



The "Is it Safe?" Checklist for Legacy Fundraisers

Before hitting 'Enter' on that prompt, run these 5 checks

1. The PII Purge (Personal Identifiable Information)

- Check: Have I removed all real names, addresses, phone numbers, and email addresses from the text I am pasting?
- Rule: Treat free AI tools like a public bulletin board. If you wouldn't pin the data on a notice board in the street, don't put it in the AI.
- Tip: Use placeholders like [Donor Name] or [Charity Region].

2. The Hallucination Check

- Check: Am I asking the AI for facts, stats, or citations?
- Rule: LLMs are a creative writer, not a search engine. It can and will invent convincing lies (hallucinations).
- Tip: Always cross-reference generated statistics with your own internal reports or trusted sources.

3. The Bias Scan

- Check: Does the output assume a specific gender, demographic, or cultural norm that doesn't fit your beneficiaries?
- Rule: AI models are trained on internet data, which contains inherent biases.
- Tip: Specifically prompt for inclusivity. Example: "Ensure the tone is inclusive and avoids gendered language."

4. The "Human in the Loop"

- Check: Do I intend to copy-paste this directly into an email or website?
- Rule: AI is the drafter; you are the editor. Never publish raw AI output without a human review.
- Tip: Read the output aloud. If it sounds robotic or uses words like "delve," "landscape," or "testament," rewrite it.

5. The Copyright Clarity

- Check: Am I asking it to create an image or logo?
- Rule: Current laws on AI copyright are fuzzy. Avoid using AI for definitive brand assets (like logos) that you need to own legally.
- Tip: Use AI for inspiration rather than the final product. If you do use an AI-generated image, always disclose it to maintain transparency with your donors.



The Prompt Cheat Sheet for Legacy Fundraisers:

Use these starter prompts to save time, and stretch your budget

1. The "Legacy Prospect" Test - Use this to ensure your legacy messaging resonates with a specific demographic.

- The Prompt: "Act as a [Age, e.g., 72] year old long-term supporter of [Charity Name]. You are currently reviewing your will. You care deeply about [Cause], but you are protective of your family's inheritance and wary of being 'sold to.' I am going to paste a draft legacy appeal below. Please critique it. Tell me: Does this feel like a meaningful invitation to join a mission, or does it feel like a cold request for your assets? Highlight any phrases that feel too pushy or insincere."

2. The "Legacy Case for Support" Cure - Use this when you need to articulate why a donor should choose your charity.

- The Prompt: "I am drafting a 'Case for Support' for our Legacy program. I need to answer the question: 'Why should a donor trust us with a gift in their will over any other charity?' Here are our raw notes on our 10-year strategy and history: [Paste bullet points]. Please draft three versions of this answer.
 - Version 1: Focuses on stewardship and financial stability (The 'Safe Pair of Hands').
 - Version 2: Focuses on the emotional journey and the 'world we leave behind.'
 - Version 3: A short, powerful 'Pledge' style statement for a legacy brochure."

3. The "Legacy Campaign Stress-Tester" - Use this to move from a general message to a strategic legacy campaign.

- The Prompt: "Act as a panel of Legacy Fundraising Consultants. I have an idea for a legacy awareness campaign: [Describe your idea]. Please evaluate it based on these criteria:
 - Does this bridge the gap between 'current donor' and 'legacy pledger'?
 - What are 3 psychological barriers that might stop someone from clicking 'Request a Legacy Pack' based on this idea?
 - Suggest 3 ways to promote this campaign specifically to our existing 'In Memory' donors with the utmost sensitivity."



The Quick Reference Playbook

Start experimenting and see what these AI tools can do for your cause

Charity AI Toolbox (developed by Steve Law)

A free experimental resource to help people working in charities get more done and faster, this toolbox is a collection of pre-built prompts and tips to help you navigate, adopt and implement AI effectively.

AI Notebooks

An AI-powered research assistant, that uses your documents to provide grounded summaries, answer questions, and generate insights based solely on the data that you provide.

Dataro

A predictive modelling platform that analyses CRM data to identify which donors are most likely to give, churn, or upgrade their support to help target your campaigns more efficiently.

Custom Agents

Personalised versions of AI (like Gemini's Gems or ChatGPT's Custom GPTs) that you can train with specific instructions, or to act in a specific way as a specialised expert.