

# Leading AI in Fundraising

A Governance-First Starter Guide for  
Nonprofit Leaders and Fundraising Teams

AI is already showing up across  
nonprofit work.

The leadership opportunity is not  
about how fast to adopt it.

It is how intentionally you lead it.

# EXECUTIVE SUMMARY

At The Curtis Group, we help nonprofit leaders navigate complexity, protect donor trust and strengthen fundraising programs to raise transformational dollars. AI is already part of the nonprofit landscape—but too often it is adopted quietly, unevenly or without clear leadership direction.

Nonprofit organizations are already encountering AI in donor communications, grant writing, prospect research, marketing and board materials. Staff are using AI to draft emails, summarize research, brainstorm content and prepare internal materials.

Many leaders are surprised to learn how frequently AI is already being used inside their organizations.

**You do not need to be an AI expert to lead  
well in this moment.**

**You need curiosity, clarity, and a  
commitment to protecting relationships.**

The real leadership question is not whether your organization should adopt AI. It is whether your organization will lead its use responsibly, so it strengthens human relationships.

At The Curtis Group, we work with nonprofit leaders who want to move thoughtfully. They are not looking for shortcuts. They want clarity, trust, and practical starting points.

**Responsible AI adoption starts with people, not platforms.**

# AI IS A LEADERSHIP CONVERSATION

Many nonprofit leaders assume AI adoption begins with software. In reality, it begins with culture and governance.

## Common Patterns

- AI appears informally and gradually in daily work
- AI is embedded in tools already
- Staff experiment quietly
- Leadership is unsure how to respond
- Nonprofits are curious and cautious

## Where AI is Already Showing Up

- Donor research and prospect profiles
- Email and appeal drafting
- Event invitations and stewardship messaging
- Grant writing and reporting
- Board and campaign materials

### The Curtis Group Donor Trust Filter

Before using AI:

1. Does this strengthen trust?
2. Does this deepen understanding?
3. Does this support, not replace, human interaction?
4. Would we feel comfortable explaining this to a donor?

In fundraising especially, this matters deeply. Donors give to people. Used well, AI can increase capacity and clarity. Used poorly, it can erode donor trust, the foundation of every relationship. **AI must strengthen that trust, not weaken it.**

# THE NONPROFIT AI ADOPTION CYCLE

This framework helps nonprofit leaders understand what is already happening inside their organizations. Most organizations are in multiple stages at once. Where is your organization?

## Shadow Use

AI is being used informally without leadership visibility or shared guidance. You may be here if staff are experimenting individually and leadership has not collectively discussed AI.

## Structured Pilots

Organizations test low-risk use cases with clear goals and review processes. You may be here when teams are intentionally piloting and sharing lessons learned.

## Curious Experimentation

Teams begin exploring small ways AI might support their work and early uses start to surface. You may recognize this stage when interest is growing but rules remain unclear.

## Strategic Integration

AI begins supporting workflows, planning and decision-making in consistent ways. This stage emerges when AI is included in training, planning or regular processes.

## Governance & Guardrails

Leadership begins setting expectations, boundaries and ownership for AI use. This stage often starts when organizations move from informal use to shared guidance.

## Measurement & Improvement

Organizations evaluate outcomes, refine practices and expand what works. AI becomes part of continuous learning and long-term strategy.

# If trust matters, governance comes first.

Governance reduces risk, builds staff confidence and signals to donors that your organization is leading responsibly.

It ensures that AI strengthens relationships rather than creating confusion or inconsistency.

# GOVERNANCE CHECKLIST

## Clear Guidelines



Do we have written policies?



Do we have guidelines about acceptable uses and approved tools?

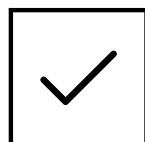


Do we have guidance on what should NOT be entered in AI tools?

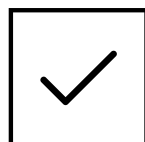


Do staff understand donor confidentiality expectations?

## Ownership & Accountability



Do staff know who owns AI coordination?



Do we require human review of outputs?



Have we discussed when AI use should be disclosed?



Do we have shared language to explain AI use if asked?

# THREE PRACTICAL STARTING POINTS

We're often asked, "What platform should we buy?" And our answer is usually: that's not the first question. The most important investment right now isn't software. It's people and skills.

01

## **Name an AI Champion**

Someone who is curious, thoughtful and willing to keep this conversation visible. This is a professional development role, not a technical one.

02

## **Automate One Step (With Review)**

Choose a bounded task where AI can assist, and then practice review, judgment and reflection. This is how teams learn to evaluate outputs, ask better questions and understand where AI helps and where it doesn't.

Examples of Low-Risk Starting Points

- Cleaning up meeting notes
- Creating a draft of impact or program report
- Drafting customizable thank you notes

03

## **Run Time-Bound AI Micro-Pilots**

When using AI, define the role, audience, tone and goals. Then, iterate, share examples, and treat AI like a junior or new team member. Ask it to think, show its reasoning and provide alternatives.

Examples of Micro-Pilot Test Cases

- Testing AI for grant proposal outlines
- Drafting campaign messaging
- Creating first drafts of board materials

Adoption focuses on tools.

Evolution focuses on **mindset**.



# FROM ADOPTION TO EVOLUTION

Responsible AI adoption starts with people, not platforms. Use the questions below to spark your first leadership or board conversation regarding AI. Many organizations find this discussion takes 30 minutes and provides immediate clarity on next steps.

## **AI Readiness Self-Assessment**

- 1.** Do staff already use AI informally?
- 2.** Do we have written guidelines?
- 3.** Have we discussed AI with the board?
- 4.** Have we tested low-risk use cases?
- 5.** Do we have an AI champion?
- 6.** How are we prioritizing human judgment and relationships?
- 7.** How are we watching for and addressing potential trust risks?

## **How The Curtis Group Helps**

We help nonprofit leaders move from curiosity to clarity through fundraising training and support

- Fundraising Program Assessment
- Fundraising Strategy and Capacity Building
- Staff & Board Training and Workshops

# WHAT TO DO IN THE NEXT 90 DAYS

**You do not need a multi-year plan to begin.**

## **Month 1**

- Discuss AI at a leadership or board meeting
- Name an AI Champion
- Draft AI Governance Policy

## **Month 2**

- Draft AI usage guidelines
- Identify 2–3 low-risk micro-pilots
- Test and share learnings across teams

## **Month 3**

- Review lessons learned
- Decide training needs and additional pilots