

Fundraising 2.0: AI for Good

A practical guide for Chief Development Officers and nonprofit business & technology leaders.

Better
fundraising starts
with better
predictions...

Squark|AI



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Better fundraising starts with better predictions.

Executive brief (for CDOs & VPs)

- Outcomes: lift net revenue, reduce CAC/CPDR, stabilize cash flow.
- Method: donor-level predictions + AI agents that activate next-best actions in your stack.
- Speed-to-value: launch in days; first lift in the next campaign window.
- Governance: human-in-the-loop approvals, decision logs, bias monitoring, least-privilege access.

What you'll learn in this guide

When and where AI delivers ROI in development, how to stand up responsible automation, and how to plan people, process, and technology for scale.

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1) Why now: from guesswork to certainty

Targets are rising while headcount and budgets are flat. Donors expect relevance and respect across every channel. Calendar-first planning and coarse segments can't keep pace with real donor behavior. Squark turns your data into donor-level predictions and plain-language next-best actions—so your team focuses on the right people, with the right ask, at the right moment.

Shifts leaders are making

- Predictions over personas: individual-level likelihoods and values, not generic clusters.
- Actions over insights: recommended ask/channel/package feed your CRM, ESP, print, and ad tools.
- Confidence over hope: forecasts tie to cash flow, capacity planning, and program pacing.

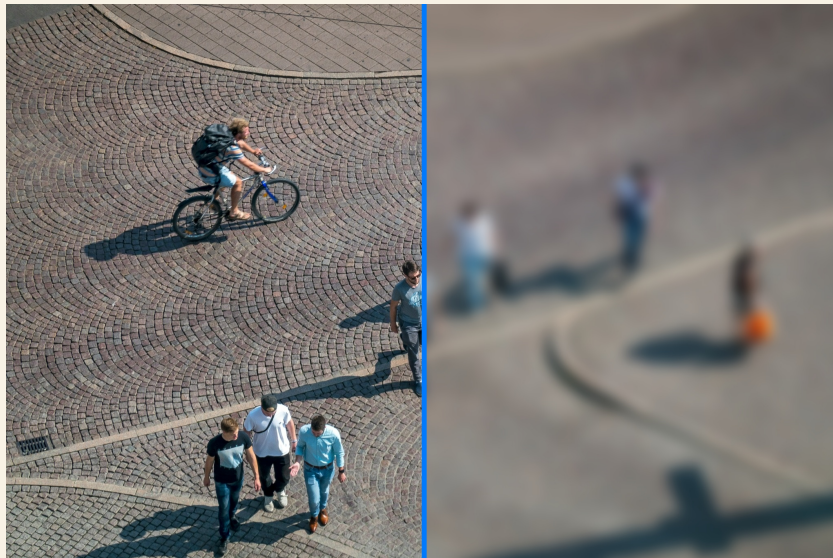


2) What Squark does

Squark builds and deploys classification (responders, upgrades, reactivations, churn), regression (gift value, ask amount), and time-series (appeal volume, weekly revenue) models on your first-party data. You get donor-level scores and drivers, plus recommended treatments—then AI agents push those decisions into the tools you already use.

What leaders can bank on

Directional outcomes we've seen: net-revenue gains up to +20%, acquisition-cost reductions up to -50%, and stronger forecasting confidence at package/campaign/program levels. (Your results depend on data quality, offer, channel mix, and scale.)



3) Proven nonprofit use cases

A. Audience & offer optimization (mail + digital)

- Rank donors and prospects by response and expected net revenue.
- Choose package/premium/cadence/channel mix by segment.
- Set print volumes and digital budgets to confidence intervals.

B. Premium & package selection (direct mail)

- Predict response by premium/kit to guide creative and costs.
- Balance lift against premium, postage, and production spend.

C. Next-best ask, channel, and moment

- Ask ladders, payment type, and channel by donor likelihood and value.
- Trigger journeys on behavioral and seasonal signals.

D. Reactivation, churn, and upgrade

- Identify lapsing donors early; prioritize save offers and cadence resets.
- Surface mid-level and major upgrade candidates with context.

E. Major gift & mid-level prospecting

- Score capacity, affinity, and timing from your first-party signals.
- Generate call sheets and next steps for fundraisers.

F. Time-series forecasting (appeals, cash flow, capacity)

- Forecast response/gifts weekly; plan cash flow and staffing.
- Pre-order materials; reduce rush fees and stockouts.

G. Creative acceleration with guardrails

- On-brand letter/email/SMS/ad variants from model insights.
- Auto-generate A/B matrices tied to hypotheses and KPIs.

H. Data health & compliance automation

- Flag anomalies, missing fields, and outlier costs before production.

- Log predictions, approvals, and content for audit.



4) How it works

Connect → Train → Activate → Learn. Securely connect gift history, campaigns/appeals, costs, and channel touches. Squark trains models with automated validation, outputs scores and drivers, and uses AI agents to activate actions in your CRM/ESP/print/ad stack. Closed-loop measurement updates models and playbooks.

5) Implementation & governance

Launch blueprint

- Weeks 0–2: Data readiness (IDs, dates, campaign tables, package costs, touches).
- Weeks 2–6: Model library: response, upgrade, gift value, reactivation, churn, ask amount, week-ahead revenue.
- Weeks 4–8: Orchestration: connect CRM/ESP/print/ad tools; define human-in-the-loop checkpoints; SLA + rollback plans.

Responsible AI

- Human approval for high-impact actions; least-privilege access.
- Bias/fairness monitoring; data minimization and expirations.
- Versioned models/prompts; immutable decision logs.

6) What it takes (people + data)

- People: an executive sponsor (CDO), a program owner, marketing ops, and IT/analytics contact.
- Data: donor master, gift history, campaign/appeal tables, package costs, channel interactions; optional enrichment.
- Access: SFTP/API/cloud DWH; read-only access to activation tools where needed.

ROI framing

- Net revenue = revenue – costs. Model levers: response rate, average gift, channel mix, premium usage, volume.

- CPDR (cost per dollar raised) and Payback (months): track by campaign/program; use calibrated forecasts to plan cash.
- Capacity: match call-center/production capacity to predicted volume; avoid rush fees and idle time.

7) Proof & measurement

- KPIs: net revenue, CPDR, response rate, average gift, reactivation rate, upgrade rate, sustainer churn, time-to-first gift.
- Testing: randomized holdouts; pre-registered plans; report lift with confidence intervals.
- Explainability: top drivers and calibration so teams can explain the “why,” not just the “what.”

Next steps

Pick a starting use case—upgrade, reactivation, or sustainer growth. We'll scope data and launch in days, not months. See lift in your first campaign window—and scale.

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