



thread
strategies

AI WITH INTENTION: FROM TRENDS TO IMPACT



Bloomerang Fundraiser Focus Week

THREAD INTRODUCTION

Thread Strategies is a women-led fundraising consulting firm that specializes in supporting small nonprofits. We believe every nonprofit is capable of fundraising utilizing sector best practices, and we create customized development programs to chart each partner's own course to success.

We approach consulting as partners and teammates, and we live by the phrase **"Do the Work."** We work at ground-level with our partners, modeling how to do the work so the steps to implementation are clear.



WORKING HAND-IN-HAND WITH OUR PARTNERS

Thread works with our partners to understand, design, and implement the fundraising program that is best suited for each organization, team, and community. Our support covers:

1. Performance and practices assessment: What have you been doing and how well is it working? What else is worth your time? What's definitely not?
2. Strategy: We write plans that are right sized to each organization and model how to work the plan.
3. Systems: We help sort out all the systems, software, and other structures nonprofits need to fundraise efficiently.
4. People: We can help to stop the revolving door of staff turnover by hiring and preparing team members to succeed.

Before working with Thread, **37% of partners** believed fundraising got easier year-over-year. One year after working with Thread, **100%** believe it does.



AGENDA

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01

Why Have a Use Case?

Understand the purpose and benefits of a clear AI use case

02

Building Your Use Case

Design your unique use case to bridge current reality and desired outcomes

03

Choosing a Tool

Evaluating and selecting a solution

04

Bringing it All Together

Implementing the framework



01

Why Have a Use Case?

Understand the purpose
and benefits of a clear AI
use case



LANDSCAPE

92%

Of organizations are using AI in some capacity

57%

Have no formal AI guidelines

71%

Have no AI strategy



A CLEAR USE CASE

Can minimize harms and maximize impact

- Purposeful usage helps limit environmental impact
- Proscribed roles can assuage fears about job losses
- Strong policies mitigate risks for bias, inaccuracy, and privacy
- Keeps people at the center – maintaining human touch and freeing you up to increase personal contact



BENEFITS OF AI IN FUNDRAISING

All types of AI promise significant efficiency and productivity gains to nonprofit fundraising.



Time Saver

Automate repetitive tasks, allowing you to focus on strategic work.



Complex Problem Solving

Handle intricate tasks, such as donor data or predicting giving patterns.



Enhanced Engagement

With personalized content, fundraisers can build more meaningful relationships with donors.



USE CASES FOR AI IN FUNDRAISING



Content Generation

AI can create tailored donor communications, emails, social media posts, create images or sounds.



Prospecting

Identify potential donors based on data analysis and/or donor personas.



Predictive Giving Analytics

AI algorithms can predict donor behavior and preferences.



Project Management

AI tools can streamline fundraising campaigns and project workflows.



02

Building Your Use Case

Problem-solving with AI: Bridging current reality and desired outcomes



PROBLEM SOLVING WITH AI

Identify your fundraising challenges

- What specifically is taking up your time?
- What problem are you trying to solve?
- What gets in the way of achieving your goals?

Identify your strengths

- What do you like most about fundraising? What practices/process bring you the most joy?
- What do you think are your strengths in this field from the experiences you have to date?



A SPACE FOR AI IN YOUR WORKFLOW

I wish I had more time to do _____, which only I can do.

Doing _____ takes up a lot of my time and keeps me from getting to _____.

If I could spend more time doing _____, the impact for my organization would be _____.

CURRENT STATE & DESIRED OUTCOMES

Bridging the gap with AI

- Articulate your end goal. What different, and better, outcomes would you like to see from your fundraising efforts?
- How can AI address these problems or free up your time?
- What do you already have, and what do you need?
 - Do any of your digital tools already incorporate AI?
 - Is it “turned on” already or do you need to upgrade to access it?



CURRENT STATE & DESIRED OUTCOMES

Do you have the information to make the tool successful?

- What data do you collect? How organized is it?
- Do you have the right data/information to be able to accomplish that goal or do you need make changes in your strategy before you can utilize AI?
- How would you measure success?



03

Choosing a Tool

Evaluating and
selecting a solution



POTENTIAL AI TOOLS

- What *type* of AI tool would best meet your needs?
 - Content generation tool, chatbot, predictive tool, etc.
- Create an initial list of potential tools in this category
- Describe how this list of options would meet your goals
- If you aren't sure what the options are and can't easily start a list with simple Googling (or by asking an AI tool for help!), identify the *type* and how it would meet your goal



CHOOSING A TOOL

Gather a cross-functional team to ask key questions

- Will this tool solve the issue you have identified? Does it align with your overall strategy?
- What impact on my work would this tool have? Does it free me up to spend my time where it has the greatest impact?
- What is the cost? Does it fit our budget?
- What is the timeline to become fully operational with the tool? What kind of special expertise is needed. What would be the learning curve/training timeline?



RESPONSIBLE USE

Responsibility as a factor of choice

- **Privacy by Design:** What is the data privacy policy for the tool? You want to incorporate privacy protections into AI system design from the outset
- **Adherence to Regulations:** Does the tool comply with data protection regulations (such as GDPR, CCPA, or HIPAA)
- **Transparency:** How does the system collect, process, and use personal data?
- **User Consent:** Does your use case require any personal data? If so, what is your process to obtain explicit consent from users before collecting and using their data. Opt-in mechanisms are preferable to opt-out options.



TEST AND ANALYZE

Always test a new tool before deploying it at scale

- Accuracy and reliability
- Bias and fairness
- Scalability
- User experience
- Integrations with other organizational systems
- Return on investment



04

Bringing it All Together

Implementing the framework



BRINGING IT ALL TOGETHER

- Many tools will offer examples for use cases
- Evaluate options against the framework we shared
 - Identify your challenges
 - Name the desired outcomes
 - Evaluate options
 - Test and analyze
- You don't have to do everything. Adopt what you can use regularly and responsibly to help transform your fundraising.



THANK YOU!

We'd love to hear from you!

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on LinkedIn**



Loree Lipstein
Founder & CEO



Sara LaCava Lieberman
Principal

