POND / AI IN TRAINING

Fundraising — 24 Prompts

the full prompt library for research, asks, stewardship, campaigns, reporting, and board fundraising support

24 copy-paste prompts · 6 chapters · development staff running the full fundraising cycle, from prospect research to year-end reporting

A FIELD GUIDE, NOT A BINDER

Choose the prompt that fits what you're doing right now. Nothing here requires reading start to finish.

WELCOME

What this pack helps you build

the full prompt library for research, asks, stewardship, campaigns, reporting, and board fundraising support

THE HUMAN BOUNDARY

AI may help draft, summarize, organize, and create first-pass materials. A responsible human confirms facts, context, permissions, tone, and final decisions. This pack does not cover: inventing impact numbers or donor figures; sending AI-generated donor or board messages without review; making governance or personnel decisions with AI.

CHAPTER 1 OF 6

Donor & Prospect Research

Good fundraising starts with knowing who to approach and why. This chapter is about organizing public, appropriate research — never inventing wealth or affinity signals you can't confirm.

In this chapter

Prospect Research Brief Builder

PURPOSE

Turns public information about a prospect into an organized research brief.

WHEN TO USE IT

Use before a first cultivation conversation with a new prospect.

> Organize this public information about a prospect into a research brief: [paste public info/notes]. Structure: background, known affiliations, possible connection to our mission, suggested first conversation topics. Do not infer wealth or invent anything not in the source material.

PRO TIPS

- Only use publicly available or donor-disclosed information — nothing scraped or assumed.
- Mark every unconfirmed detail clearly as unconfirmed.

EXAMPLE OUTPUT

An organized prospect research brief.

What's next → Use Funder Priorities Matcher if the prospect represents an institution.

Wealth/Affinity Signal Organizer

PURPOSE

Organizes already-known, appropriate signals about a prospect's giving capacity and interests.

WHEN TO USE IT

Use only with information your organization already legitimately has.

> Organize these known signals about a prospect: [paste known giving history, stated interests, public affiliations]. Summarize what they suggest about capacity and interest area, without assigning a specific dollar capacity number we can't verify.

PRO TIPS

- Never output a specific 'wealth capacity' dollar figure — that requires verified data you likely don't have.
- Use this to inform tone and approach, not to set a specific ask amount alone.

EXAMPLE OUTPUT

An organized signal summary without invented capacity figures.

What's next → Feed into Major Gift Ask Script Builder for the conversation.

CHAPTER 1 · PROMPT 03

Funder Priorities Matcher

PURPOSE

Matches your program against a funder's publicly stated priorities.

WHEN TO USE IT

Use when researching institutional funders (foundations, corporate giving programs).

> Compare our program — [paste description] — against this funder's publicly stated priorities: [paste funder info]. Note genuine areas of overlap and any real gaps. Do not stretch our program's description to manufacture fit.

PRO TIPS

- A genuine gap is useful information, not a failure — it means look elsewhere.
- Verify funder priorities against their current published guidelines, not old notes.

EXAMPLE OUTPUT

An honest fit comparison.

What's next → Use Letter of Inquiry Drafter for funders with strong fit.

CHAPTER 1 · PROMPT 04

Warm Introduction Path Finder

PURPOSE

Identifies which of your existing contacts might offer a warm introduction to a prospect.

WHEN TO USE IT

Use before a cold outreach attempt.

> Given this prospect: [name/organization] and this list of our board/staff/existing donor network: [paste list], suggest who might realistically offer a warm introduction, based only on documented connections, not guesses.

PRO TIPS

- Only suggest connections you can actually document — don't guess at LinkedIn-style links.
- Always ask the connector's permission before using their name.

EXAMPLE OUTPUT

A shortlist of possible warm-introduction paths.

What's next → Coordinate the ask with whoever holds the relationship.

CHAPTER 2 OF 6

Asks & Proposals

The ask is where research turns into a real conversation or document. This chapter covers building that ask — scripts, letters, and proposals — grounded in what's actually true about your program.

In this chapter

Major Gift Ask Script Builder

PURPOSE

Builds a conversational script for a major gift ask.

WHEN TO USE IT

Use before an in-person or phone major gift conversation.

> Build a conversational script for a major gift ask to [donor/prospect], for [program/campaign], targeting [amount or range]. Include an opening, the case for support, the specific ask, and how to handle a 'let me think about it' response.

PRO TIPS

- Practice the script out loud — written asks and spoken asks read very differently.
- Never present a specific dollar figure as their 'expected' gift without basis.

EXAMPLE OUTPUT

A full conversational ask script.

What's next → Pair with Major Donor Briefing Sheet from the Stewardship pack.

Letter of Inquiry Drafter

PURPOSE

Drafts a letter of inquiry to a foundation funder.

WHEN TO USE IT

Use when a funder requires an LOI before a full proposal.

> Draft a letter of inquiry for [funder] about [program], using only these confirmed facts: [paste program facts/data]. Follow this structure if given: [paste funder's required format, or use a standard LOI structure if none given].

PRO TIPS

- Match the funder's exact format and word count if they specify one.
- Have the program lead confirm every fact before submission.

EXAMPLE OUTPUT

A draft letter of inquiry.

What's next → Use Case for Support One-Pager to build supporting material.

Sponsorship Proposal Builder

PURPOSE

Builds a sponsorship proposal for an event or program, with tiered benefits.

WHEN TO USE IT

Use when seeking corporate or business sponsors for an event or initiative.

> Build a sponsorship proposal for [event/program], with these tiers: [list tiers/amounts]. For each tier, list specific, deliverable benefits (logo placement, mentions, tickets) — do not promise anything the team hasn't confirmed it can deliver.

PRO TIPS

- Only promise benefits your team can actually execute — overpromising damages the relationship.
- Keep tiers simple; too many options slows down a sponsor's decision.

EXAMPLE OUTPUT

A tiered sponsorship proposal.

What's next → Use Event Sponsorship Deck Outline to build the full pitch deck.

Peer-to-Peer Fundraising Pitch Kit

PURPOSE

Builds a kit of messaging peer fundraisers can use to ask their own networks.

WHEN TO USE IT

Use when launching a peer-to-peer or team fundraising campaign.

> Build a peer-to-peer fundraising pitch kit for [campaign], including: a sample personal ask message, a short social post, and 3 tips for fundraisers on making it personal. Keep the sample easy to personalize, not a rigid script.

PRO TIPS

- Emphasize personalization — copy-pasted appeals from every fundraiser underperform.
- Give fundraisers a real number or story to reference, not vague mission language.

EXAMPLE OUTPUT

A peer fundraiser starter kit.

What's next → Track which messaging variants perform best for next campaign.

CHAPTER 3 OF 6

Stewardship & Retention

Keeping a donor is cheaper than finding a new one. This chapter covers the ongoing relationship work — segmentation, upgrades, and the thank-you that actually lands.

In this chapter

Thank-You Note Personalizer

PURPOSE

Personalizes a thank-you note using specific gift and donor details.

WHEN TO USE IT

Use for every gift.

> Personalize this thank-you note using: [paste donor name, gift details, program designation]. Reference the specific program. No generic form-letter language.

PRO TIPS

- Send within 48 hours.
- Vary language across notes so repeat donors don't get identical text twice.

EXAMPLE OUTPUT

A personalized thank-you note.

What's next → Log into the donor's stewardship record.

CHAPTER 3 · PROMPT 10

Stewardship Touchpoint Planner

PURPOSE

Plans the next 3 touchpoints for a specific donor based on their giving level and history.

WHEN TO USE IT

Use when onboarding a new donor into your stewardship system.

> Plan the next 3 stewardship touchpoints for this donor: [paste giving history/tier]. Specify type (call, update, invite) and rough timing for each, appropriate to their giving level.

PRO TIPS

- Match touchpoint intensity to gift size — don't over- or under-invest.
- Assign a named owner to each touchpoint, not just a date.

EXAMPLE OUTPUT

A 3-touchpoint stewardship plan for one donor.

What's next → Feed into your broader Stewardship Cadence Builder.

Donor Segmentation Helper

PURPOSE

Segments a donor list into meaningful groups for targeted communication.

WHEN TO USE IT

Use when planning a campaign or communication that shouldn't go to everyone the same way.

> Segment this donor list into meaningful groups for communication purposes: [paste list with giving history]. Suggest segments (e.g. first-time, lapsed, recurring, major) and what each segment likely needs to hear.

PRO TIPS

- Keep segments actionable — a segment nobody will message differently isn't useful.
- Revisit segments each campaign; donor behavior shifts.

EXAMPLE OUTPUT

A segmented donor list with messaging notes per segment.

What's next → Use segments to target the Lapsed Donor Re-Engagement or Recurring Giving Upgrade Ask.

Recurring Giving Upgrade Ask

PURPOSE

Drafts an ask for a recurring donor to increase their monthly gift.

WHEN TO USE IT

Use with recurring donors who've given consistently for 6+ months.

> Draft an upgrade ask for a recurring donor giving $[amount]/month for [X months], asking them to consider increasing to $[new amount]/month. Explain concretely what the increase would fund, without inventing specifics we haven't confirmed.

PRO TIPS

- Suggest a specific, modest increase — a big jump ask often backfires.
- Thank them for their consistency first, before making the ask.

EXAMPLE OUTPUT

A recurring-gift upgrade ask.

What's next → Track response rate to calibrate future upgrade asks.

CHAPTER 4 OF 6

Events & Campaigns

Campaigns and events concentrate a lot of fundraising work into a short window. This chapter covers the messaging and materials that keep a campaign coherent under time pressure.

In this chapter

CHAPTER 4 · PROMPT 13

Campaign Theme & Messaging Builder

PURPOSE

Builds a consistent theme and core messaging for a fundraising campaign.

WHEN TO USE IT

Use at the start of planning any named campaign.

> Build a theme and core messaging for a fundraising campaign supporting [goal/program], with a target of [amount] by [date]. Include a tagline, a 2-sentence elevator pitch, and 3 key messages to stay consistent across channels.

PRO TIPS

- Keep messaging consistent across every channel — mixed messages dilute a campaign.
- Test the tagline with a few people before locking it in.

EXAMPLE OUTPUT

A campaign theme and core messaging kit.

What's next → Use Giving Day Content Calendar to plan the rollout.

Event Sponsorship Deck Outline

PURPOSE

Outlines a sponsorship pitch deck for an event.

WHEN TO USE IT

Use when preparing to pitch potential event sponsors.

> Outline a sponsorship pitch deck for [event]. Slides should cover: the event and audience, sponsorship tiers and benefits, past event results (only if we have real confirmed numbers), and next steps. Flag where we need real data to fill a slide.

PRO TIPS

- Never fill a 'past results' slide with invented numbers — leave it blank or cut it if new.
- Keep the deck to 8-10 slides; sponsors skim.

EXAMPLE OUTPUT

A sponsorship deck outline with data gaps flagged.

What's next → Pair with the Sponsorship Proposal Builder for the written follow-up.

Giving Day Content Calendar

PURPOSE

Builds a content calendar for a giving day or short fundraising campaign.

WHEN TO USE IT

Use 2-3 weeks before a giving day or short campaign window.

> Build a content calendar for a [X]-day giving campaign, covering email, social, and any other channels we use: [list channels]. Include timing, channel, and a one-line content idea per post — full copy to be drafted closer to send date.

PRO TIPS

- Front-load awareness content, save urgency messaging for the final 48 hours.
- Build in a thank-you/results post for right after the campaign ends.

EXAMPLE OUTPUT

A day-by-day content calendar for the campaign window.

What's next → Draft individual posts from the calendar as send dates approach.

Auction/Raffle Item Solicitation Letter

PURPOSE

Drafts a solicitation letter requesting donated items for an auction or raffle.

WHEN TO USE IT

Use when soliciting in-kind items from local businesses for an event.

> Draft a solicitation letter requesting a donated item or gift certificate for our [event] auction/raffle, from [type of business, e.g. local restaurants]. Explain the event briefly, what recognition they'll receive, and how to donate.

PRO TIPS

- Make the ask easy to say yes to — specify exactly what you're requesting.
- Follow up with a thank-you and the in-kind gift receipt they need for their records.

EXAMPLE OUTPUT

A solicitation letter for in-kind auction/raffle items.

What's next → Log accepted donations for the In-Kind Gifts tracking process.

CHAPTER 5 OF 6

Reporting & Compliance

Fundraising success is only real once it's tracked and reported honestly — to donors, the board, and your own team. This chapter covers the paperwork side without losing the plot.

In this chapter

Gift Acknowledgment Checklist Drafter

PURPOSE

Drafts a checklist of what a gift acknowledgment letter needs to include.

WHEN TO USE IT

Use once to set your standard, then reuse for every acknowledgment letter going forward.

> Draft a checklist of what our gift acknowledgment letters should always include for compliance and donor relations purposes, for gifts of [describe: cash, in-kind, stock, etc.]. Note where official tax-receipt language must come from an accountant, not this draft.

PRO TIPS

- Have your accountant sign off on the official tax-language portion once, then reuse it.
- Different gift types (in-kind vs. cash) often need different required language.

EXAMPLE OUTPUT

A standing acknowledgment-letter checklist.

What's next → Apply to every Thank-You Note Personalizer output.

Fundraising Report for Board

PURPOSE

Turns fundraising data into a board-ready summary report.

WHEN TO USE IT

Use ahead of any board meeting where fundraising is reported.

> Turn this fundraising data into a board report: [paste data — gifts, campaign results, pipeline status]. Include progress against goal, key wins, and any risk to flag. Use only the numbers given.

PRO TIPS

- Include pipeline (not-yet-closed) status, not just closed gifts — boards want the full picture.
- Flag risk honestly; a board caught by surprise later trusts leadership less.

EXAMPLE OUTPUT

A board-ready fundraising report.

What's next → Pair with the Board Brief Builder for the full packet.

Grant-to-Fundraising Crosswalk

PURPOSE

Checks that grant-restricted funds aren't double-counted in general fundraising totals.

WHEN TO USE IT

Use when preparing any report that combines grant and general fundraising totals.

> Cross-check these grant awards and general fundraising totals for double-counting: [paste both lists]. Flag any gift or grant that might be counted in both totals, and note how to correct it.

PRO TIPS

- This kind of double-counting is a common, honest mistake — worth checking every reporting cycle.
- Have finance confirm the correction before the report goes out.

EXAMPLE OUTPUT

A flagged list of potential double-counted amounts.

What's next → Correct totals before finalizing the Fundraising Report for Board.

Donor Privacy & Data Use Note Drafter

PURPOSE

Drafts a plain-language note explaining how donor data is used and protected.

WHEN TO USE IT

Use once to create a standing donor-facing privacy note, and revisit yearly.

> Draft a plain-language donor privacy and data use note, covering: what donor information we collect, how it's used, whether it's ever shared (and with whom, if so), and how a donor can ask to be removed from communications.

PRO TIPS

- Have legal counsel review this once before publishing.
- Keep it genuinely plain-language — this isn't the place for legal jargon.

EXAMPLE OUTPUT

A donor-facing privacy and data use note.

What's next → Link it from every donation confirmation and thank-you communication.

CHAPTER 6 OF 6

Board & Leadership Fundraising Support

Board members and executive leadership are often expected to fundraise without much support. This chapter gives them the tools to do it with confidence, not just a request to 'make some calls.'

In this chapter

Board Ask Talking Points

PURPOSE

Builds simple talking points board members can use when asking their own networks.

WHEN TO USE IT

Use when equipping the board for a fundraising campaign or annual ask.

> Build simple, confident talking points a board member can use to ask someone in their network to give to [campaign/program]. Keep it conversational, not a script they'd read verbatim, and include how to handle a 'no' gracefully.

PRO TIPS

- Board members fundraise better with a few confident lines than a long script.
- Include a line for handling 'no' gracefully — that fear stops many board members from asking at all.

EXAMPLE OUTPUT

A simple board-member talking points sheet.

What's next → Pair with the Executive Director Cultivation Call Prep for joint asks.

Executive Director Cultivation Call Prep

PURPOSE

Preps the executive director for a cultivation call with a specific prospect.

WHEN TO USE IT

Use before any ED-level donor cultivation call.

> Prep the executive director for a cultivation call with [prospect], covering: background on the prospect (only confirmed info), the goal of this specific call, and 2-3 open-ended questions to learn what they care about.

PRO TIPS

- Cultivation calls should ask more than they tell — build in real listening questions.
- Debrief immediately after the call while details are fresh.

EXAMPLE OUTPUT

A cultivation call prep sheet.

What's next → Log the debrief into the donor's relationship record.

Fundraising Goal-Setting Worksheet Prompt

PURPOSE

Builds a worksheet to set a realistic annual fundraising goal from historical data.

WHEN TO USE IT

Use during annual budget/planning season.

> Build a fundraising goal-setting worksheet using this historical data: [paste past years' totals by source]. Include a realistic growth range, broken down by source (individual, grants, events, corporate), and flag any source that looks over-relied-upon.

PRO TIPS

- A goal without a source breakdown is hard to plan against — always break it down.
- Flag over-reliance on one source; that's a real organizational risk worth board attention.

EXAMPLE OUTPUT

A source-broken-down fundraising goal worksheet.

What's next → Bring the worksheet to the board for the Fundraising Report.

Case for Support One-Pager

PURPOSE

Builds a one-page case for support usable across the whole fundraising cycle.

WHEN TO USE IT

Use once to build a reusable core document, then adapt it per audience or ask.

> Build a one-page case for support for [program/organization], using only these confirmed facts: [paste facts]. Cover: the need, our approach, what makes us the right organization to address it, and the specific ask. Keep it to one page.

PRO TIPS

- This should be your most reused document — keep it current as facts change.
- Have the executive director sign off since it represents the whole organization.

EXAMPLE OUTPUT

A one-page, reusable case for support.

What's next → Adapt for specific asks with the Multi-Audience Report Adapter.

WHEN YOU REACH THE LAST PAGE

You have a working system

☐ recognize where this applies to our own work

☐ choose the prompt that fits the task at hand

☐ confirm facts and figures before anything goes out

☐ get the right human review before sending or publishing

☐ decide what to reuse as a standing part of our workflow

Keep the human accountable. Let the prompts make the work repeatable.