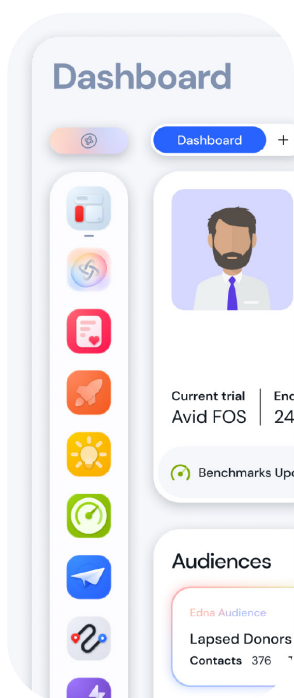




Fundraising is Human Work

How to Scale with AI While Keeping Humans at the Center



A practical guide for fundraising teams

INTRODUCTION

Fundraising Is Human Work.

If you've spent any time in a fundraising seat, you already know this.

The relationship. The trust. The phone call you make to thank a donor before the gift clears. The handwritten note. The way you remember and relate to a donor's hobbies, family, and interests when you meet with them.

Those things can't be automated. They shouldn't be.

But here's the problem. All the other work around that donor relationship has becoming radically more complex—the data, the segmentation, the list pulls, the campaign setup, the reporting, the coordination between eight different tools.

The relational demands of fundraising are human. But the other work has gotten so busy that there's not enough time left for the human part.

Some tools want you to automate your donor outreach with AI. This might have short term gains, but it's the wrong long-term solution.

The better path? Automate the work that gets in the way of connecting with your donors.

This guide is about how to do exactly that in a practical, responsible way. A way that keeps the human at the center of your fundraising.

Using AI in fundraising is inevitable. The choice is whether you use it to replace the fundraiser or to give the fundraiser more time to be human.



The Two Things AI Should Never Do in Fundraising

AI needs guardrails.

At Avid, we have two very strong AI guard rails that we believe fundraisers should build from.

AI should never own the relationship.

A donor relationship is built on trust, consistency, and the belief that the organization they give to actually knows and values them. That trust lives with a human.

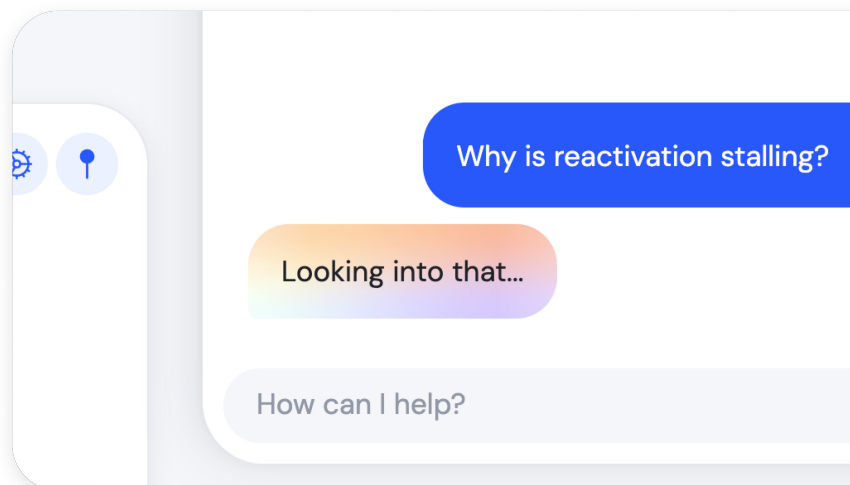
Left to its own devices, AI might be really good at winning the gift in the moment. But our long-term mission is in jeopardy if there's no human connection. You'd be hard-pressed to find someone willing to give a 6-figure donation who has never interacted with an actual human being from the organization.

AI should never make the final call.

Great fundraising relies on your judgement. When should you make the upgrade ask? How do you respond to a complaint? Should you pause a campaign mid-cycle? These decisions require context, relationship history, and human wisdom that no model has reliably demonstrated. The final call should always belong to a person.

Everything else — the data processing, the segmentation, the audience building, the first draft — is fair game.

You own the relationships. You make the final calls. AI can handle all the in-between work that otherwise leads to burn out.



Where Your Hours Are Actually Going

Most fundraising teams have a capacity problem before they have a strategy problem. They know what they'd do with more time: a personalized mid-level donor series, a lapsed reactivation campaign built on actual giving history, finally updating that new donor series.

The growth opportunities are there. It's a matter of seeing them in time, and having enough hands to take action. Instead, your team's capacity gets drained by all the coordination and execution work.

Most work gets divided into 4 main buckets:

- **Relational work:** Donor calls, relationship stewardship, major gift conversations, personal acknowledgments. Only humans can do this. It should get the most of your time—but it's usually last on the to-do list.
- **Strategic work:** Campaign strategy, message development, program direction. Humans lead; AI can inform and support.
- **Coordination work:** Data syncing, list exports, tool integrations, suppression management. AI should own this. Almost no human judgment is required once the logic and rules are in place.
- **Execution work:** Campaign setup, copy drafting, audience segmentation, reporting. AI handles the heavy lifting; humans review and approve before anything goes out.

Self-Audit: Where Are Your Hours Going?

Look at your last two weeks. Estimate the hours you spent in each bucket:

Work Type	My Hours This Week	Where It Should Be
Relational		Highest priority
Strategic		High
Coordination		Near zero (AI owns this)
Execution		Low (AI drafts, you approve)

If you're like most teams, coordination and execution are eating 60–70% of your available time. That's the capacity problem — and it's where AI can give you the fastest wins.

The Scaling Trap

When fundraising teams hit capacity, most fundraisers see 3 options. None of them are great. And all of them have significant costs—both seen and unseen.

Hire more staff.

More people means more capacity — in theory. In practice, most teams don't have the budget. And even when they do, the coordination overhead grows with headcount. More people moving data between more tools isn't a solution. You end up paying more for a bigger version of the same problem.

Hire an agency.

Agencies bring some expertise, but most organizations hire them for the extra bandwidth. They need more hands to write the copy, pull the lists, create the reports, and occasionally inject some innovation.

They're also expensive, and they work on a clock. Every cycle they run, they learn more about your donors — your lists, your response patterns, your best segments. When the retainer ends, that learning walks out the door.

And that loss of knowledge often costs you more than the retainer you were paying.

Use general-purpose AI.

ChatGPT, Claude, and Gemini are genuinely useful for many things. But they don't know your donors. And they don't know fundraising. They've read about fundraising ideas, but they've never put it into action.

And if you're brave enough to share your donor data with a general-purpose AI tool, you're putting your organization's most sensitive asset into a system with terms of service most fundraisers have never read.

More people does not always equal more capacity. The biggest drain on your capacity is the friction between your data and your tools.

What to Hand Off — and How to Stay in the Loop

The two guardrails from Chapter 1 give you a reliable filter for every handoff decision. Before delegating any task to AI, ask three questions:

1. Does this task require knowing this specific donor?
2. Does the outcome directly affect a human relationship?
3. Would a donor notice — or care — if a human didn't do this?

If the answer to all three is no, the task is a strong candidate for AI. If any answer is yes, a human should be involved in the decision or review.

In Practice

Building segment of donors at risk of lapsing — No specific donor knowledge required. No relationship directly affected. Donors won't notice, and most won't care. → AI should own this.

Drafting the campaign email — AI drafts in your voice, following your brand guides, leveraging what it knows works to convert. Human reviews, refines, and approves. → AI drafts, human decides when to send.

Deciding whether to make a mid or major upgrade ask — Requires donor relationship context. Outcome directly affects the relationship. → AI surfaces the opportunity. Humans decided when to launch.

Making the donor thank you call — Relationship-critical. The donor will hear it. → AI-assists to draft the script. Human records the message or makes the call.

Filling Your Time with the Right Things

AI is good at a lot of things. But there is **some work that only a human can do**.

The human presence felt in a donor conversation. The time spent actively listening to a donor's passions and concerns. The ability to judge where to go next with this specific donor. The ability and the bravery to say no.

AI handles the tactics. The relational work—the work that requires judgment—is yours.

*AI should never replace the fundraiser—fundraising is human work.
The AI surfaces the opportunity, the human decides to take action.*

What to Scale First: A Prioritized Playbook

Not all automation delivers equal value. Some handoffs save you hours with almost no risk. Others require more care and human judgement. Here's where to start.

Start Here: High impact, low risk

- **Audience segmentation and list building** — Stop pulling manual CRM exports. Let AI build segments dynamically from live donor data: recency, frequency, giving level, channel behavior, lapse window.
- **Suppression and deduplication** — No more 4am list pulls to update the email list before the next send. No more donors getting another appeal the day after they just gave. Automating your list suppression eliminates costly, relationship-damaging mistakes—and saves you more hours than you'd like to count.
- **Cross-tool data sync** — Donor data should move between your CRM, email platform, and giving tools automatically — not via a weekly CSV exported on Thursdays.

Next: High impact, moderate setup

- **Campaign copy drafts** — AI drafts appeals, advertising, donation pages, and acknowledgment copy in your organization's voice. You review, edit for relationship nuance, and approve.
- **Lapse detection** — Instead of learning a donor lapsed when they surface in a quarterly report, AI monitors your file continuously and flags donors approaching lapse thresholds in real time.
- **Upgrade opportunity identification** — Which donors are giving below their capacity right now? Who's most likely to upgrade? AI surfaces these with precision; a human decides when to act.

Then: Campaign-level automation

- **Full campaign staging** — Audiences built, copy drafted, sequence mapped, timing set, messaging personalized — all staged for human review and approval. The campaign is ready; you decide when to launch.
- **Matchback reporting** — Automatically match your direct mail file against subsequent giving across all channels to see what each campaign actually drove in revenue. No analyst required.
- **Deployment** — Sync your audiences and deploy your campaign all from a single location. The campaign is staged. Your segmentation is ready. All you have to do is say "Go." No more manual configuration.

AI adoption begins with tasks that are furthest from the donor. Work your way toward more nuanced tasks—keeping a human as the final authority.

The 9-Question Test for Any AI Tool You're Considering

Not every AI tool is built for fundraising. Most aren't.

Even the AI tools built into most CRMs don't actually know about effective fundraising. They're just ChatGPT in disguise.

Before you commit to any platform, run it through this checklist. The answers will tell you what you need to know.

1. Does it have direct access to your donor data — or do you have to paste it in?

If you're copying and pasting data into a chat window, you've already lost the leverage.

2. Does it know giving history, lapse patterns, and channel behavior across your full stack?

An AI that only looks at data from the CRM is making decisions on partial information.

3. Does it connect to your CRM, email platform, and giving tools — or create another silo?

Silos drain capacity. If your AI creates another silo, the problem is getting worse—not better.

4. Does it surface opportunities proactively — or only respond when you ask?

An effective AI tool doesn't wait to be prompted. It watches your file and shows you the opportunity.

5. Does it preserve human review before anything goes to a donor?

If a tool can deploy campaigns without a human sign-off, that's a feature that will harm relationships.

6. Is it built specifically for fundraising — or repurposed from a general-purpose tool?

The best fundraisers haven't just read about it—they've done it. Generic AI was trained on the internet, not on real donor interactions.

7. Does it get smarter about your program over time — or start from scratch every session?

If you have to retrain your AI every time you need something, it's not a fundraising partner. It's a search engine.

8. Does it come with fundraising expertise alongside the technology?

Software alone isn't enough. The best AI-powered fundraising tools are built by humans who have been in the fundraising seat—and are there to support you.

9. Is your donor data protected — or being used to train someone else's model?

Your donors' data is not a training resource for an AI model to mine. Avid ensures no AI ever even sees your donor data.

General-purpose AIs fail the test. So do most AI chatbots build into your CRM. Avid was built by fundraisers—keeping the human at the center.



CONCLUSION

Scale With AI to Make Time for the Human Work

Scaling with AI is not the same as “automating your fundraising.”

The goal is to automate the tasks that keep you from doing the human work. When that happens, the relationships get better. The campaigns get smarter. The donors feel more known. And the team stops feeling like it’s drowning.

That’s what scaling the right way looks like. Not more tools. Not more staff. Not more generic AI.

You need a system that handles the operational load so your team can focus on the work that actually moves donors — and keeps them.

AI adoption begins with tasks that are furthest from the donor. Work your way toward more nuanced tasks—keeping a human as the final authority.

Ready to see it in practice?

You were made for the mission. Avid was made for the rest.

Avid is the AI fundraising agent built to give your team its time back — without taking the human out of the equation.

- **See how Avid works:** avidai.com/fos4
- **Watch a 6-minute demo:** avidai.com/fos4-video-demo
- **Book a time to get a personal tour:** avidai.com/demo

