



# AI and the Future of Your Nonprofit

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StratusLIVE

# MEET THE SPEAKER



**Jim Funari**  
StratusLIVE CEO

# Agenda

- Transformational Promise
- Why AI Matters NOW
- Understanding AI and its Use Cases
- Role of C-Suite Leadership
- Impact on Leaders and Staff
- StratusLIVE's AI Initiatives
  - Current
  - Coming

# The AI Revolution

**“AI will not destroy the world,  
and in fact may save it.”**



***Marc Andreessen  
Investor and Creator  
of 1st Internet Browser***



# ● The AI Revolution

**"Within 10 years, AI will replace many doctors and teachers – humans won't be needed for most things."**



***Bill Gates***  
***Microsoft Founder***

# ● The AI Revolution

**"I've always thought of AI as the most profound technology humanity is working on – more profound than fire or electricity..."**

<https://fortune.com/2023/04/17/sundar-pichai-a-i-more-profound-than-fire-electricity/>

**Sundar Pichai**  
**Google CEO**





# The AI Revolution

**On the rapid pace of AI – “we are shifting into the world of Novel Scientific Discoveries and Frontier Research, never proven or confirmed by Scientists.”**

Inside the AI Driven Economy with Sarah Friar of OpenAI  
<https://www.youtube.com/watch?v=i9H6NdHsF4c&t=732s>

***Sarah Friar***  
***OpenAI CFO***



# The AI Revolution

**"Artificial Intelligence will be the most transformative technology of the 21<sup>st</sup> century"**

***Jensen Huang***  
**NVIDIA CEO**





# The AI Revolution

**"Artificial Intelligence is the last invention humanity will ever need to make."**

**"Things will get weird in the next 3 years."**

Are we headed for AI Utopia or Disaster?  
[https://www.youtube.com/watch?v=N9sF\\_D0Z5bc](https://www.youtube.com/watch?v=N9sF_D0Z5bc)



**Nick Bostrom**  
**Future of Humanity**  
**Institute**  
**Oxford University**

● AI

C'mon...

You can't be serious?





# Why make these claims?

## Hyperbole?



# ● The AI Revolution

**"The AI – LLM you are using today is the worst AI you will use for the rest of your life."**

**"We're moving so much faster. Every 3 or 4 months, there's a new o-series model. Each a step up in capability, each cheaper than the previous."**

[https://www.youtube.com/watch?v=scsW6\\_2SPC4&t=4460s](https://www.youtube.com/watch?v=scsW6_2SPC4&t=4460s)



**Kevin Weill**  
*OpenAI CPO*

# The AI Revolution

## The models and capabilities have:

- Greater expertise, reasoning, speed
- Larger context windows – or the amount of data the chat context can consume and process
- Lower costs / fees
- Higher quality and accuracy, less frequent “hallucinations”

ChatGPT o3-mini ▾

Model ⓘ

GPT-4o

Great for most questions

GPT-4o with scheduled tasks BETA

Ask ChatGPT to follow up later

GPT-4.5

RESEARCH PREVIEW

Good for writing and exploring ideas

o1

Uses advanced reasoning

o3-mini

Fast at advanced reasoning ✓

o3-mini-high

Great at coding and logic

More models >



# Why AI Matters to Nonprofits Now?



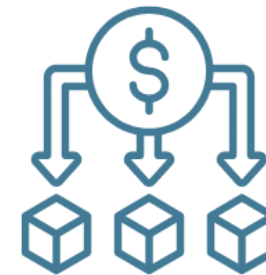
## Rising Expectations

Donors expect digital-first, personalized engagement



## Cost Pressures

AI can improve operational efficiency & reduce costs



## Revenue Diversification

Identify and acquire new donors and income sources



## Mission Delivery

Analyze needs and optimize programs to maximize impact



# Rising Expectations for Digital Engagement & Personalization

*“Donors compare your digital experience to Amazon and Netflix — not other nonprofits.”*

– Beth Kanter, nonprofit tech thought leader



## ➤ Digital First Experiences! Donors, volunteers, stakeholders expect it!

- **73% of donors expect personalized engagement** based on past interactions (*Nonprofit Trends Report*).
- **60% of Gen Z and Millennials prefer digital communication and self-service** (*Blackbaud Charitable Giving Report*).
- AI enables **real-time personalization** through segmentation & next-best-action recommendations.

## ➤ AI closes the gap between commercial and nonprofit User Experiences

- ChatGPT, Microsoft Copilot, and Gemini are raising the bar – can you match it?



# Escalating Cost Pressures & Resource Constraints

*“AI and automation are no longer luxuries – they’re requirements for sustainability in today’s operating environment.”*

– Beth Kanter, nonprofit tech thought leader



- **Nonprofits under increasing budget pressure**
  - **57% of nonprofits report rising operating costs and flat or declining revenue** (*Nat. Council of Nonprofits*).
  - **Most nonprofits face chronic understaffing and turnover**, esp. in Development and Marketing.
- **AI drives operational efficiency**
  - **“By 2026, organizations that full adopt AI** into their operations could see **productivity improvements of up to 40%** ... thru process automation, decision augmentation, and optimized resource allocation” (*The Economic Potential of AI, McKinsey Global Institute*).
  - **Better, Faster** Prospect Research, Major Gift Cultivation, Grant Discovery and Application, Volunteer Matching and Recruitment, Marketing Communications, Gift Processing, Mission Delivery.



# Revenue Diversification & New Donor Acquisition

*“AI –optimized donor journeys have been shown to increase avg donation by up to 20% in A/B Testing.”*

*– McKinsey on Nonprofit Growth, 2023.*



- **Traditional fundraising no longer sufficient**
  - **Donor acquisition costs have doubled** in the past five years, **while overall donor counts are declining** (*Fundraising Effectiveness Project*).
  - **Individual giving fell by 6.4% in 2022 and down again in 2023** in inflation adjusted terms (*Giving USA*).
- **AI enables smarter acquisition of income streams**
  - **Predictive Analytics can identify high-likelihood prospects**, improving ROI.
  - **AI-driven prospecting tools scan many sources** to surface non-traditional segments.
  - **Behavioral and personalization models** tailor acquisition strategies.



# Mission Delivery, Impact Measurement, & Beneficiary Engagement

*“UNICEF uses AI to analyze social sentiment and local public data to improve real-time response during crises – a model for social services.”*

– UNICEF Office of Innovation.



- **Data-informed program delivery *not* optional**
  - **Expected to report on outcomes**, not just outputs
  - **Funders demand evidence** of impact, efficiency, and targeting of resources
- **AI powers smarter mission delivery**
  - **AI can analyze beneficiary** populations and situations.
  - **AI in digital interfaces can reach** multilingual or neurodiverse populations.
  - **Sentiment analysis** can improve service.
  - **AI enables optimization of resource allocation** based on needs and historic outcomes.

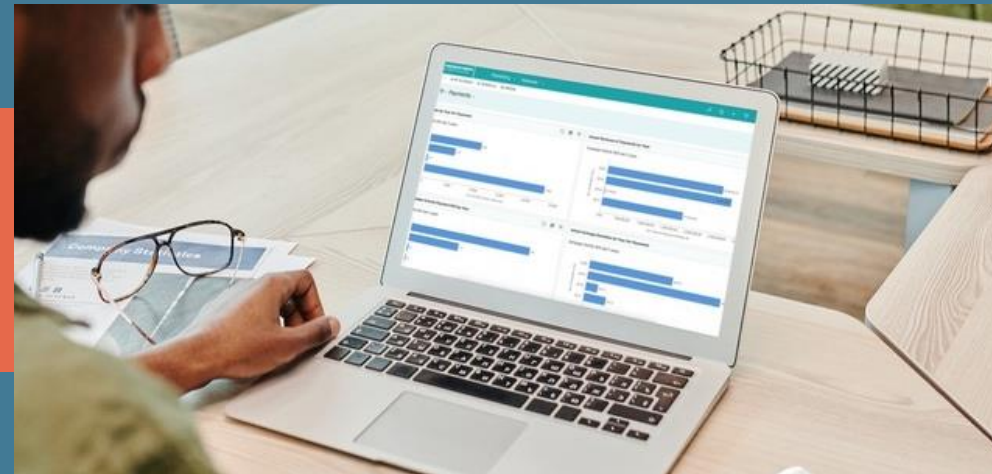


# AI Application Impact in 3 Categories



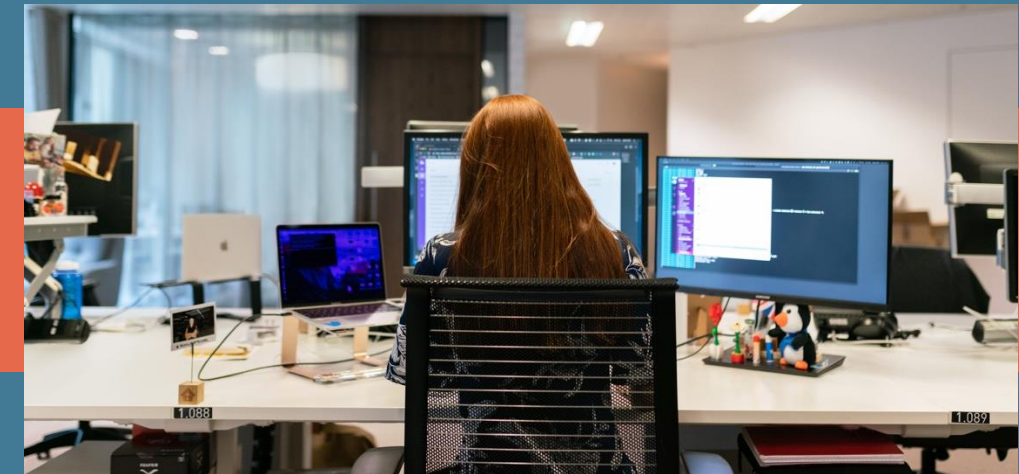
## Productivity & Collaboration

Generative eMail & Communications  
Scheduling & Meeting Assistance  
Content Generation & Summarization  
Generative Procedures & Policies  
Research



## Enterprise Business Systems

Fundraising & Development  
Marketing & Digital Engagement  
Donor Services  
Volunteer Management  
Event Management  
Financial Gift Processing  
Human Resources



## Mission Delivery

Program Impact Analysis  
Resource Allocation  
Client Support Services



# What is an AI Agent?

**Think of an AI Agent as a digital team member —**

one that can research, communicate, make recommendations, and take action—all without waiting for human instruction.





# What is an AI Agent?

An autonomous software system that **perceives its environment, makes decisions, and takes actions** to accomplish specific tasks or goals without continuous human supervision.

Unlike simple AI tools that respond only to direct queries, agents ...

1. **Operate independently** after setup
2. **Proactively monitor** conditions
3. **Make decisions** based on changing conditions
4. **Take actions** without requiring human approval step
5. **Learn** from outcomes, successes, failures
6. **Handle end-to-end processes** rather than single tasks

# Agent Use Cases in Nonprofits

StratusLIVE

## USE CASES OF AI AGENTS IN NONPROFITS





# AI AGENT FOR MAJOR DONOR CULTIVATION

## INPUTS / DATA TYPES

- ✓ DONOR PROFILE DATA (DEMOGRAPHICS, GIVING HISTORY, WEALTH RATING)
- ✓ ENGAGEMENT HISTORY (EMAILS OPENED, EVENTS ATTENDED)
- ✓ RELATIONSHIP NETWORKS (BOARD AFFILIATIONS, PEER CONNECTIONS)
- ✓ CAPACITY + AFFINITY SCORES
- ✓ CAMPAIGN PRIORITIES & MESSAGING THEMES

## DATA SOURCES



**STRATUSLIVE 365 CRM:**  
DONOR RECORDS, PLEDGE HISTORY,  
INTERACTION TIMELINE



**WEALTH SCREENING SERVICES:**  
iWAVE, WEALTH ENGINE, DONORSEARCH



**STRATUSLIVE IGNITE DIGITAL PLATFORM:**  
EVENT ATTENDANCE AND VOLUNTEER  
DATA



**LLM:**  
TRAINED ON BEST PRACTICES IN  
CULTIVATION, STEWARDSHIP, AND DONOR  
PSYCHOLOGY



## AGENT OUTPUTS & ACTIONS

- IDENTIFIES TOP DONOR PROSPECTS BASED ON PREDICTIVE SCORING
- SUGGESTS CULTIVATION STRATEGIES (E.G., LUNCH INVITE, BOARD ENGAGEMENT)
- DRAFTS PERSONALIZED CAMPAIGN CASE STATEMENTS
- DRAFTS SUPPORTING OUTREACH MESSAGES (VISIT PLANS, CALLS, E-MAIL ALIGNED TO GIVING MOTIVATION)
- SCHEDULES REMINDERS FOR NEXT TOUCHPOINT
- RECOMMENDS ASK AMOUNTS AND TIMING BASED ON DONOR'S GIVING CAPACITY AND INTEREST AREA
- RECOMMENDS INFLUENCERS IN PROSPECT NETWORK AND DRAFTS REQUESTS FOR ASSISTANCE WITH PROSPECT



# AI in Your Organization

# Role of the C-Suite – Leading AI Strategy

## ➤ Align AI Initiatives with Mission & Ethical Considerations

- Board and Governance Buy-in
- Management Team Commitment

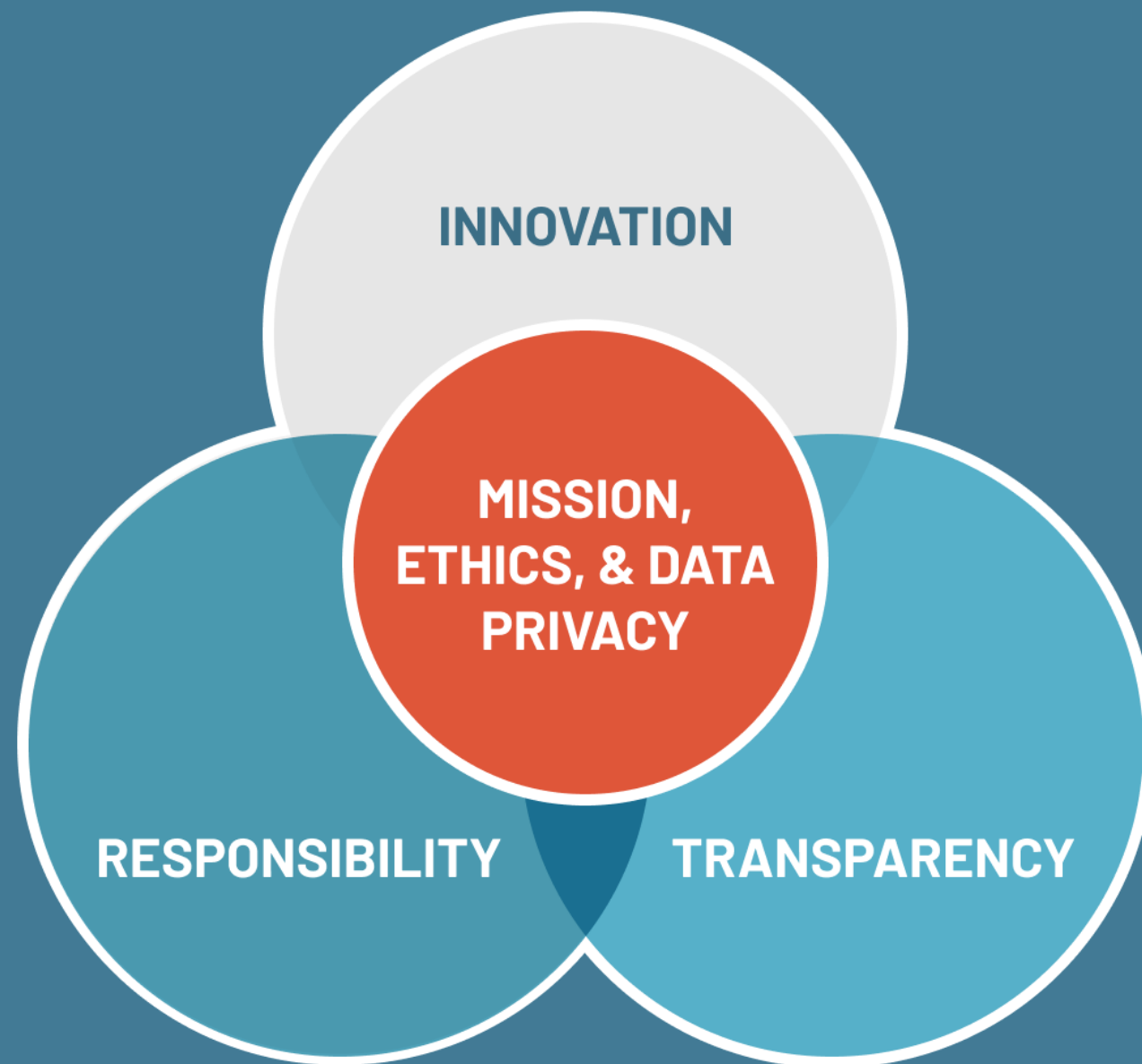
## ➤ Create an AI Centric Culture thru Training & Leadership

- Transformational and Existential
- Human Issues First





# Ethics, Accountability, and Governance in AI



## Mission

- Does it enable our Mission?

## Ethics

- Are we using it ethically with respect to our values?

## Data Privacy

- Are we maintaining data privacy standards?

# Create an AI Centric Culture – Training & Leadership



## Prescriptive Upskilling

- Permission to experiment.
- But gradually add objectives.

## Pilot Programs

- Gain participation, then scale successes.

## Partner with Us

- Participate in upcoming product trials.



# Impact on Leaders & Staff

**"AI will not replace managers, but managers who use AI will replace those who do not."**

*Harvard Business  
Review*



# Rethinking Work in the Age of AI

Area	Current State	AI-Enhanced Future
Job Descriptions	<i>Task-based</i>	<i>Skill-based + Adaptive</i>
Performance Reviews	<i>Effort &amp; Output</i>	<i>Outcomes + Collaboration</i>
Onboarding	<i>Fixed Checklist</i>	<i>Exploratory, Tool-Centric</i>
Training	<i>Annual Seminars, Courses</i>	<i>Continuous, On-Demand Learning</i>

- Roles are **evolving: judgment, creativity, and adaptability** are core
- Static job descriptions are being replaced by **dynamic skill-based models**
- **AI-literate staff** and **cross-functional teams** are key to transformation



# Rethinking Work in the Age of AI



## Common Fears

- Job displacement
- Tech complexity

## Framing the Opportunity

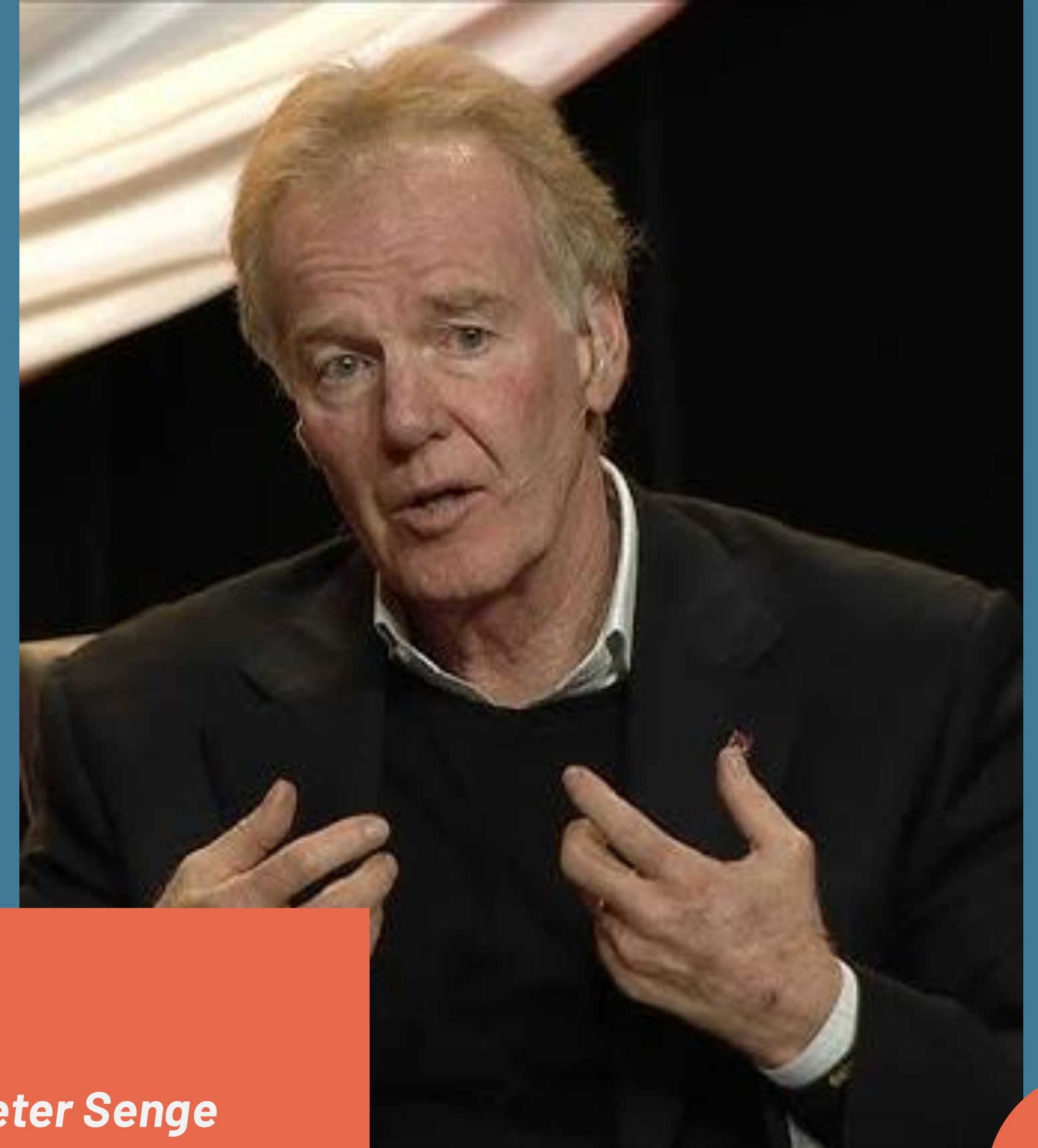
- Re-imagine work
- What would we do with 100 super-smart interns who don't sleep, complain, or drink all our coffee?

## AI is a Force Multiplier!

"A 10-person company can achieve what a 50-person organization did previously, and a 50-person the same as 500!"

# Impact on Leaders & Staff

**"The only sustainable competitive advantage is an organization's ability to learn faster than the competition"**



***Peter Senge***  
***Strategist and Author***  
***of The Fifth Discipline***



# AI Focus at StratusLIVE

# Participating in National Leadership



**FundraisingAI**

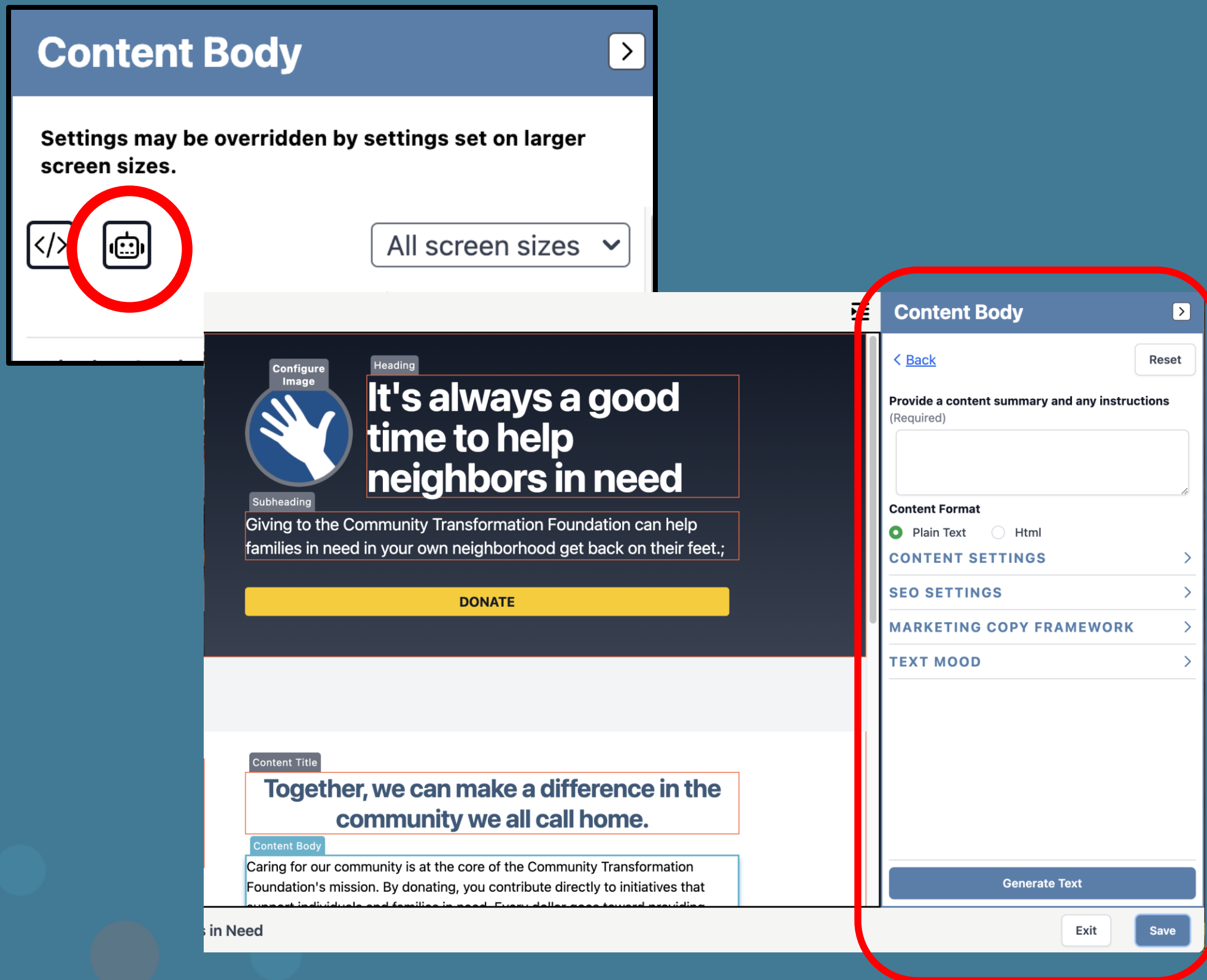
**John Funari, StratusLIVE's CTO,**  
serves on the board of **FundraisingAI**

**National organization** promoting the  
development and use of **Responsible  
and Beneficial Artificial Intelligence  
for Nonprofit Fundraising.**

<https://fundraising.ai/>



# StratusLIVE – AI Capabilities Now



## Intent, Inference, Tag, Search

- Interpreting and Tagging Content
- Semantic Search

## Marketing Copy Generation

- e-Mails
- Page Sections

## Page Generation

- Tags, Copy, and Image Generation for Entire Pages

# StratusLIVE Ignite – AI Enabled Volunteer Pages



CLICK HERE TO  
WATCH THE VIDEO



# StratusLIVE AI Framework and Architecture

## StratusLIVE Application

### AI Orchestration Layer

Microsoft Semantic Kernel and Model Context Protocol (MCP)

#### Models – (LLMs)

##### Public

OpenAI ChatGPT  
Google Gemini  
Anthropic Claude  
xAI Grok  
Amazon Nova  
Microsoft CoPilot/GPT  
➤ New

##### Private

Meta Llama  
Deepseek  
Alibaba Qwen  
Mistral  
Google Gemma  
Microsoft Phi  
➤ New

#### StratusLIVE Application Databases

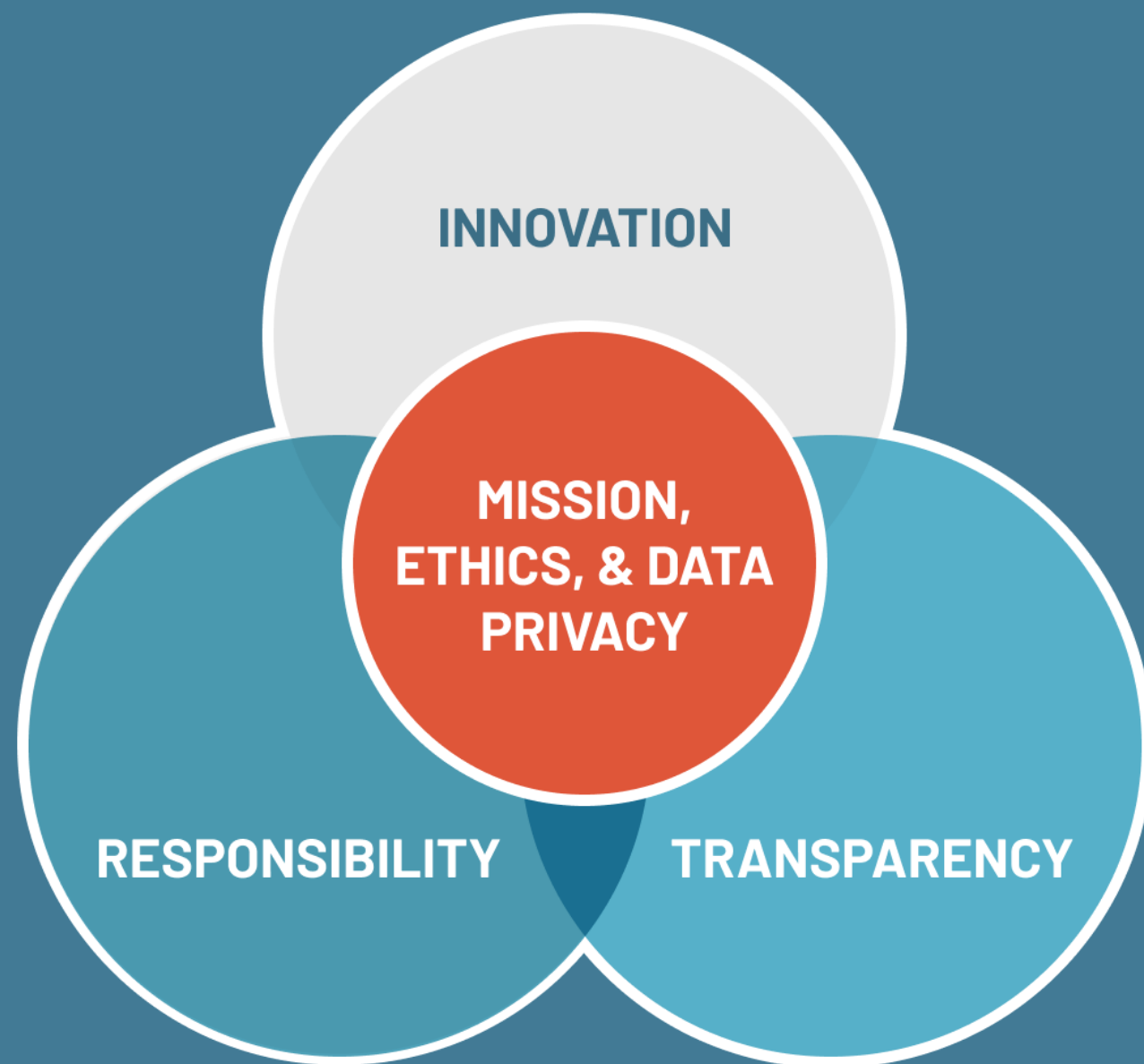
CRM  
Ignite  
Give at Work

Data Warehouse  
Data Cubes  
➤ New

#### Agents

Digital Content & Web Design Agent  
Prospect Identification and Scoring Agent  
Major Donor Cultivation Agent  
Personalized Outreach Agent  
Planned Gift Cultivation Agent  
Campaign Optimization Agent  
Donor Retention & Lapsation Prevention Agent  
Grant Discovery & Alignment Agent  
Grant Proposal Assistant Agent  
Data Quality & Enrichment Agent  
Automated Reporting Agent  
Volunteer Matching & Engagement Agent  
Impact Analysis & Storytelling Agent  
Beneficiary Needs Assessment Agent

# StratusLIVE Policy on AI and Data Privacy



## Public LLMs in the Cloud

- Restricted – No Donor PII, No IP
- Tokenized if any doubt

## Private LLMs that we host

- Same standards as CRM Database
- Secured and controlled by StratusLIVE



# Looking Ahead... *The Roadmap*

More detail in Upcoming Sessions



# New CRM UI Options with PowerBI

**Brian Billingham**  
*Chief Executive Officer @ Trace Family Medical Center*  
  
Giving Since 2020  
  
Volunteering Since 2012  
  
[bbham1@hotmail.com](mailto:bbham1@hotmail.com)

**LIFETIME DONATIONS**  
\$89,057.22

**AVERAGE GIFT**  
\$11,132.15

**LARGEST GIFT**  
\$50,000.00

**SMALLEST GIFT**  
\$100.00

**LAST DONATION**  
3/25/2025

Payment

\$257.22

Credit-Debit Card


**Engagement Score: 89 (99th percentile)**


**Current Loyal Donor**


**Monetary Range: \$10000+**

**Recency Range: 0-6 Months**

**Action Items**

 Brian's birthday was yesterday! Send a belated birthday message and reconnect with them about this year's philanthropy goals. (Birthday: April 16)

 Looks like Brian recently made a donation. Be sure to send them an acknowledgement and thank them for their generosity!

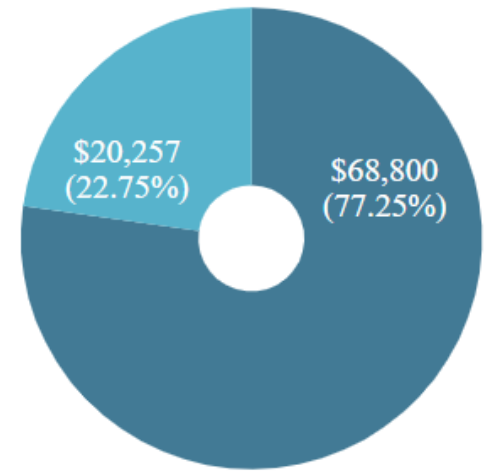
 Brian has a history of volunteering with the organization, but hasn't participated in the last 12 months. Reach out with opportunities to get them involved again.

YTD Donations	YTD Volunteer Hours
\$257.22	0.00
Last Year \$0.00	All Time 436.00

**Designations By Type (Internal vs. External)**

● External

● Internal

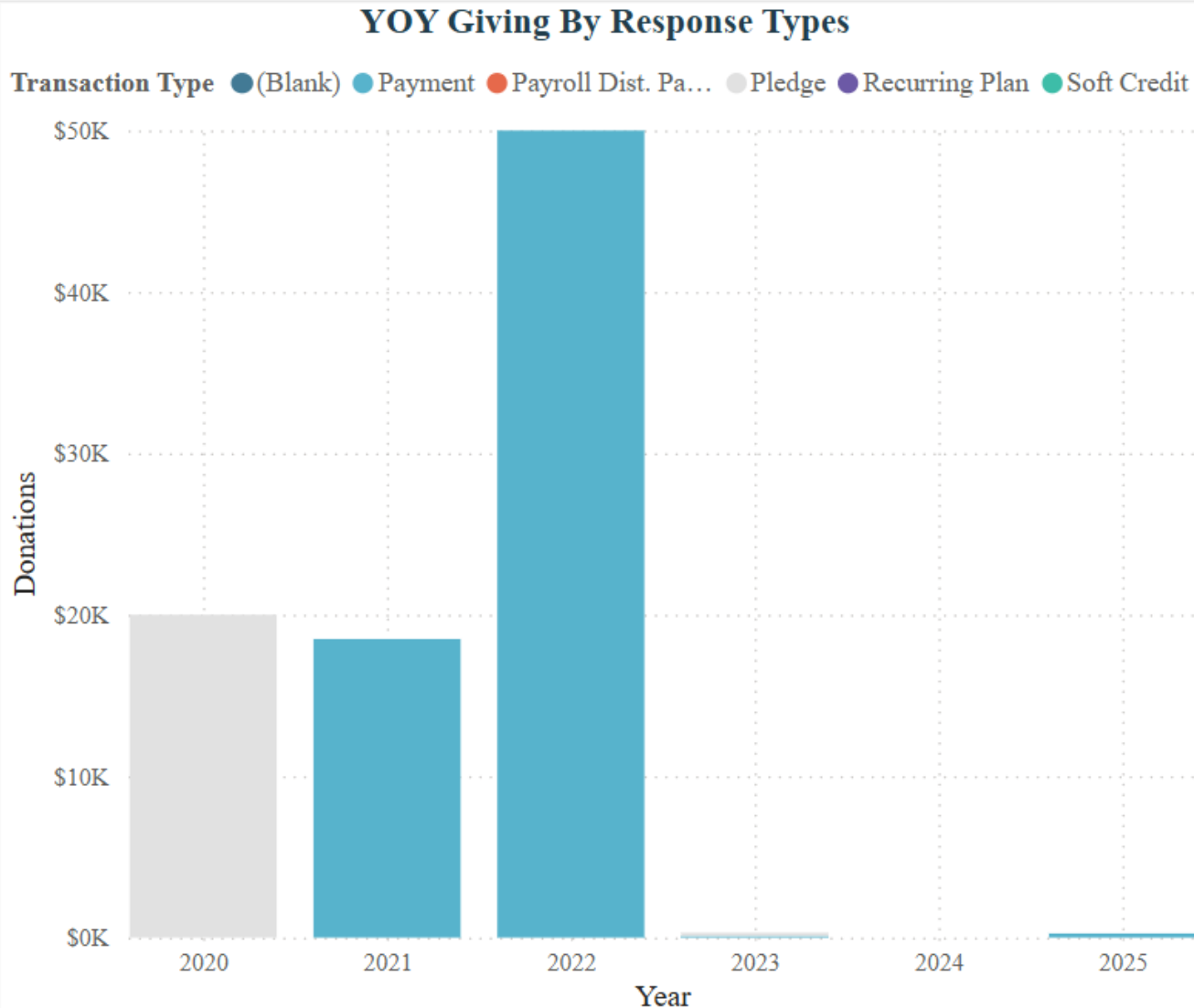


Type	Amount	Percentage
Internal	\$20,257	22.75%
External	\$68,800	77.25%

**YOY Giving By Response Types**

Transaction Type

● (Blank) ● Payment ● Payroll Dist. Pa... ● Pledge ● Recurring Plan ● Soft Credit



Year	Donations
2020	\$20,000
2021	\$18,000
2022	\$50,000
2023	\$1,000
2024	\$1,000
2025	\$1,000



# New CRM UI Options with PowerBI



Brian Billingham

Contact · SL Contact Demo

Brett Meyer  
Owner

bbham1@hotmail.com  
Email

+17573200348  
Mobile Phone

Yes  
Major Gift Prospect

Summary Opportunities **Influence** Participations and Analytics Engagement & Interests Recognitions Recurring Plans Details Related



## CONTACT INFLUENCE DASHBOARD

Date  
8/14/2009 12/31/2024

Brian Billingham

C0265440

bbham1@hotmail.com

OOA Workplace Giving Acco...

Karen Billingham

### Campaign Details

Campaign	Direct Giving	Raised & Soft Credit	Average Gift
⊕ Ongoing	\$11,176.00	\$55,376.25	\$2,235.20
⊕ 2024	\$1,185.00	\$61,686.72	\$131.67
⊕ 2023	\$18,107.22	\$10,780.00	\$1,646.11
⊕ 2022	\$57,363.00	\$285,904.00	\$9,560.50
⊕ 2021	\$8,402.00	\$21,670.00	\$700.17
⊕ 2020	\$56,649.72	\$103,616.35	\$2,360.41
⊕ 2019	\$10,086.46	\$125,619.85	\$916.95
⊕ 2018		\$1,335.00	
⊕ 2017			
<b>Total</b>	<b>\$424,305.40</b>	<b>\$2,305,444.92</b>	<b>\$3,626.54</b>

\$424,305.40 \$2,305,444.92 \$3,626.54 \$8,005.02  
Lifetime Direct Giving Raised Giving Average Direct Average Raised

### Transaction Count

405

### First Transaction

\$100.00 12/15/2011

### Last Transaction

\$100.00 12/12/2024

### Largest Transaction

\$200,000.00 04/21/2014

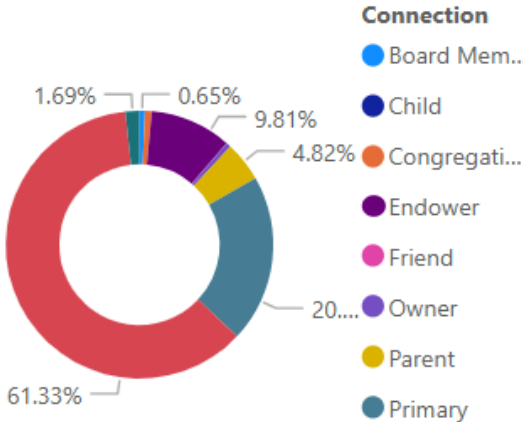
### Connected Givers

Donor	Connection	Total Giving	Average
Bank of America	Board Member	\$7,813.10	\$
Billingham Family Foundation	Endower	\$267,800.00	\$6
Brett Billingham	Parent	\$10.00	
Brett Meyer	Solicitor	\$1,363,381.24	\$
Chad Billingham	Child	\$5.00	
David Billingham	Parent	\$35,368.12	
Jack Billingham	Parent	\$10.00	
Jeffries Laboratories	Solicitor	\$61,500.00	\$3
Jonny Billingham	Parent	\$45.00	
Karen Billingham	Spouse/Partner	\$46,010.00	\$1
Katie Billingham	Parent	\$5.00	
<b>Total</b>		<b>\$2,176,189.92</b>	<b>\$7</b>

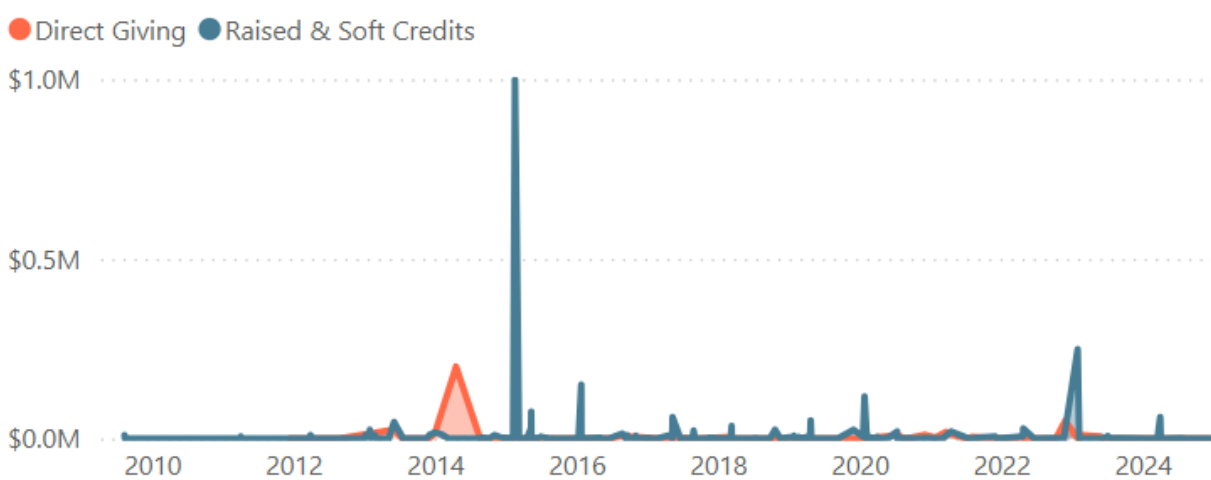
### Giving by Transaction Type

Gift	\$1.18M
Direct Pledge	\$1.17M
Pledge Fulfillment	\$0.18M
Soft Credit	\$0.14M
Payroll Deduct Pl...	\$0.05M
Third Party Pledge	\$0.00M
Order Fulfillment	\$0.00M
(Blank)	\$0.00M
Event Registration	\$0.00M
Credit Payment	\$0.00M


### Giving by Connection



### Giving Summary



# Ignite Constituents and Profiles



Home

StratusLIVE

Organization

Finance

Constituents

Profiles

Segments

Engagement Insights

Tags & Categories

Reports & Analytics

Content Management

Giving

Events


Volunteering

Communities

Partnerships

Integrations

Grants

 CONSTITUENTS > PROFILES

?

🔔

👤

DashboardGrid

Create

Profiles

Create, manage, and update constituent profiles on the Ignite platform.

🔍 Search

Use Natural Language

Cause Concepts

Communication Preferences

Participation

Filters:


send-newsletter

board-member

Clear all filters

Showing 22 constituents

Actions



Anthony Yost


Westberg, WY

Type: Individual

Email: Anthony.Yost@javier.org

Phone: +19809710232

Individual



Beatrice Tromp


Kuhlmanport, OK

Type: Individual

Email: Beatrice.Tromp@lelia.org

Phone: +15226536791

Individual



Ben Kertzmann


South Brionna, NC

Type: Individual

Email: Ben.Kertzmann@isabell.com

Phone: +11859070307

Individual



Cameron Toy


Alvenatown, DE

Type: Individual

Email: Cameron.Toy@vicky.com

Phone: +12833952641

Individual



Carl Altenwerth


Port Edwin, AK

Type: Individual

Email: Carl.Aldenwerth@bianka.net

Phone: +13481116113

Individual



Catherine Hegmann


Mitchellchester, WY

Type: Individual

Email: Catherine.Hegmann@adolphus.org

Phone: +16890746776

Individual



Duane Runolfsdottir


West Velvapor, DE

Type: Individual

Email: Duane.Runolfsdottir@walter.net

Phone: +18833870105

Individual



Elisa Ritchie


West Willis, CO

Type: Individual

Email: Elisa.Ritchie@milo.net

Phone: +12898868454

Individual



Jeremy Hyatt


East Rosie, WV

Type: Individual

Email: Jeremy.Hyatt@briana.org

Phone: +17972761478

Individual



John Funari


Chesapeake, VA

Type: Individual

Email: jgfunari@hotmail.com

Phone: +17573200749

Individual



Justin Corwin


Thompsonbury, GA

Type: Individual

Email: Justin.Corwin@rick.net

Phone: +11214136145

Individual



Kate Walsh

South Jayneport, CO

Type: Individual

Email: Kate.Walsh@percival.info

Phone: +14527802884

Individual

Previous

Next



# Ignite Constituents, Profiles, & AI Action Plans

Create, manage, and update constituent profiles on the Ignite platform.



**Sarah Gibbons**  
sarah.gibbons@test.com

Volunteer

Board Connection

Contact Now

Schedule Meeting

Edit Profile

AI Strategic Insights

Updated 2 hours ago

Relationship Summary

Sarah has been a consistent donor for 3 years with increasing engagement. Her most recent donation was **\$450** (January 12, 2025), which is consistent with her quarterly giving pattern. Her interests align strongly with your education programs and she has attended 2 of your last 3 events.

Engagement Score

87/100

Top 15% of your donor base

Giving Potential

\$5k-\$7.5k

3x current annual giving

Retention Risk

Very Low

97% retention probability

Contact Information

✎

✉ sarah.gibbons@test.com

☎ (555) 123-4567

📍 1234 Main Street  
Anytown, CA 90210

Preferred Contact Method

Email



AI-Recommended Engagement Strategy

Engagement Action Plan

Sarah shows high potential for increasing her giving commitment. Based on her engagement patterns and capacity analysis, a structured 6-month cultivation plan could lead to her reaching a new recognition level and joining a community group.

View 6-Month Plan

Assign Tasks

Community Group Opportunity

Sarah's volunteer history and interests could be a good fit for our Young Leaders group. Invite to the upcoming Young Leaders Community Group on June 15th.

Send VIP Invitation

Matching Gift Opportunity

Sarah works at ACME Corp, which offers a generous 1:1 matching-gift program up to \$10,000 (per our latest records). She hasn't taken advantage of it yet—should we send her a follow-up email highlighting the match?





# Financial Processing with Rapid, Excel-like Entry

Community Transformation Foundation

Home

StratusLIVE

Organization

Content Management

Giving

Events

Volunteering

Communities

Partnerships

Finance

Financial Management

Fiscal Years

Give at Work

Integrations

FINANCE > FINANCIAL MANAGEMENT > BATCH #3

Financial Management - Rapid Entry

Upload large number of transactions through CSV upload or manual entry

Download CSV Template

Import CSV

AI Assisted

TRANSACTION SUMMARY

Estimated Total Count \*  
8

Estimated Total Amount \*  
\$16,000

Accounting Date \*  
03/04/2025

Transaction Type  
Payment

Payment Method  
Check

Payment Type  
Gift

Designation \*  
Pets for Vets

Campaign  
Paws for Purpose

Campaign Activity

Campaign Activity Group

Select Template

Save as Template

#	CONSTITUENT NAME	CHECK DATE	CHECK NUMBER	AMOUNT	
1	Julie Andrews	02/28/2025	#2304	2000	
2	Micheal Kelly	02/13/2025	#2234	2000	
3	John Stennis	02/23/2025	#345	2000	
4	Monica Sterling	02/03/2025	#45	2000	
5	Sterling Somers	02/04/2025	#567	2000	
6	Haley Henderson	02/05/2025	#78	2000	
7	Bryce Button	02/10/2025	#990	2000	
8	Summer Ansley	02/18/2025	#91	2000	

Add Entry

ACTUAL COUNT: 8 | ACTUAL TOTAL: \$16,000.00

Cancel

Save

Process Transactions

# Financial Processing with AI Assistant

AI Assisted Transaction Processing



TRANSACTION SUMMARY

Estimated Total Count \*

8

Estimated Total Amount \*

\$16,000

Accounting Date \*

03/04/2025

Transaction Type

Payment

Payment Method

Check

Payment Type

Gift

Designation \*

Pets for Vets

Campaign

Paws for Purpose

Campaign Activity

Campaign Activity Group

Select Template Save as Template

#	CONSTITUENT NAME	CHECK DATE	CHECK NUMBER	AMOUNT		
1	Julie Andrews	02/28/2025	#2304	2000	^	🗑
2	Micheal Kelly	02/13/2025	#2234	2000	^	🗑
4	Monica Sterling	02/03/2025	#45	2000	^	🗑
3	John Stennis	02/23/2025	#345	2000	^	🗑
5	Sterling Somers	02/04/2025	#567	2000	^	🗑
6	Haley Henderson	02/05/2025	#78	2000	^	🗑
7	Bryce Button	02/10/2025	#990	2000	^	🗑
8	Summer Ansley	02/18/2025	#91	2000	^	🗑
8	Summer Ansley	02/18/2025	#91	2000	^	🗑
ACTUAL COUNT: 8   ACTUAL TOTAL: \$16,000.00						

TRANSACTION BOT

Hello! Please let me know what kind of transactions you would like to process?

I have 7 transactions to enter from the Spring Pledge Drive. They are all check donations and designated for the Community Park Charity.

Great! I can create a batch template for this. Here's what I've gathered so far:

- Batch Type: Donation
- Estimated Transactions: 7
- Template Name: Spring Pledge Drive
- Campaign: Spring Pledge Drive
- Designation (Fund): Community Park Charity
- Payment Method: Check


Type your message...



Attach

Back Save

# Financial Processing with Batch Templates



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FINANCE > FINANCIAL MANAGEMENT > TEMPLATE BUILDER

?

🔔

👤

Template Builder

Create templates to pre-populate form fields

BATCH CONFIGURATION

☐ Transaction Type

☒ Payment Method

☒ Payment Type

☒ Payment Designation Type

CONSTITUENT INFORMATION

☐ Paying Party

☐ Opportunity

☐ Anonymity

FUND ALLOCATION

☒ Designations

CAMPAIGN INFORMATION

☒ Campaign

☐ Campaign Activity

☐ Campaign Activity Group

Template

Template Name

Gift - Check - Paws for Purpose

Description

Template to support all Payment that are gifts paid with check for the Paws for Purpose Campaign

Premiums☐

Tributes☐

Soft Credits☐

Solicitors☐

Campaign

Paws for Purpose

Designation

Pets for Vets

Payment Type

Payment

Payment Method

Check

Payment Designation Type

Gift

Cancel

Save



# Ignite Give at Work Pro



Elevate community. Unite purpose.  
Make impact.

Find and support nonprofits that align with your values.  
Your company will match donations to eligible organizations!



### Nourish Together

Nourish Together is a community of people who provide wholesome goods to those experiencing food insecurity. We thrive together.

\$750,000

### Our Collective Impact



\$1.2 M

Total donations this year



230+

Nonprofit partners

Employee

### Your Giving Basket

	Nourish Neighbors Foundation Food Delivery	\$ 50	
	Harvest for Hope Agriculture	\$ 100	
	The Bright Bite Project Education	\$ 50	

Total Donation: \$200.00

Proceed to Payment



# Ignite Give at Work Pro



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[Back to campaign](#)

## My Giving Basket

### Payment Method

Credit card

Donations are charged to your card immediately or on a recurring basis, depending on your selection.

Payroll deduction

Your gift will be deducted from each paycheck every two weeks beginning in May.

### Employee Information

First Name

Alex

Last Name

Carter

Email Address

alex.carter@treasuredgrocery.com

Phone Number

757-740-2293

### Amount per Pay Period:

Nourish Neighbors Foundation

Food Delivery

\$ 50

Harvest for Hope

Agriculture

\$ 100

The Bright Bite Project

Education

\$ 50

Estimated Annualized Amount:  
\$200 per pay period x 26 pay periods


\$5,200.00

Amount per Pay Period

\$200.00

Confirm Donation

# Ignite Give at Work Pro Admin Setup – AI Enabled



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Nourish Together


View and manage campaigns

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Open Page Designer



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Elevate community. Unite purpose.  
Make impact.

Find and support nonprofits that align with your values.  
Your company will match donations to eligible organizations!

Nourish Together

Nourish Together is a community-powered campaign committed to ending hunger at home. We provide wholesome groceries, fresh produce, and easy-to-make meal kits to families experiencing food insecurity—ensuring every household has the nourishment they need to thrive together.

\$750,000

\$1,000,000

Cancel

Save

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HOME CAMPAIGNS > CREATE



## Create Campaign

Edit and manage campaigns

Details Page Content Designations

Info Payment Settings Configuration

### Payment Methods

☒ Payroll ☒ Credit Card

#### Payroll

Description (optional) ?

Your gift will be deducted from each paycheck every two weeks beginning in May.

#### Pay Period

☐ 12 - Monthly ☐ 24 - Semi-monthly ☒ 26 - Biweekly ☐ 52 - Weekly

#### Credit Card

Description (optional) ?

Donations are charged to your card immediately or on a recurring basis, depending on your selection.

Cancel

Save

# Wrapping it Up...



- **Communicate with us in the Monthly Business Review**
- **Participate with us in Upcoming Trials**
- **Remember, AI is a Force Multiplier!**
- **Enjoy the Conference!**

**THANK YOU**  
**FOR YOUR TIME!**



## **Stay In Touch**

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