant about monitoring where prospect data resides. Prompt Engineering

Hope for Health

Mission: Hope for Health seeks to expand access to mental health services and support for underserved communities. We work to reduce stigma, raise awareness, and empower those living with mental illness

History: Hope for Health seeks to expand access to mental health services and support for underserved communities. We work to reduce stigma, raise awareness, and empower those living with mental illness

Funding Needs: Hope for Health seeks to expand access to mental health services and support for underserved communities. We work to reduce stigma, raise awareness, and empower those living with mental illness

Programs:

- Community education campaigns to promote mental health awareness
- Free counseling and therapy services
- Support groups and workshops
- Mental health first aid training
- Crisis prevention and intervention

Brand Voice & Tone:

- Friendly, hopeful, supportive.
- Avoids clinical/sterile language.
- Focuses on empowerment and resilience.

PROMPT ENGINEERING Best Practices

Act as a persona to tailor tone

Act as a professional fundraiser for Hope for Health, and write...

↑

Provide more detail in prompts without sensitive info

Act as a professional fundraiser for Hope for Health, and write a thank you note to a loyal donor who contributed \$500 to our organization's counseling services. She's been volunteering with Hope for Health for 4 years, and she is really passionate about free therapy services for those that need it.

PROMPT ENGINEERING Best Practices

Give precise parameters for length

Write a one-page solicitation letter to ask prospects to make a gift to our counseling services before the end of the calendar year.

Provide guidance about voice, tone, style, etc.

Create language for Hope for Health's website to share information about their comprehensive campaign. Use the voice, tone and style of Hope for Health, which includes: Voice: Friendly, hopeful, supportive. Tone: Avoids clinical/sterile language. Style: Focuses on empowerment and resilience.

#ProTip: Don't have a style guide? Have AI analyze your content and create one for you!

Best Practices

Break down complex tasks into multiple prompts

Bad: Create a year-end fundraising campaign, including an appeal letter, email reminders, and social media posts. The appeal letter should be 5 paragraphs long, the email two paragraphs long, and the social media post a single paragraph.

Good:

- Prompt 1: Create a year-end appeal letter...
- Prompt 2: Draft a reminder email...
- Prompt 3: Write a social media post...

By inputting several resources

I'm going to feed you several pieces of information. Your task will be to create a proposal template for philanthropic support to our counseling services. After each resource is provided, ask for the next resource. I'll tell you when all resources have been provided and when to proceed with writing the proposal template.

Best Practices

Edit prompts and build on responses in same chat

You

To accompany the mailed and emailed appeals, write 2 short posts for social media encouraging our followers to make a gift before the end of the year. Not only will their support help raise much-needed funds for our campaign, but donors can take advantage of tax benefits.



Ms You

To accompany the mailed and emailed appeals for expanding our counseling services, write 2 short posts for social media encouraging our followers to make a gift before the end of the year. Not only will their support help raise much-needed funds for our campaign, but donors can take advantage of tax benefits. All gifts will support our campaign.



Best Practices

Always review output carefully.

Always.





national_archaeology

10

 \square

39,111 likes

national_archaeology Sail Amsterdam is indeed an exciting event! Unfortunately, as an Al language model, I can't experience events in real-time, including the latest Sail Amsterdam event. However, I can provide you with some information about Sail Amsterdam and its significance.

Sail Amsterdam is a large maritime event that takes place in Amsterdam, Netherlands. It occurs every five years and attracts numerous tall ships, historical vessels, and modern

LEVELING UP ChatGPT Custom Instructions

Custom instructions allow you to add preferences or requirements that you'd like ChatGPT to consider when generating its responses. Custom instructions (i)

What would you like ChatGPT to know about you to provide better responses?

- Where are you based?
- What do you do for work?
- What are your hobbies and interests?
- What subjects can you talk about for hours?
- What are some goals you have?

0/1500

How would you like ChatGPT to respond?

- How formal or casual should ChatGPT be?
- How long or short should responses generally be?
- How do you want to be addressed?
- Should ChatGPT have opinions on topics or remain neutral?

Cancel

0/1500

Enable for new chats

Al Use Cases for Fundraisers

Thank You Note After A Visit

Version 1 Prompt

Act as a professional fundraiser, and write a brief thank you email to the prospect after you met with her. Share how a gift to the campaign will allow us to open more counseling offices and how nice it was to reconnect with her. Share how grateful you are for her consideration.

USE CASE | BEGINNER Thank You Note After A Visit

Dear [Prospect's Name],

I hope this message finds you well. It was truly a pleasure to reconnect with you recently and discuss the impactful work that Hope for Health is undertaking to expand access to mental health services. Your commitment to fostering supportive, stigma-free communities aligns seamlessly with our mission, and your thoughtful consideration means a great deal to us.

Our conversation resonated deeply, and I wanted to express our sincere gratitude for your interest in supporting our campaign. Your generous contribution will play a pivotal role in our efforts to open more counseling offices, extending the reach of our services to those in need. Your support will directly translate into providing a lifeline for individuals seeking mental health resources, creating a positive ripple effect within communities. We are truly grateful for your consideration and the potential impact your gift can have on the lives of so many.

Once again, thank you for your time, consideration, and ongoing commitment to mental health advocacy. We are honored to have you as a potential partner in our mission, and we look forward to the positive change we can create together.

Warm regards,

USE CASE | BEGINNER Thank You Note After A Visit

Version 2 Prompt

Act as a professional fundraiser and write a thank you email to the prospect after you met with her. **We discussed her recent promotion and how happy she's at her company**. Share how a gift to the campaign will allow us to open more counseling offices and how nice it was to reconnect with her. Share how grateful you are for her consideration, and **request to set up a call in 2 weeks to talk further about the gift.**

USE CASE | BEGINNER Thank You Note After A Visit

Dear [Prospect's Name],

I hope this email finds you well. It was truly a pleasure reconnecting with you recently and **learning about your well**deserved promotion. Your enthusiasm for your work at [Prospect's Company] is inspiring, and I'm thrilled to hear about the positive developments in your career.

Our conversation about Hope for Health's mission and the impact we aim to make on mental health services left me even more optimistic about the possibilities for positive change. Your thoughtful consideration of supporting our campaign is deeply appreciated. A gift from you would significantly contribute to our efforts to open more counseling offices, allowing us to reach and support even more individuals in need. Your generosity will play a crucial role in fostering supportive, stigma-free communities, empowering those living with mental illness.

I am sincerely grateful for your openness to considering a gift to our cause. Your commitment to making a difference is truly commendable. To further discuss how your support can create a lasting impact, I would like to propose scheduling a brief call in two weeks. This would provide us with an opportunity to explore in more detail how your contribution can contribute to our shared vision. Thank you once again for your time and thoughtful consideration. I look forward to continuing our conversation and working together to make a meaningful difference.

Social Media for Year-End Giving

Prompt

USE CASE | BEGINNER

To accompany the mailed and emailed appeals, write 2 short posts for social media encouraging our followers to make a gift before the end of the year. Not only will their support help raise much-needed funds for our campaign, but donors can take advantage of tax benefits.

USE CASE | BEGINNER

Social Media for Year-End Giving

Post 1:

ightarrow Give the Gift of Mental Health ightarrow

As the year comes to a close, consider making a difference that lasts a lifetime! Your support to our campaign at Hope for Health will help us expand access to mental health services and create stigma-free communities.

Plus, there's a bonus—make your gift before the end of the year and enjoy the added benefit of tax deductions!

Your generosity can make a profound impact. Together, let's empower those living with mental illness and create a brighter future. Click the link in our bio to make your yearend gift today!

#HopeForHealth #YearEndGiving #MentalHealthMatters #MakeADifference

Post 2:

👎 Unlock the Power of Giving and Receive Tax Benefits! 👎

As we approach the end of the year, seize the opportunity to make a positive impact on mental health while also enjoying tax benefits! Your support to Hope for Health's campaign not only helps us open more counseling offices but also allows you to take advantage of tax deductions. 🛠

It's a win-win! Join us in creating supportive, stigma-free communities where everyone has the tools to thrive mentally. Make your gift before the year ends—visit our website or check your inbox for our appeal. Together, let's make a lasting difference! So

#YearEndGiving #HopeForHealth #MentalWellness #TaxBenefits #GiveBack

#ProTip: Include the specific social networks, emoji preferences, and hashtag requirements to the AI.

USE CASE | INTERMEDIATE

Create Briefing Documents

Prompt

Compile a briefing document on Anthony Heaven, Ph.D., including a 3-sentence summary of his bio (<u>https://grahampelton.com/people/</u> and https://www.case.org/antho ny-heaven).

Include key details to prepare for an introductory meeting and a conversation starters based on his background.

I've pasted key details from his LinkedIn bio below...

USE CASE | INTERMEDIATE

Create Briefing Documents

Bio Summary: Anthony Heaven, Ph.D., is an accomplished professional with extensive experience in fundraising and philanthropy. As the Vice President of Graham-Pelton, he brings a wealth of knowledge in higher education advancement, having worked with numerous prestigious institutions globally. With a background in academia, Anthony holds a Ph.D. in Philosophy and has a proven track record of guiding organizations towards strategic and successful fundraising initiatives.

Key Details for Introductory Meeting:

Professional Background: Dr. Heaven has a strong foundation in academia, having earned his Ph.D. in Philosophy. His transition to the field of fundraising positions him uniquely to understand the intersection of education, philanthropy, and organizational growth.

Global Experience: Anthony's work with Graham-Pelton has provided him with a global perspective on fundraising strategies. His insights into diverse philanthropic landscapes could offer valuable perspectives for collaboration and innovation in the fundraising space.

Conversation Starter: "In your role as Vice President at Graham-Pelton, what emerging trends in fundraising do you find most exciting, and how do you envision them shaping the future of philanthropy?"

USE CASE | INTERMEDIATE

Personalized Outreach Emails

Version 1 Prompt

Act as a professional fundraiser for Hope for Health and write a 3-paragraph email to reach out to a prospect and request her to meet. In the email, briefly share excitement over launching a comprehensive fundraising campaign.

Personalized Outreach Emails

Dear [Prospect's Name],

I trust this email finds you well. My name is [Your Name], and I am reaching out on behalf of Hope for Health, a nonprofit dedicated to expanding access to mental health services and support for underserved communities. I have been following your impactful work and believe your insight could be invaluable as we embark on an exciting journey.

We are thrilled to announce the launch of a comprehensive fundraising campaign aimed at furthering our mission to reduce stigma, raise awareness, and empower those living with mental illness. Your expertise and passion for making a positive impact in our communities align perfectly with our goals. I would love the opportunity to share more about our campaign and discuss potential ways your involvement could help us reach new heights.

Could we schedule a brief meeting at your earliest convenience to explore this exciting opportunity together? Your perspective and support would mean the world to us. Thank you for considering this invitation, and I look forward to the possibility of working together to create meaningful change.

Warm regards,

Personalized Outreach Emails

Version 2 Prompt

USE CASE | INTERMEDIATE

Act as a professional fundraiser for Hope for Health. Write a 3-paragraph email to reach out to a prospect, **who's not been very involved**, and request her to meet. In the email, briefly share excitement over launching a comprehensive fundraising campaign, **called "Hopeful Horizons,"** which will provide critical funds to support hiring additional staff, volunteer training programs, and expand our office space to provide additional counseling offices, allowing us to reach more people in need of our mental health services.

Personalized Outreach Emails

Dear [Prospect's Name],

I trust this email finds you well. As we continue our mission at Hope for Health to expand access to mental health services and support, I wanted to share some exciting news with you. We are launching a comprehensive fundraising campaign called **"Hopeful Horizons,"** and I am reaching out to you because we value your potential contribution to this significant endeavor.

The Hopeful Horizons campaign is designed to provide **critical funds that will support the hiring of additional staff, the development of volunteer training programs, and the expansion of our office space to create more counseling offices**. These crucial initiatives will allow us to reach even more individuals in need of our mental health services, making a lasting impact on the well-being of our communities.

I believe your insights and support could be invaluable to the success of this campaign, and I would love the opportunity to discuss it further with you. Could we schedule a brief meeting at your convenience to explore how your involvement could contribute to the success of our **Hopeful Horizons campaign**? Your perspective and support would mean a great deal to us as we work towards creating a brighter and more resilient future for those facing mental health challenges.

Thank you for considering this, and I look forward to the possibility of connecting with you soon.

USE CASE | INTERMEDIATE Major Gift Proposal

Prompt

Write a 1-page proposal for the prospect to review while she considers her gift to support the opening of more counseling offices. Be specific about how her support will allow us to reach more individuals in need. The proposal should include how her support can impact the campaign, "Hopeful Horizons," and request a gift of \$25,000, that's payable over 5 years.

USE CASE | INTERMEDIATE Major Gift Proposal

Proposal: Expanding Hopeful Horizons

We are thrilled to introduce you to our comprehensive fundraising campaign, "Hopeful Horizons." This initiative is designed to raise critical funds to support the expansion of Hope for Health's reach, enabling us to open more counseling offices and provide vital mental health services to those in need. Your support can play a key role in making Hopeful Horizons a resounding success.

How Your Support Will Make a Difference:

More Counseling Offices: Your generous contribution of \$25,000, payable over five years, will directly contribute to the opening of additional counseling offices. This expansion is essential in addressing the growing demand for mental health services, ensuring that individuals in underserved communities have access to the support they need.

Increased Staff and Volunteer Training: With your support, we can hire additional staff to enhance our counseling services and develop comprehensive volunteer training programs. This will not only strengthen our existing programs but also enable us to extend our reach to more individuals.

Impact on Stigma Reduction: By expanding our presence and services, we will continue to make strides in reducing the stigma associated with mental health. Your contribution will empower us to engage in community education campaigns, fostering understanding and empathy for those living with mental illness.

USE CASE | INTERMEDIATE Major Gift Proposal

Request for Support:

We invite you to consider a meaningful gift of \$25,000, payable over five years, to support the Hopeful Horizons campaign. This commitment will play a crucial role in creating a lasting impact on mental health in our communities, allowing us to reach more individuals, reduce stigma, and provide support where it is needed most.

Next Steps:

We value your thoughtful consideration and would be honored to discuss this opportunity with you further. I propose scheduling a brief call at your convenience to address any questions you may have and explore how your support can contribute to the success of Hopeful Horizons.

Your commitment to mental health is deeply appreciated, and we believe that together, we can create a future where everyone has the tools and resources to thrive mentally.

Predictive Modeling & Advanced Segmentation

Predictive modeling is a powerful tool that leverages historical donor data to forecast future giving behavior. It involves a detailed examination of past data to identify patterns and trends, which can then help pinpoint potential donors, predict future giving, and enable a more personalized and effective outreach.

Advanced segmentation involves breaking down your donor base into specific categories based on various factors such as giving history, interests, demographic information, and even behavioral tendencies. This kind of detailed segmentation allows organizations to tailor their messaging and outreach in ways that resonate with each unique donor segment, thereby ensuring that the right message reaches the right donor at the right time.

USE CASE | ADVANCED

GPTs – Custom Models Trained On Your Data

Use GPTs to create customized versions of ChatGPT fine-tuned to your specific needs and data.

Use Cases:

- Social media manager
- Grant writer
- Case for Support generator



Al Nonprofit Advisor Advises nonprofits of practical applications of Al in fundraising



USE CASE | ADVANCED

Integrations & Automations

When this happens...

automatically do this...

zapier

When you trigger this Zap from the Zapier Chrome extension, by default it will include the website's title, URL, timestamp, and wh...

Trigger ② Instant



Create article summaries with OpenAl from the Zapier Chrome extension Zapier Chrome extension + Web Parser by Zapier + OpenAl (GPT-3, DALL-E, Whisper)



Try it

Details

Parse Webpage

New Push

Parses the given webpage.

Action O Write

then do this...



Send Prompt Sends a prompt to OpenAl and generate a completion.

Action **3** Write

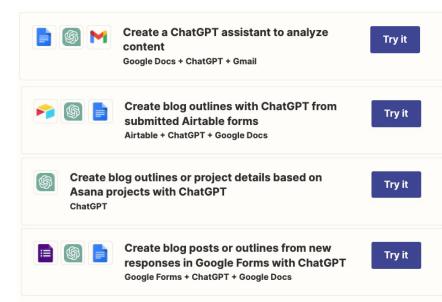
then do this!



Reply to Chrome

After triggering a Zap via the Chrome extension, you can return the results and display them right in the extension.

Other possibilities...



Action **O** Write

USE CASE | ADVANCED

Integrations & Automations

Make.com Example: Transcribe a meeting recording, summarize the transcript, and send me an email with the summary and action items.



Organizational Policies & Ethics

Limitations & Risks

Limitations

Hallucinations

Biases

Output monotony (repetitive or formulaic content)

Downtime

Changes to the LLM

Risks

Prompt injections

Malicious code hidden in websites

API key exposure

Compliance with GDPR and/or CCPA

Over-reliance on technology

ORGANIZATIONAL POLICIES Policies to Consider

Data privacy and protection: Ensure compliance w/ GDPR and CCPA; determine which data elements are essential for AI processing and which should remain confidential

Output review and oversight: Setting up peer-review systems where multiple team members check Al-generated content for accuracy and appropriateness

Training and competency: Staff should understand not just how to use AI, but also the limitations of AI, to prevent overreliance on technology

Security: Implement strong access controls, encryption, and monitoring systems to prevent breaches that could expose sensitive donor information

Transparency: How to communicate the use of AI in your operations

PRIVACY, SECURITY, & ETHICS Ethical Areas

AI Is a Tool: Not a replacement for human judgment and relationship management

Intentionality: Are you using AI to improve donor stewardship...or offload it?

Authenticity: Al is not cheating – getting it into your voice, providing context, understanding the motivations of your donors...*that is the work*

Job Security: AI is not going to replace fundraisers; when used correctly, it is only going to make us more efficient and effective

Wrapping Up

KEY TAKEAWAYS

ROI

- AI is still new and unproven technology, especially in the nonprofit space
- AI can enhance efficiency and improve results for fundraisers
- More compelling appeals, cases for support, grant proposals, etc.

KEY TAKEAWAYS

Getting Started

- Start with ChatGPT, Claude, and/or Bard, all of which have free and low-cost options
- Focus on prompt engineering to understand the mechanics of how to work with AI
- Provide sufficient context in your prompts
- Review all AI output before use

KEY TAKEAWAYS

Leveling Up

- Utilize automation software like Zapier or Make.com to extend the functionality of AI tools
- Add custom instructions to ChatGPT to fine-tune responses
- Explore GPTs, chatbots trained on your organization's knowledge base and needs
- Work with experienced third-parties like Graham-Pelton to deploy advanced donor identification strategies across your organization

More Info Resources

From Graham-Pelton

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- Predictive Modeling for Annual Giving: Four Critical Questions to Ask
- <u>ChatGPT Prompt Engineering: A Guide for Nonprofit Fundraisers</u>
- Using Automation to Boost Productivity & Delight Your Donors

From Other Sources – Technical

- <u>Prompt Engineering</u> (OpenAI)
- A jargon-free explanation of how AI large language models work (Ars Technica)
- <u>Claude is hallucinating</u> (Claude documentation)
- What are AI hallucinations and how do you prevent them? (Zapier)
- How to automate ChatGPT (Zapier)

From Other Sources – Nonprofits & Philanthropy

- <u>How to Make the Most of Artificial Intelligence and Other Technologies: Advice</u> <u>From Experts (CoP)</u>
- Nonprofits Talk A.I., Personalization, and Privacy at Technology Conference (CoP)
- <u>Grant Pros, Our AI Ethical Concerns Are Overblown</u> (Philip Deng)
- <u>ChatGPT Poses Ethical Quandaries for Nonprofits. Here's How to Confront</u> <u>Them.</u> (CoP)
- <u>It's Time for Philanthropy to Get Involved Driving Equity in AI (</u>Center for Effective Philanthropy)





Thank You!

About Graham-Pelton

Graham-Pelton is the fundraising consulting firm chosen by leading nonprofit organizations worldwide.

grahampelton.com

