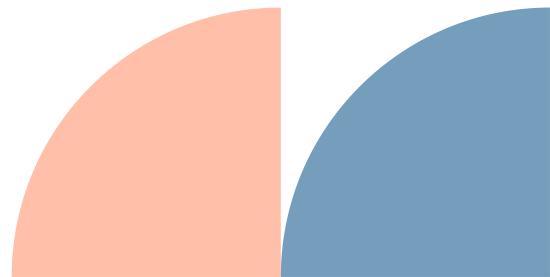


Unlocking fundraising potential and donor engagement with AI



Agenda

- 01 Intros
- 02 How to think about AI in 2025
- 03 Effective AI tools for donor communications
- 04 Five AI strategies for donor engagement



Introductions



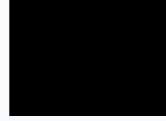
Intros

FreeWill Co-CEOs: Jenny Xia Spradling & Patrick Schmitt



AS SEEN IN

FreeWill is the **number one**
estate planning + planned
giving solution in the US, trusted
by 1,900+ leading nonprofits.



TOWN&COUNTRY

GOOD
HOUSEKEEPING

THE
WALL STREET
JOURNAL

Forbes

AARP®

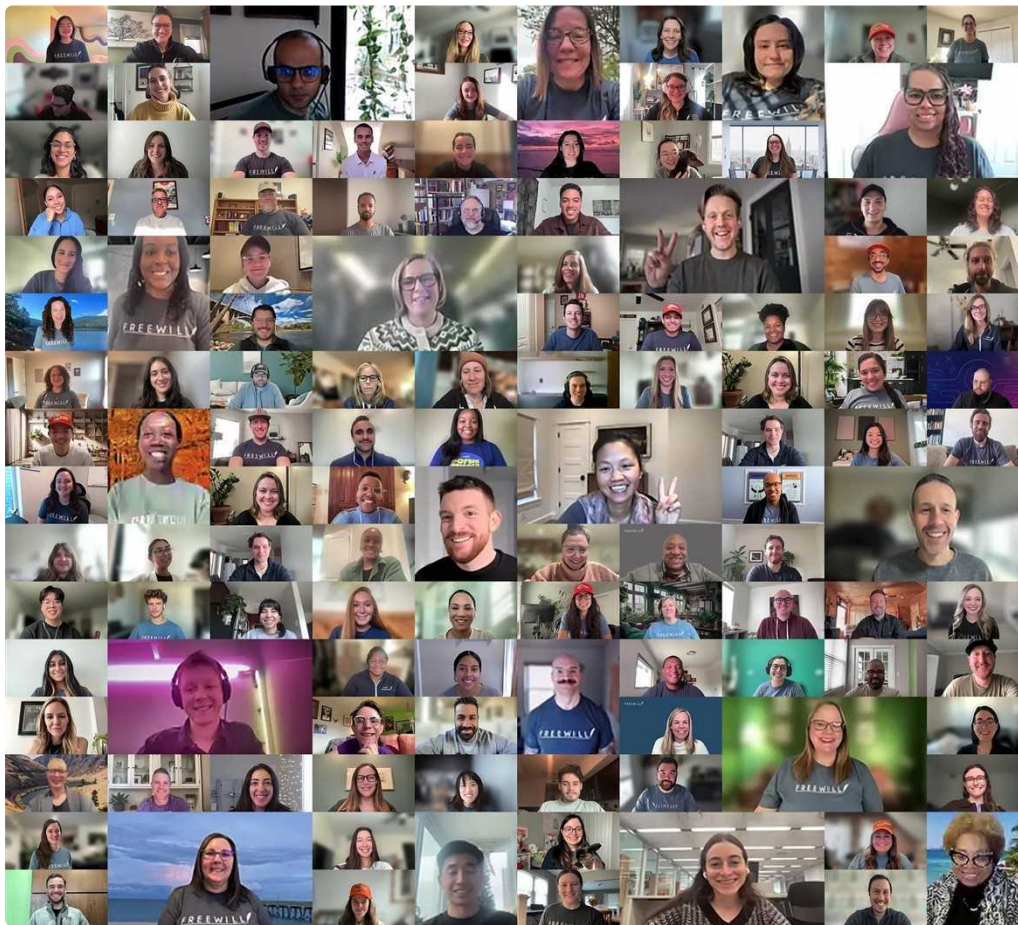


GREENPEACE



The FreeWill team

- **\$11.7B+** raised for nonprofits to date
- **1900+** nonprofit partners
- **Over four centuries** of combined fundraising experience and expertise



How to think about AI in 2025



AI is already becoming mainstream

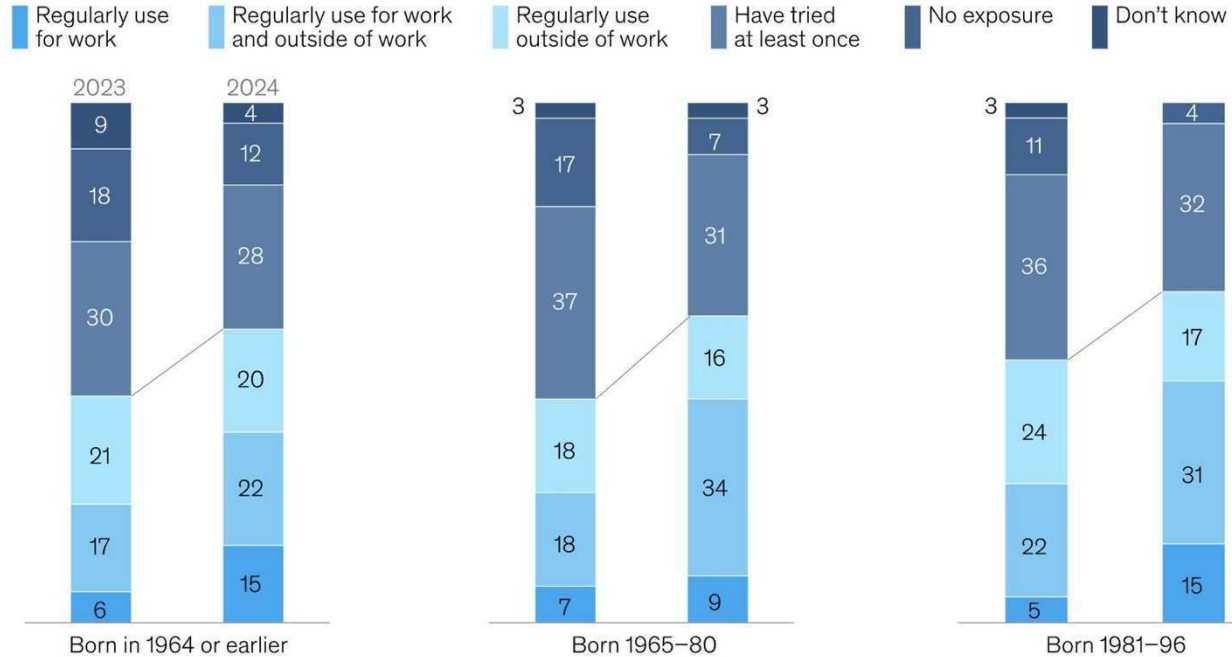
- **2023:** AI was the “shiny new toy”
- **2024:** We advised nonprofits that the most efficient fundraising teams would be incorporating it into their day-to-day
 - 30% of nonprofits believed AI boosted their revenue or fundraising in 2024
- **2025:** Nearly 7 out of 10 fundraisers are leaning on AI

Source: [Twilio](#)



Personal experience with generative AI tools, 2023–24, by age,¹ % of respondents

Total	By job title	By age	By industry	By location
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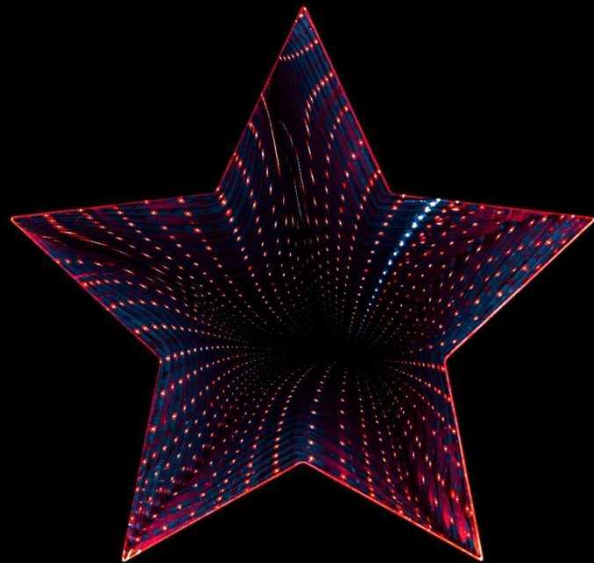
Source: [McKinsey](#)



AI outshines human experts for certain purposes

- A study released in September 2024 explored if AI tools were able to come up with “exciting” research ideas compared to human experts
- Researchers compared ideas from 49 human experts across 36 institutions with ideas generated by an AI model

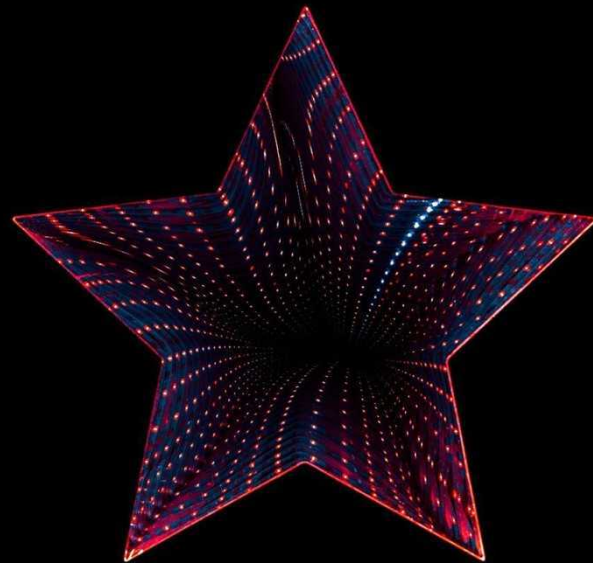
Source: [Stanford University](#)



AI outshines human experts for certain purposes

- All ideas were anonymized and standardized for consistency, then evaluated by a group of human experts in a blind review process
- **Ideas generated by AI were rated significantly higher in terms of novelty and excitement compared to human-expert-generated ideas**

Source: [Stanford University](#)



How do we explain AI's popularity?

- **Nonprofits are adopting AI faster than the private sector**
- 58% of nonprofits reported using AI, compared to 47% of B2C businesses
- There's a reason why nonprofits, and fundraisers especially, are embracing Artificial Intelligence at such a high rate



How do we explain AI's popularity?

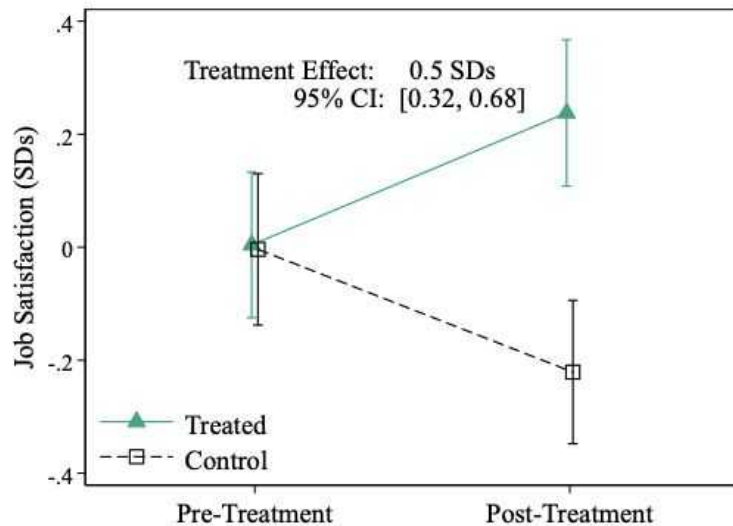
- Our work is a perfect use case for leveraging AI: most of what we do is communication, much of it written
- MIT research shows that using AI increases **productivity, quality of work** AND **happiness** in work
- AI helps us create better quality content, faster, and enjoy our jobs more



How do we explain AI's popularity?

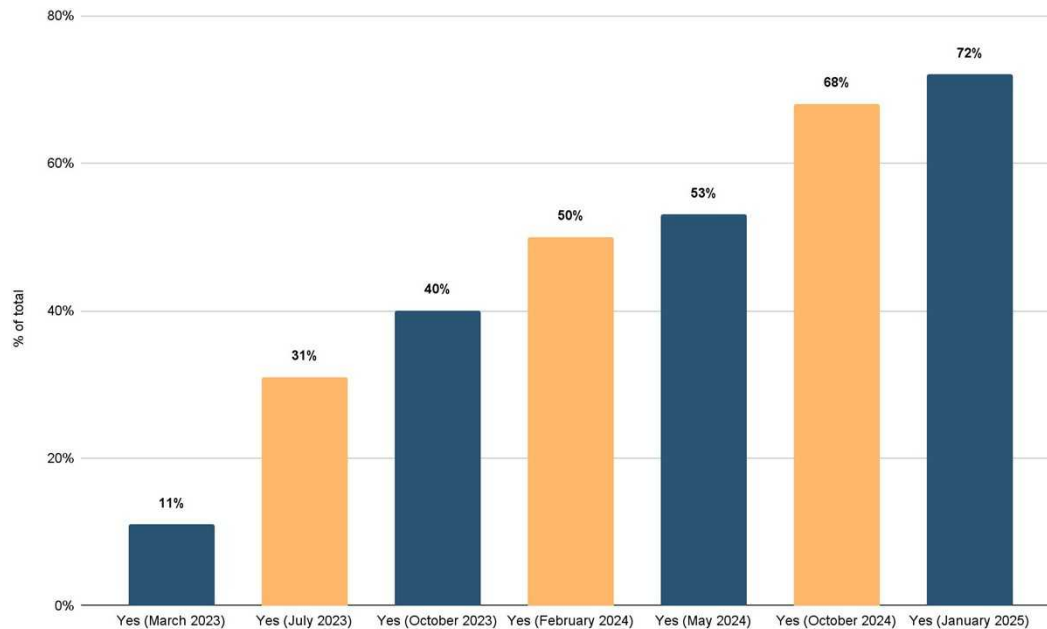
Research from MIT shows AI use increases both productivity *and* happiness on writing-based work

(a) Job Satisfaction



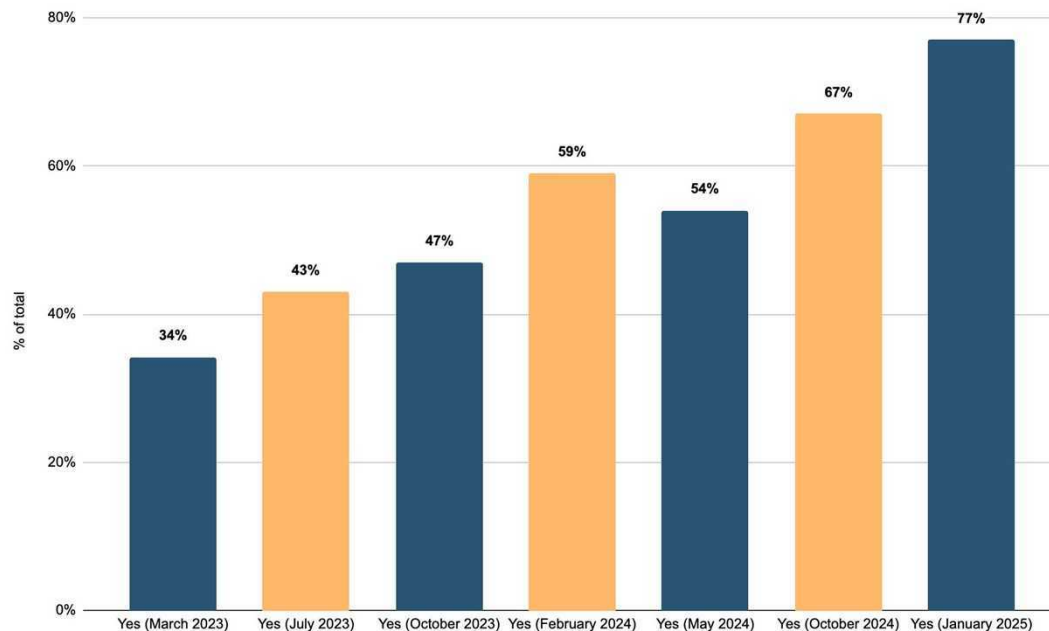
Do you already use some form of AI in your work?

Source: FreeWill survey data



Have you ever used an AI chatbot (e.g. ChatGPT) in your personal life?

Source: FreeWill survey data



AI increases worker productivity *and* happiness

- According to HP's 2024 Work Relationship Index:
- 73% of workers who use AI feel that it makes their jobs easier
- 6 in 10 said that AI plays a key role in improving their work-life balance
- **Workers who use AI are 11-points happier with their relationship with work than their colleagues who don't**

Source: [HP](#)



Making sense of donor opinion

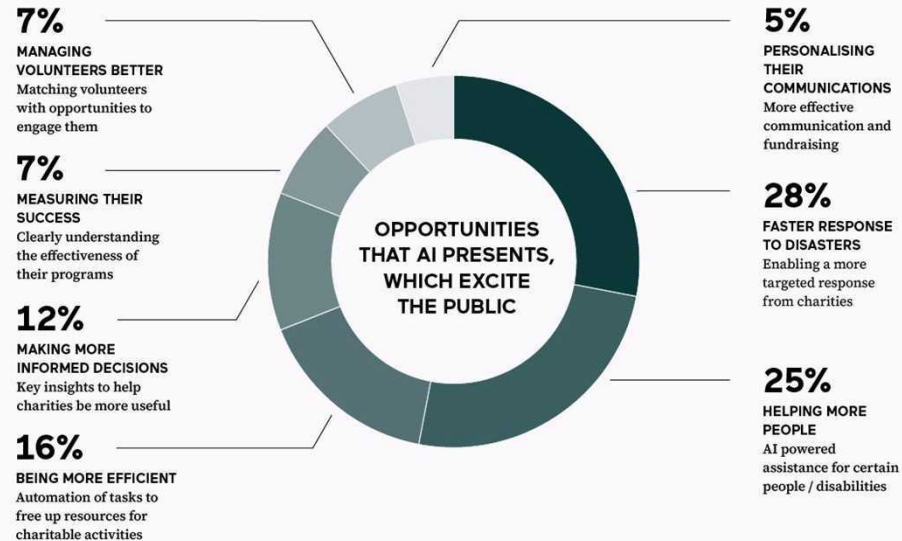
- A 2024 study on “AI and Donor Perceptions” found that 80% of donors who gave over \$50k annually reported being "very familiar" with AI
- Donors who rated themselves as “very familiar” also reported a higher comfort level across various nonprofit applications
- A separate study out of the UK showed that 70% of donors say “a lot” or “some” effort should be made to make AI accessible to charities of different sizes

Source: [Cherian Koshy](#), [Charities Aid Foundation](#)



#1 FASTER DISASTER RESPONSE

#2 HELPING MORE PEOPLE



The most effective AI tools for donor communications



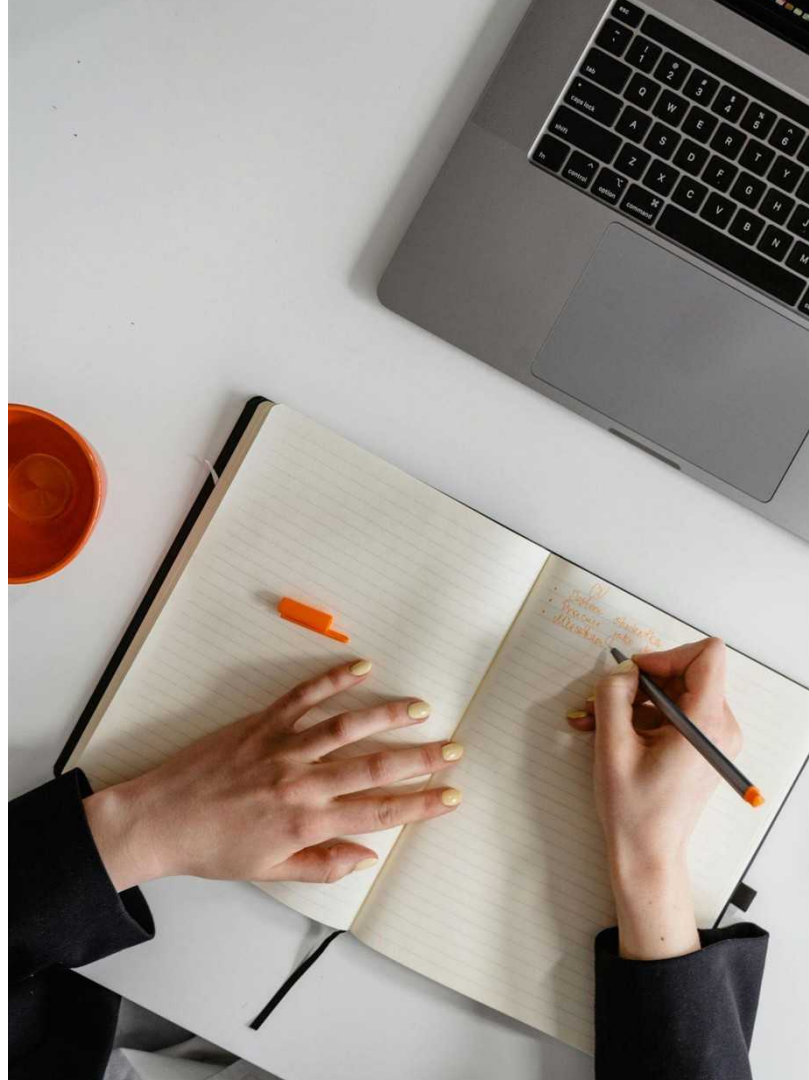
Beginner-friendly AI tools

- Claude: [Claude.ai](https://claude.ai)
- ChatGPT: [Chatgpt.com](https://chatgpt.com)
- Easy to use with instant message-style chat interfaces
- Great for brainstorming ideas, drafting content, and editing text
- Perfect for developing donor communications, email revisions, and administrative tasks
- Both online tools offer free and paid versions



Other tools to streamline your work

- **Fireflies.AI**: AI notetaker that can record, transcribe, and summarize your donor meetings
 - It works across various meeting platforms and transcribes with 90% accuracy
 - Free version available and paid subscriptions start at \$18/month per user



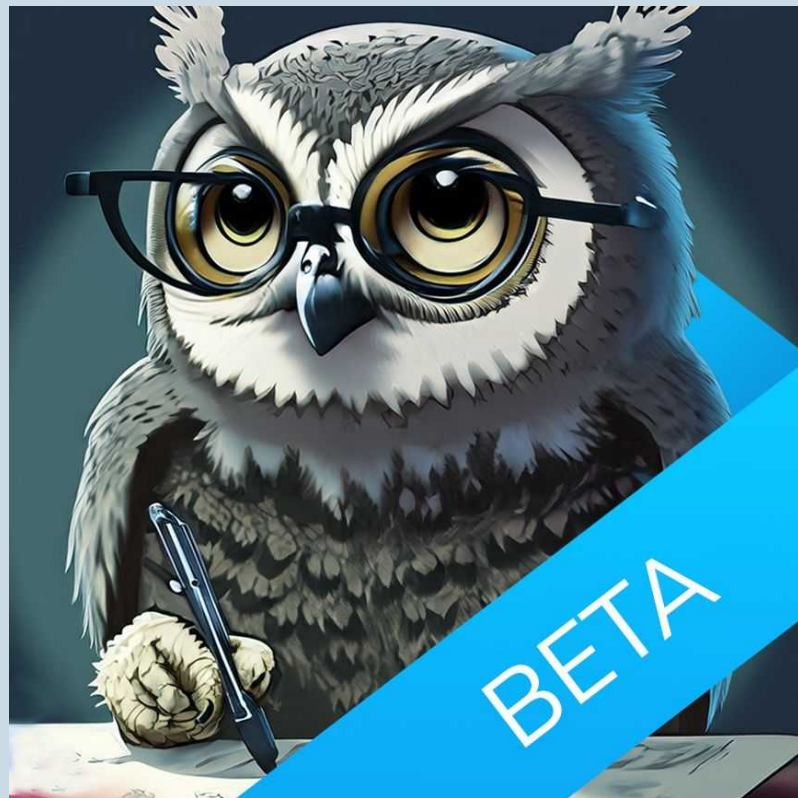
Other tools to streamline your work

- **Gamma**: Create presentations, webpages, and docs to present ideas with AI
 - Multiple languages available, offers different theme options, free and paid versions available
- **Google NotebookLM**: AI-powered research and writing assistant that can turn written text into a podcast



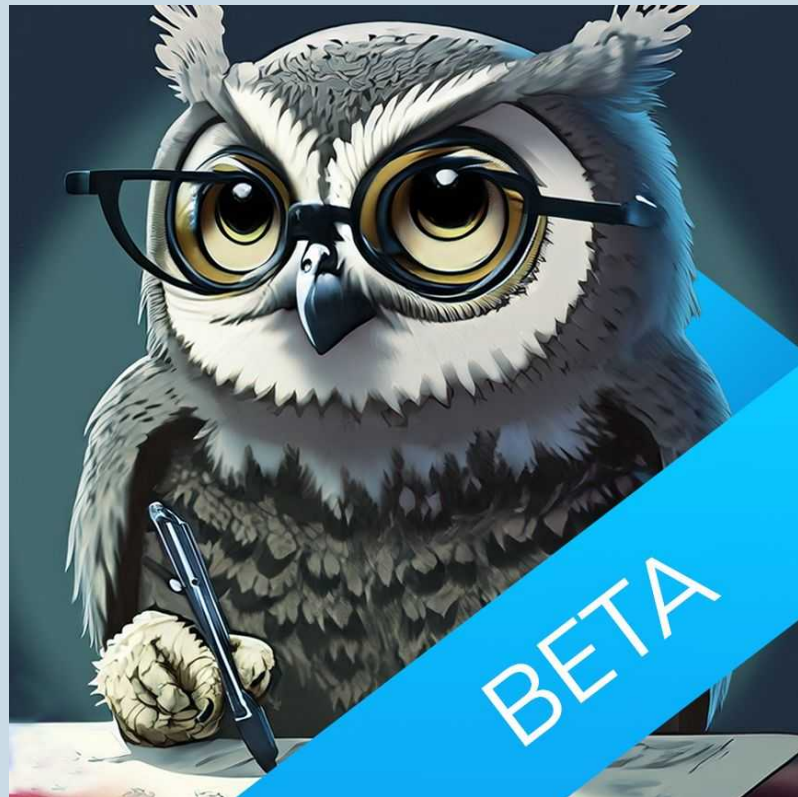
Willy (Built by FreeWill!)

- Willy is your nonprofit fundraising writing buddy, released in July 2023
- He generates the content that's most relevant to you, and has already been used by thousands of nonprofits
- Willy is 100% free
- It combines the best of AI with research-backed fundraising best practices to deliver best-in-class content within seconds



What can Willy do for you?

- Personalized fundraising emails
- Personalized direct mail copy
- Donor thank-you notes
- “Permanent giving guide” copy
- A compelling tax-smart giving message
- ...and much, much more!
- **You can give Willy a try (for free) at willy.freewill.com**



A sample internal policy document for AI use



A common request: “Internal AI use policy”

- Many organizations don't need a formal internal use policy to start using AI, as long as no proprietary or sensitive private data is put in AI
- You likely did not have a formal policy before you started using search engines, email, fax machines, etc.
- That said, some people still deeply desire one – so we created sample language for you



[Nonprofit Organization Name] AI Policy Document

Effective Date: [Insert Date]

1. Introduction

This AI Policy document outlines the principles and guidelines for the effective, ethical, secure, and responsible use of Artificial Intelligence (AI) technologies by [Nonprofit Organization Name].

We recognize that we have simultaneous obligations to 1) use technology to maximize our impact and effectiveness toward our mission, while 2) respecting the rights and dignity of all individuals.

2. Ethical Principles for AI Use

We commit to using AI in a way that is fair, transparent, and non-discriminatory. Our AI applications will prioritize the welfare and rights of individuals, ensuring that decisions are made with consideration for their potential impacts on society.

3. Data Privacy and Protection

We will collect and use data responsibly, ensuring informed consent is obtained. Data will be stored securely, with access strictly controlled. We will comply with all relevant data protection laws and ensure that personal information is treated with the utmost confidentiality.

We will not upload personal, private, or sensitive data to train external AI models without express consent from affected parties.



4. AI System Transparency

We will be open about our use of AI systems. When AI is used in decision-making, we will provide clear explanations of the processes involved, ensuring that these decisions can be understood by those affected.

We will take the following steps in AI produced content:

1. All text written with help of AI will be reviewed by a human before it is made public.
2. When this is not possible, it will clearly be labeled as “created by AI without review by a human”.
3. Any photorealistic image or video created primarily by AI is clearly labeled as such, and any person(s) in said images or videos have given permission for such usage.

5. Accountability and Governance

Responsibility for AI governance lies with [designated role/team]. This includes overseeing AI use and ensuring policy compliance

6. AI System Security (If AI models are being developed internally)

Robust security measures will protect our AI systems from unauthorized access and data breaches. Regular security assessments will be conducted to identify and mitigate potential risks.

7. Compliance with Laws and Regulations

Our use of AI will comply with all applicable local and international laws.



8. Employee Training and Awareness

Employees will be provided with training to understand AI technologies, ethical considerations, and best practices in AI use. This will foster a culture of responsible AI use within the organization.

9. Monitoring and Evaluation

We will continuously monitor the performance of our AI systems, assessing their impact on our operations and the communities we serve. Regular evaluations will inform improvements and adjustments to our AI strategies.

10. Review and Update of Policy

This policy will be reviewed at least bi-annually or as needed to reflect new developments in AI technology and changes in regulatory requirements. The process for updates will be transparent and inclusive.

11. Contact and Reporting

For inquiries or to report a concern related to our AI use, please contact [insert contact details]. We encourage open communication to ensure responsible use of AI in our organization.



Be transparent with donors about AI usage

- 86% of donors consider transparency in AI usage “very” or “somewhat” important
- If you choose to inform supporters that your team is using AI, you can share:

“Please note: [ORG NAME] sometimes uses Artificial Intelligence alongside human expertise in content generation to be maximally efficient and make the most impact at the lowest cost.”



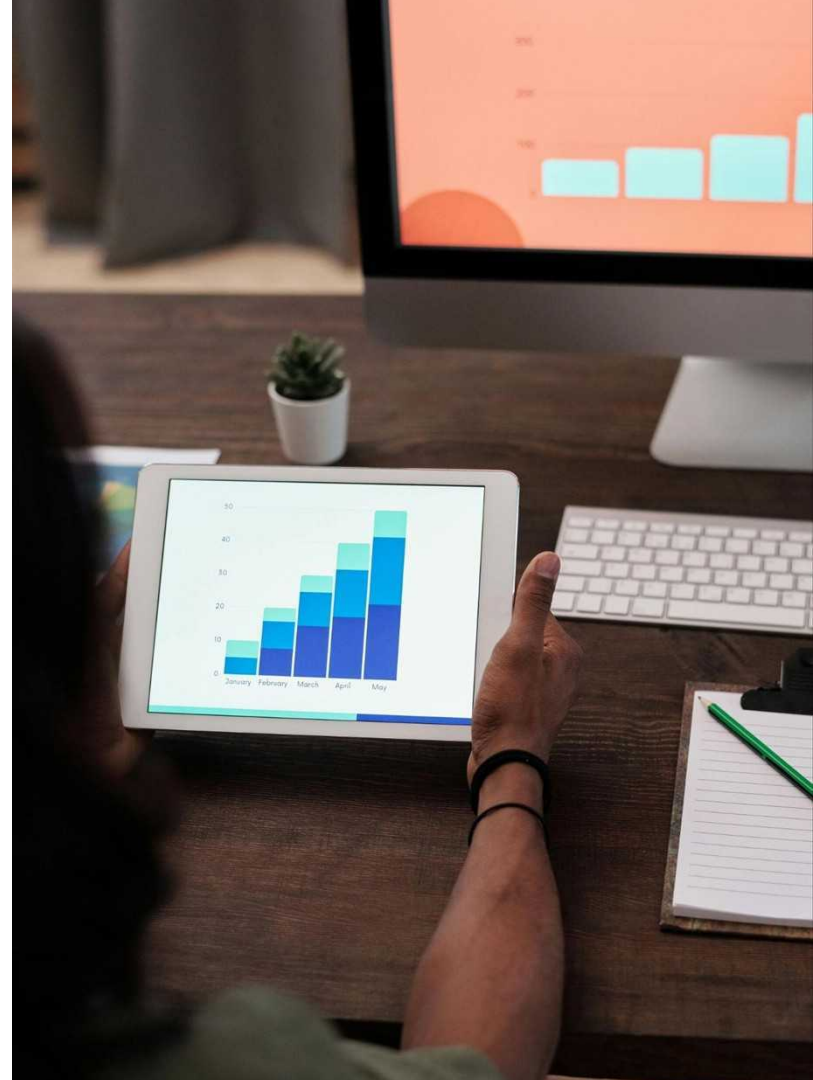
5 AI strategies to maximize donor engagement



Strategy #1:

Better donor surveys

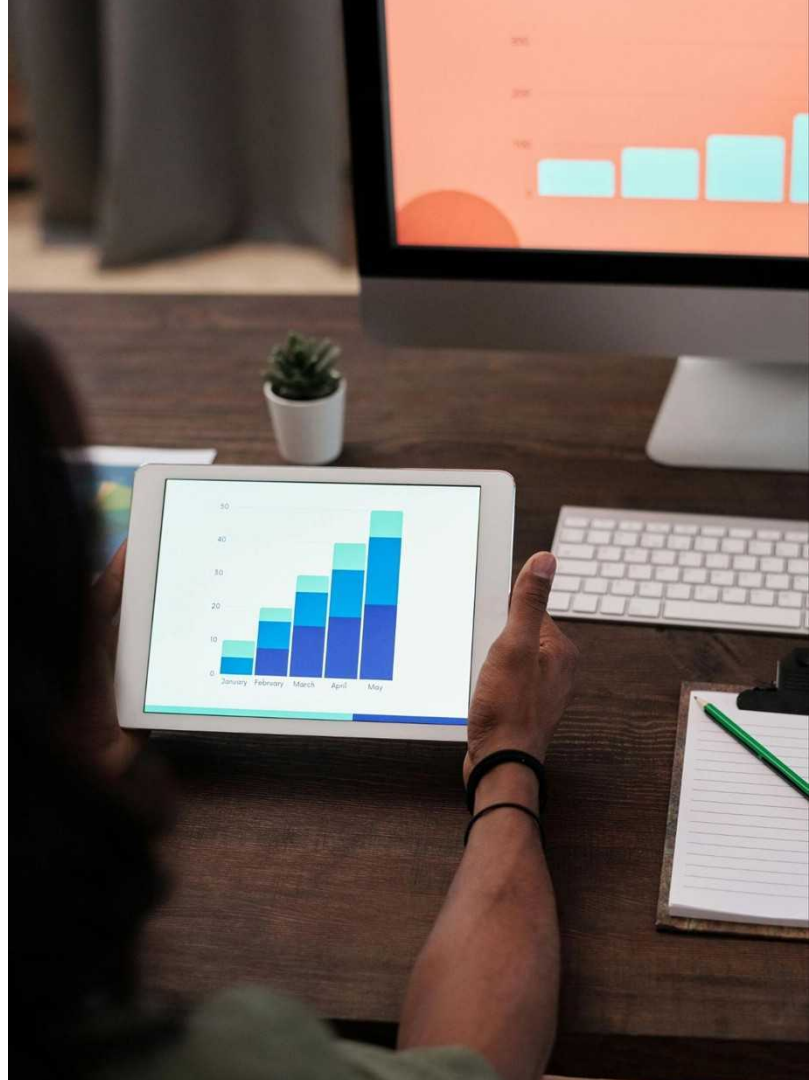
- AI can help you conduct qualitative analysis of donors surveys and create custom follow-up in a fraction of the time
- Upload donor survey responses into ChatGPT or Claude to begin analysis (anonymized, if necessary)



Strategy #1:

Better donor surveys

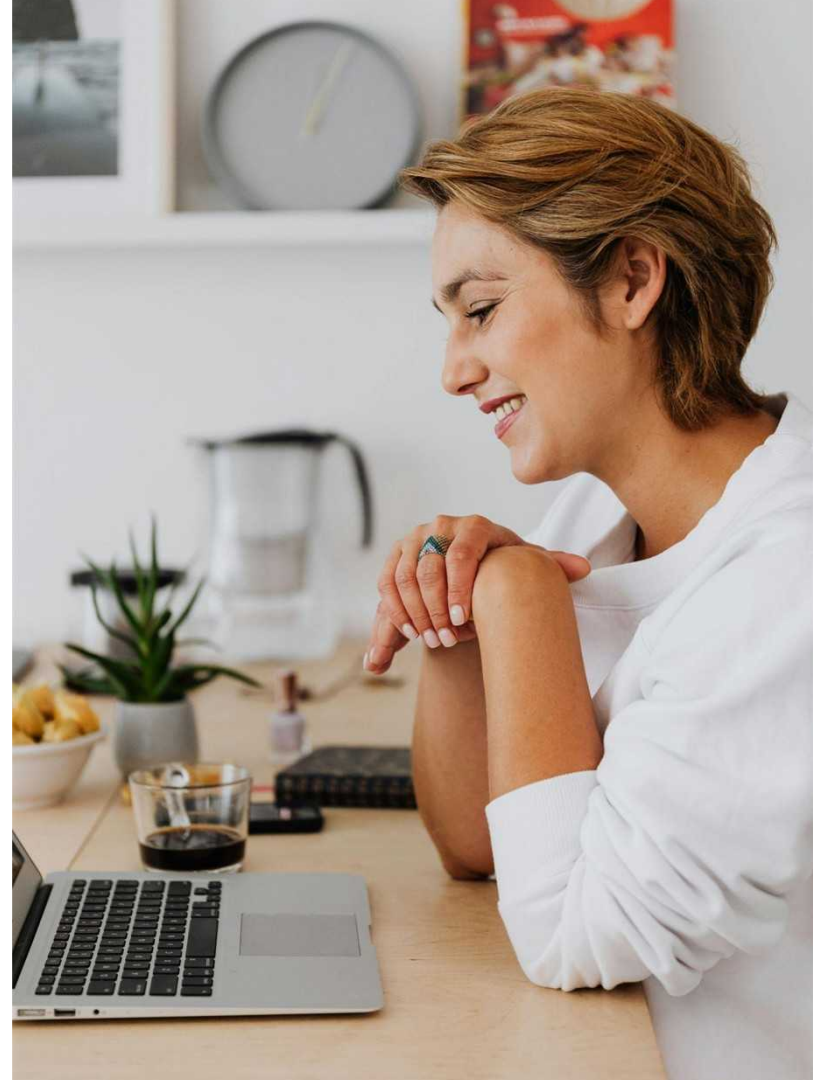
- Write a prompt asking AI tool (ChatGPT, Claude) to identify key themes or trends
- Also ask to highlight particularly negative responses and pull the most positive quotes
- Then, use the survey responses to write custom follow-up to anyone expressing interest in getting involved
- Some ideas: Planned giving, volunteering, learning about tax-smart gift options



Strategy #2:

Bring your institution to life with AI characters

- Use OpenAI's GPT to design a virtual character that helps people form a memorable connection to your mission
- Start small by brainstorming a persona that embodies your organization
- Older institutions might think about bringing a founder's or famous alum's legacy to life
- Training AI on their writings, research, or their experiences as a student



Strategy #3:

In-house gift tutoring

- Students with **access to an AI tutor achieved more than twice the learning gains** compared to those in an active learning classroom, according to a Harvard study
- The students also achieved these gains in half the time

Source: [The 74](#), [Stanford University](#)



Strategy #3:

In-house gift tutoring

- AI tutors not only improve student outcomes but also enhance human tutor effectiveness
- A Stanford study found that students working with AI-assisted tutors achieved mastery more often than those without AI assistance

Source: [The 74](#), [Stanford University](#)



Strategy #3:

In-house gift tutoring

- Make non-cash gift asks easier for everyone in little to no time
- Build an AI tutor tailored to your team using a free tool like ChatGPT
- This can be put to work training gift officers, volunteers, Board Members and anyone on your team communicating with donors
- The tutor should focus on non-cash gifts like stock, QCDs, DAFs, and crypto



Strategy #3:

In-house gift tutoring

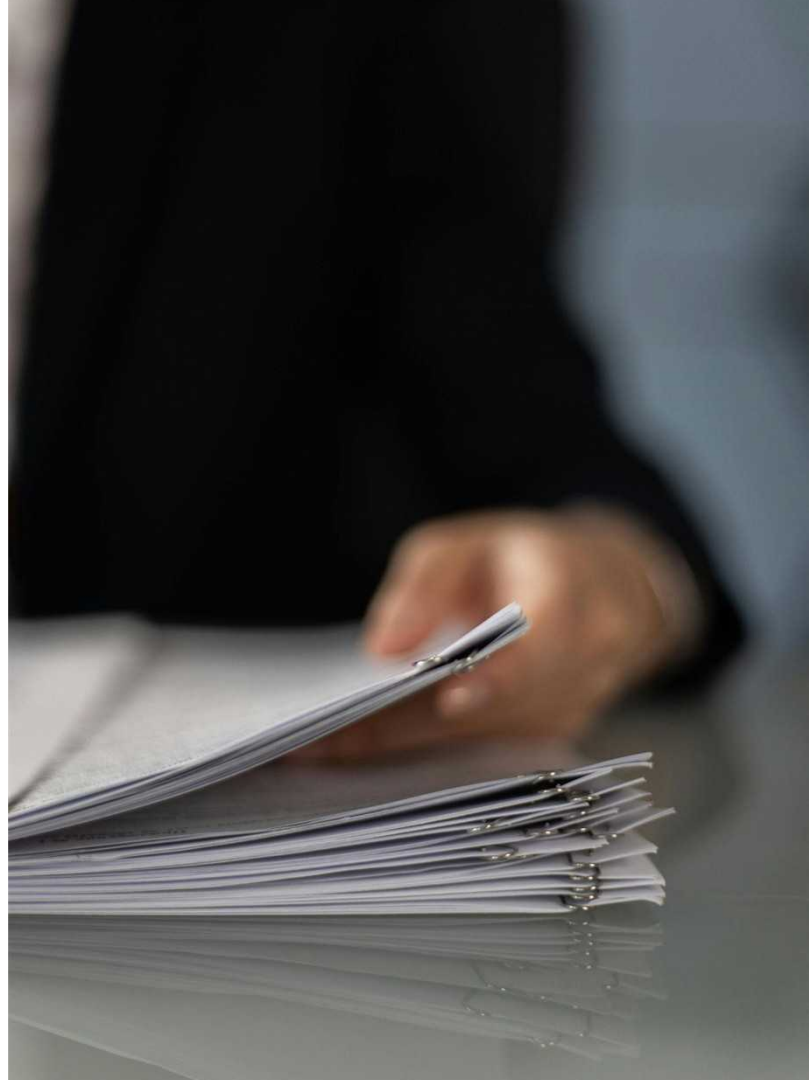
- This can serve multiple purposes:
 - Provides your team with a safe space to practice conversations (and get really good at asking for these gifts)
 - Speeds up onboarding or training, and is accessible whenever needed



Strategy #4:

Personalized annual reports

- Leverage your annual report to strengthen donor relationships
- Generate custom summaries for major donors that highlight their impact
- Tailor these summaries based on previous giving history and past correspondence
- Include personalized touches to show appreciation and reinforce their connection to your mission



What can I help with?



2024-annual-report.pdf
PDF



Please make an executive summary for john and mary smith, who have been donors for the past 12 years and recently gave a \$35,000 stock gift to support our efforts to stop pollution in the bay



Dear John and Mary,

Thank You for Over 12 Years of Generosity

Your steadfast support of our mission to protect and restore the Chesapeake Bay has been truly transformative. Most recently, your generous \$35,000 stock gift has played a pivotal role in advancing our efforts to stop pollution in the Bay, and we are excited to share the impact of your incredible contributions.

The Difference You've Made:

- **Tackling Pollution (p. 10):**

Your gift directly supports our efforts to address industrial pollution, such as improper handling of industrial sludge on Maryland's Eastern Shore. With your help, we've secured bipartisan legislation to regulate these harmful practices and ensure accountability.

- **Restoring Natural Habitats (p. 8):**

Thanks to your generosity, we've made significant progress in expanding living shorelines and restoring oyster reefs. These initiatives provide critical habitats, protect against erosion, and bolster resilience to rising sea levels, creating a healthier Bay ecosystem.

- **Advocating for a Sustainable Future (p. 12):**

Your support strengthens our advocacy work, such as championing the Whole Watershed Act. This innovative legislation targets collaborative restoration efforts in five key watersheds, ensuring holistic improvements to water quality and habitat health.



Looking Ahead:

Your commitment is creating lasting change. Together, we are addressing the challenges of climate change, combating stormwater runoff, and securing vital protections for the Bay's ecosystems and communities.

Learn More About the Impact of Your Gift:

To see the results of your support in greater detail, we encourage you to explore these sections of our 2024 Annual Report:

1. **Stopping Pollution** (p. 10)
2. **Living Shorelines** (p. 8)
3. **Advocacy Highlights** (p. 12)

With Gratitude,

Your partnership inspires us every day. Your generosity is at the heart of the progress we've made and the future we're building. Together, we are stopping pollution and restoring hope for the next generation.

Warm regards,

[Your Name]

[Your Title]

[Organization Name]



Strategy #5:

Extreme stewardship

- Ask your donors why they gave to your organization and what parts of your mission mean the most to them
- Zero in on what your donors care about most then use AI to tailor your messaging
- Start by asking donors something like "What inspired you to give?"
- Use their answers to craft appeals and outreach that feel specific and meaningful to each donor
- You can easily get started with a tool like Willy, which is already trained in fundraising best practices to make personalization effortless



Strategy #5:

Extreme stewardship

- 90% of donors say the “thank you” email is the single most important communication they receive from a nonprofit
- Donors prefer personalization, which AI can help you do at scale – here are some ideas:
 - Mention their giving history to demonstrate the value of their gift
 - Remind them of a past event or interaction they were part of, reinforcing their connection to your org
 - Share a brief testimonial from someone who directly benefited from their donation AND lightly suggest planned giving



Thank you!

Jenny Xia Spradling
Co-Founder, Co-CEO

E. jenny@freewill.com

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