

Smart Fundraising for Nonprofits

USING AI TO UNDERSTAND, ENGAGE, AND INSPIRE DONORS

AARON PROIETTI, FOUNDER OF TODAY'S INNOVATOR

About SCORE

As a resource partner of the SBA, we help small businesses by:



Providing free
business advice
and mentoring



Offering low or
no-cost business
training



Sharing free business
templates and
resources

Request a SCORE mentor at www.score.org/find-mentor

Your Presenter



Aaron Proietti is the author of the book *Today's Innovator*. He is an innovation expert with years of experience innovating in complex organizations. Aaron views innovation not as an activity, but as a competency that must be developed, led, and nurtured within both individuals and organizations.

A former Chief Innovation Officer at the global insurer Transamerica, Aaron is also an expert in technology trends and their impacts on people and organizations. Today, he is a speaker on topics such as innovation, disruption, and changemaking. Through his company “*Today's Innovator*,” his writing, and his speaking, Aaron’s mission is to unlock the potential of people to drive meaningful change.

Social Innovation



SOCIAL INNOVATION is the process of developing and implementing creative solutions to address social challenges.

It involves finding new approaches, programs, products, or organizational models that positively impact individuals and communities, contributing to broader societal change.

Usage of Generative AI tools is social innovation that has the potential to completely reinvent how you work and impact our community.

Agenda

- Using Generative AI
- Understanding Your Donors
- Crafting Compelling Messaging
- Designing Bold Strategies
- Your Donors' Experience

Using Generative AI (Gen AI)

Treat tools like ChatGPT, Google Gemini, Microsoft Copilot, Claude, and Meta.AI as your creative and strategic partner



What Gen AI Is

- A writing partner, data analyst, idea generator, and editor—all in one
- It works by responding to your prompts, not by reading your mind
- No technical skills required—just clear, conversational language



Best Practices

- **Context is king:** Tell it who you are, what you need, and why
- **Use real examples:** The more detail you give, the better it gets
- **Revise as you go:** Ask it to tweak tone, focus, format, or length
- **Build step by step:** Break complex tasks into smaller prompts



Good to Know

- GenAI outputs are drafts—not truth. Always review and revise
- Never input private donor data or confidential information
- You can use free or paid versions (ChatGPT 4o, Google Gemini 2.5 Flash, and Claude Sonnet 4 are great choices.)

Our Fictitious Nonprofit



Capital Grove Learning Alliance (CGLA)

Theme: Community-Based Education Access & Adult Skill-Building

Mission:

To expand educational access and career pathways for under-resourced adults and families in the Capital Region through place-based learning hubs, digital equity programs, and nonprofit collaboration.

Values:

Learning Without Barriers ♦ Dignity Through Opportunity ♦ Community-Rooted Solutions ♦ Digital Access is a Right ♦ Growth at Any Age

Current Initiatives:

- **Learning Grove Centers** in underutilized public spaces (libraries, rec centers, churches)
- **Digital Skills for Life:** basic tech, resume building, job search coaching
- **Bilingual Family Literacy Nights** in partnership with elementary schools
- **Shared Learning Calendar** across 15+ regional nonprofits
- **Device Loaner Program** for adults enrolled in skill-building workshops

Location: Serving Prince George's, Frederick, and Montgomery Counties (MD), plus Ward 7 and Ward 8 in Washington, DC

Serving:

Under-resourced adults aged 25–55, particularly single parents, older immigrants, and returning citizens seeking new career paths

Understanding Your Donors

DEMOGRAPHICS, PSYCHOGRAPHICS, AND MOTIVATIONS



Demographics

Facts about a person

(age, income, or where they live)



Psychographics

What a person cares about

(values, lifestyle, and interests)



Motivations

Why someone gives

(wanting to make a difference, give back, or feel connected)



Demographics

I have a dataset of donor transactions. Each row includes donor ID, donation date, donation amount, age (when available), zip code, occupation,, etc.. Some donors appear more than once.

Please help me summarize the demographics of our donor base. Specifically:

- What is the average donor age (among those with known age)?
- What are the 3 most common occupations?
- How many unique zip codes are represented, and which are the top 5?
- How many donors have made more than one gift?

Finally, tell me 2-3 things I can infer about our donor demographics and what they might mean for how we communicate or fundraise.

- Facts about a person—like their age, income, or where they live.
- AI helps us sort and summarize donor data—like age, location, and giving history—so we can see patterns at a glance.

Donation Date	Donation Amount	Age	Zip Code	Occupation
2022-07-04	5236.21	37.0		
2022-07-31	51.71		87012	
2022-08-12	57.34	32.0	32912	
2022-09-09	5807.22		79983	
2022-09-12	32.1			
2022-09-21	196.35	40.0		Catering manager
2022-09-21	80.73		7073	Television/film/video producer
2022-10-13	184.31			Barrister's clerk
2022-11-25	3592.94	43.0	64640	
2022-11-26	71.2	40.0		
2022-12-20	86.2			Call center manager
2023-01-02	11.6			
2023-01-07	136.12			
2023-01-14	31.25	35.0	84610	
2023-02-02	15.42	72.0		
2023-02-09	15.31	73.0		
2023-02-10	33.58	71.0	56834	Conference centre manager
2023-02-16	31.25			
2023-02-19	117.2	40.0	58834	
2023-02-28	2.8		96693	Pharmacist, hospital
2023-03-05	4.69		61090	Museum education officer
2023-03-15	31.79	70.0	86857	
2023-03-29	15.42	72.0		
2023-04-18	441.39	73.0		
2023-05-20	239.04		84610	
2023-06-06	2.53		18790	
2023-06-21	254.07	54.0		
2023-06-21	10.78	47.0		Museum/gallery conservator
2023-06-28	21.26	42.0	50487	Teacher, music
2023-07-15	251.81		35471	Designer, jewellery
2023-07-18	381.6			

ALWAYS REMOVE PII!!!



• Psychographics

We are a nonprofit focused on [insert your cause or mission] in [insert your region or community].

Based on this, create [number] realistic donor personas we might attract or want to engage.

For each persona, include:

- Name, age range, occupation, and giving capacity*
- What they care about (values, beliefs, personal connection to our cause)*
- How they prefer to be communicated with*
- Where we might reach them (online or offline)*

- What a person cares about, like their values, lifestyle, and interests.
- AI can simulate what your donors (***and prospective donors!***) likely care about, generating values, interests, and personality traits based on just a few cues.



• Motivations

Based on the donor personas previously generated, identify the key emotional drivers that might motivate each one to give to our cause.

For each persona, please provide:

- 2-3 likely emotional motivations*
- A message that would resonate with their values and feelings*
- A campaign idea or engagement moment that aligns with those motivations*

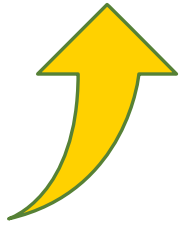
Keep the tone aligned with nonprofit fundraising—human, clear, and values-driven.

- Explains **why** someone gives: wanting to make a difference, give back, or feel connected, etc.
- Given a donor description, AI can fill in the likely emotional reasons behind their giving.

Crafting Compelling Messaging

MISSION, STORY, AND CALL TO ACTION

2 Crafting Compelling Messaging



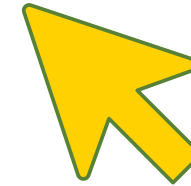
Mission

Why does this matter?



Story

Why now?



Call to Action

What's next?

2 Crafting Compelling Messaging



Mission

We are a nonprofit focused on:
[insert your mission statement OR paste a link to your mission page]

Based on the donor personas above and their motivations, help us express our mission in a way that feels personally meaningful to each one. Keep the core purpose intact, but adapt the language so it connects with the person behind the gift.

For each version:

- Keep it under **[number]** words
- Use a tone that aligns with their values
- Emphasize why this mission matters to them

- Why this matters
- AI can help clarify and distill your mission into clear, audience-friendly language that resonates without sounding like a brochure.

2 Crafting Compelling Messaging



Story

Based on the donor personas and their motivations, identify one story theme or storyline that would resonate most with each persona.

For each donor persona, describe:

- The type of story that would connect emotionally*
- The kind of character or situation that should be featured*
- Why this story arc would matter to this donor*

We're not asking you to write the full story—just help us know what kind of story to tell.

- Why now?
- AI can turn raw facts or program details into compelling human stories that connect emotionally with your donors.
- Alternative: insert your own existing impact story

2 Crafting Compelling Messaging



Call to Action (CTA)

Write a distinct call to action for each donor persona.

If the CTA isn't a direct donation ask, briefly describe the steps that would move them closer to giving.

Each CTA should feel personal and appropriate to their motivations and giving capacity.

Include a short line that ties their potential gift to something they care deeply about.

- Shows the donor what the first/next step will be
- AI can generate strong, clear calls to action tailored to different donor types, making it easier to move people from interest to impact.

Designing Bold Strategies

FOCUSED ON A GOAL, EMOTIONALLY RESONANT, DESIGNED TO
CREATE A RESPONSE



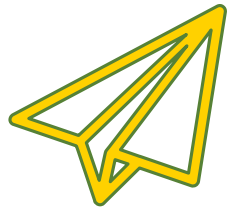
Focused on a Real Goal

Identify clear, achievable fundraising goals



Emotionally Resonant

Generate emotionally-aligned campaign themes or strategies tailored to the goals and donor motivations



Designed to Create a Response

Turn ideas into action



Focused on a Real Goal

We are a nonprofit focused on: [insert core mission or priority area]

Our current donor base includes:

- Key demographic traits (if known): [e.g., age, location, giving history]*
- Key psychographic insights (if known): [e.g., values, interests, motivations]*

We are also looking to reach new donors, such as: [insert 1-2 donor personas or high-level audience descriptions]

Based on these factors, suggest 2-3 focused fundraising campaign goals.

For each campaign goal, include:

- The intended donor segment (existing or prospective)*
- The specific fundraising objective*
- Why this goal is strategically important right now*
- One constraint or condition we should keep in mind*

- Identify clear, achievable fundraising goals.
- Without focus, everything else risks being scattershot or mismatched.



Emotionally Resonant

Based on our campaign goal of [insert focused fundraising goal], and our donor personas and their core , propose 1-2 emotionally resonant campaign themes or strategies per persona that could help achieve the goal.

For each theme or strategy, include:

- A short campaign concept title or tagline*
- The core emotional hook*
- A brief messaging approach*
- The type of story or donor experience this strategy would work well with*
- Why this campaign approach would resonate with the personas*

- Generate emotionally-aligned campaign themes or strategies tailored to the goals and donor motivations.
- Once you know what you want to achieve, you can craft messages and themes that connect deeply with those you're trying to reach.



Designed to Create a Response

For the following campaign concept(s): [insert top 1-2 emotionally resonant campaign themes]

Design a response strategy that turns emotional resonance into measurable engagement.

For each campaign concept, include:

- A clear call to action that fits the persona(s) and campaign tone*
- The response mechanism*
- A primary channel*
- A suggested timeline or sequencing of the engagement steps*
- One creative element or hook to make the experience memorable*
- A quick suggestion for how we might pilot or test this before a full launch*

- Turn ideas into specific campaign mechanics, engagement moments, or calls to action.
- You now have a relevant message and a purpose! This step makes it real and interactive.

Bring it all together! (“The Final Synthesis”)

Based on the work done across these prompts—focused goals, emotionally resonant campaign themes, and actionable response strategies—create a detailed summary of the top bold campaign concept.

For the selected campaign, provide:

- A campaign name or working title
- A one-sentence campaign description
- The fundraising goal and intended donor segments
- The emotional hook and messaging approach
- Key engagement moments and calls to action
- Recommended channels and response mechanisms
- Any risks or limitations to consider

Then provide:

- Design considerations: What tone, visuals, and storytelling styles should guide this campaign?
- High-level project plan: Outline major phases or milestones, and what roles or capabilities would be needed to launch this successfully.

Your Donors' Experience

FROM FIRST SPARK TO LIFELONG SUPPORT



From First Spark to Lifelong Support

Based on the donor persona(s) provided, create a donor experience journey map from initial awareness to donation and ongoing engagement.

For each stage in the journey, describe the following:

- What the donor is likely thinking, feeling, or doing at this stage
- Key pain points that might cause hesitation, confusion, or disengagement
- Moments that matter—interactions that can build trust or deepen connection
- Suggested strategies for addressing the pain points and enhancing the moments that matter

Keep your recommendations aligned with the persona's motivations and communication preferences.

Questions?

Helpful Links

- Find SCORE resources for small businesses at www.score.org/templates-resources
- Find more SCORE live and recorded workshops and courses at www.score.org/get-business-training
- Book an appointment with a SCORE mentor at www.score.org/find-mentor



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