

AI TOOLS

A Practical Guide to Working Smarter with AI

GENERAL-PURPOSE AI ASSISTANTS (Work + Personal)

▶ **Claude (Anthropic)** — *Thoughtful writing, analysis & long documents*

claude.ai

- Drafting grant proposals, case statements, and donor letters
- Analyzing donor data, budgets, and board reports
- Researching foundations, giving trends, and campaign strategies
- Long-form document work: annual reports, strategic plans, acknowledgment letters
- Safe, nuanced responses — great for sensitive donor communications

▶ **ChatGPT (OpenAI)** — *Versatile assistant for almost any task*

chatgpt.com

- Brainstorming fundraising campaign concepts and event themes
- Drafting emails, social posts, thank-you scripts, and talking points
- Summarizing research and creating donor briefing sheets
- Generating meeting agendas and board presentation outlines
- Personal use: recipes, travel planning, gift ideas, general Q&A

▶ **Google Gemini** — *Deep Google integration — ideal if you live in Google Workspace*

gemini.google.com

- Summarizing emails, drafting replies, and managing Gmail
- Working inside Google Docs, Sheets, and Slides natively
- Pulling real-time information with Google Search integration
- Calendar-aware scheduling and follow-up reminders
- Personal: trip planning with Google Maps context built in

▶ **Microsoft Copilot** — *AI built directly into Microsoft 365*

copilot.microsoft.com

- Drafting and editing in Word without leaving the app
- Creating data summaries and charts in Excel
- Generating PowerPoint slides from a brief outline
- Summarizing long email threads and drafting responses in Outlook
- Ideal if your organization is already on Microsoft 365

RESEARCH & INFORMATION TOOLS

▶ **Perplexity AI** — *Real-time research with cited sources*

www.perplexity.ai

- Quickly researching foundation priorities and grant deadlines
- Pulling current nonprofit sector news and giving trends
- Summarizing lengthy reports or white papers with source links
- Competitor and peer organization research
- Personal: fact-checking, product comparisons, finding best-rated services

▶ **NotebookLM (Google)** — *Upload YOUR documents — AI learns from them*

notebooklm.google.com

- Upload grant guidelines, annual reports, case statements, or research PDFs
 - Ask questions and get answers sourced directly from your uploaded materials
 - Create donor briefing documents by uploading a prospect 990, bio, and news articles
 - Generate audio podcast summaries of lengthy documents — great for busy board members
 - Synthesize multiple sources at once: compare three foundation RFPs side by side
 - FREE to use with a Google account — one of the most underrated AI tools available
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▶ **Claude / ChatGPT with web search enabled** — *Conversational deep-dives with up-to-date information*

claude.ai

- Researching specific donors, corporations, or foundations
- Finding best practices for specific fundraising challenges
- Trip planning: hotels, itineraries, local recommendations
- Shopping research: comparing products, finding deals, reading reviews

WRITING & CONTENT CREATION

▶ **Jasper AI** — *Marketing copy and campaign content at scale*

www.jasper.ai

- Writing fundraising campaign copy, direct mail, and digital ads
- Creating consistent brand voice across multiple channels
- Generating social media calendars and post variations
- Email sequences for donor acquisition and stewardship

▶ **Grammarly** — *Writing polish and tone checker*

www.grammarly.com

- Proofreading grant proposals, donor letters, and reports
- Adjusting tone (formal, warm, urgent) for different audiences
- Checking email clarity before hitting send
- Personal: proofreading anything from cover letters to texts

▶ **Canva AI (Magic Write + Design tools)** — *Visual content and graphic design with AI assist*

www.canva.com

- Designing event invitations, social graphics, and appeal mailers
- Generating on-brand images and layouts from text prompts
- Creating donor impact reports and infographics
- Personal: holiday cards, party invitations, photo projects

PRODUCTIVITY & PROJECT MANAGEMENT

▶ **Notion AI** — *All-in-one workspace with built-in AI*

www.notion.com

- Managing campaign timelines, task lists, and team wikis
- Auto-summarizing meeting notes and action items
- Building a grants calendar and prospect pipeline
- Writing first drafts directly in your project workspace

▶ **Otter.ai** — *AI meeting transcription and summaries*

otter.ai

- Auto-transcribing donor meetings, staff calls, and board meetings
- Generating action item summaries from recorded conversations
- Capturing prospect meeting notes hands-free
- Personal: recording interviews, lectures, or family stories

▶ **Motion / Reclaim.ai** — *AI-powered calendar and time management*

www.usemotion.com

- Automatically scheduling tasks around your calendar
- Protecting focus time during busy campaign seasons
- Optimizing meeting scheduling for your team

IMAGE GENERATION (Creative + Fun!)

▶ **DALL-E (within ChatGPT)** — *Generate custom images from text descriptions*

chatgpt.com

- Creating concept visuals for event themes and campaigns
- Generating unique imagery for social posts or presentations
- Personal: custom artwork, greeting cards, creative projects
- Fun: turning descriptions into illustrations or fantasy portraits

▶ **Adobe Firefly** — *Professional AI image generation inside Adobe tools*

firefly.adobe.com

- Generating royalty-safe images for publications and marketing materials
- Editing photos and graphics inside Photoshop with AI fill
- Creating polished visual assets for annual reports and campaigns

▶ **Midjourney** — *Stunning, artistic AI image generation*

www.midjourney.com

- Producing high-quality artistic visuals for galas, campaigns, or branding
- Creating mood boards and concept art for events
- Personal: beautiful custom art, fantasy landscapes, creative exploration
- Fun: one of the most impressive wow-factor AI tools to demo

AUDIO, VIDEO & PRESENTATION TOOLS

▶ **Loom + AI Summary** — *Async video messaging with AI recaps*

www.loom.com

- Recording quick video updates for remote donors or board members
- Auto-generating transcripts and key point summaries
- Replacing long email chains with short video messages

▶ **Descript** — *AI-powered audio and video editing*

www.descript.com

- Editing podcast episodes or donor testimonial videos like a document
- Removing filler words and silences automatically
- Creating captions and social media clips from longer videos

▶ **Gamma** — *AI-generated presentations and decks*

gamma.app

- Building polished board presentations and donor decks in minutes
- Creating visual one-pagers and impact reports
- Presenting data in a clean, modern format without design skills

FUN

▶ **ChatGPT / Claude for Recipes** — *Your personal sous chef*

chatgpt.com

- Getting recipes based on what is already in your fridge
- Scaling recipes up or down for dinner parties or events
- Finding substitutions for dietary restrictions
- Meal planning for the week in minutes

▶ **AI Trip Planning (Claude, ChatGPT, Gemini)** — *Personal travel agent at no extra cost*

claude.ai

- Building full day-by-day itineraries with times and logistics
- Finding hidden gem restaurants, activities, and neighborhoods
- Comparing hotels and flights based on your priorities
- Creating packing lists and travel checklists

▶ **Spotify AI DJ / Suno** — *Music generation and smart playlists*

suno.com

- Suno: generate original songs from a text prompt — surprisingly fun!
- Spotify AI DJ: personalized music with AI commentary
- Creating themed playlists for events and galas
- Personal: composing a custom song as a unique gift

▶ **Character.AI / Pi (Inflection)** — *Conversational companions and coaching*

character.ai

- Pi: a calm, coaching AI for personal reflection and thinking through decisions
- Character.AI: fun role-play, practicing difficult conversations, creative storytelling
- Great for preparing for tough donor or board conversations in a low-stakes way

▶ **AI Photo Fun Apps (ToonMe, Lensa, YouCam, Fotor)** — *Turn your photos into art, cartoons, and creative portraits*

toonme.com

- ToonMe: transforms family photos into Disney-style cartoons and animated characters
- Lensa AI: creates stunning artistic magic avatar portraits from selfies
- YouCam Perfect: AI photo editing, background swap, and fun filter effects
- Fotor AI: photo-to-painting, sketch, anime, and watercolor conversions
- Perfect for event fun - guests love seeing themselves as cartoon characters!
- Great for creating unique thank-you cards, team photos, or gala keepsakes

FUNDRAISING-SPECIFIC AI TOOL

▶ **Gift Planner's Workstation with Frank (EstateGiftPlanning.com)** — *AI copilot built specifically for planned giving professionals*

- Frank is an AI research copilot that navigates planned giving structures and tax law
- Generates customized, compliant donor proposals for complex gift vehicles (CRTs, CLTs, bequests, etc.)
- 23 chapters and 250+ subchapters on all planned giving topics with IRS code citations
- Updated monthly with latest private letter rulings, revenue rulings, and tax court cases
- Ask Frank scenario-based questions and get a full gift plan outline in minutes
- Membership-based with a 7-day free trial at [estategiftplanning.com](https://www.estategiftplanning.com)

💡 *Most tools have a free tier — start there! Paid plans typically run \$10–\$30/month and are often worth it for heavy users. Always review your organization's data privacy policy before entering donor or confidential information into any AI tool.*