



# FROM PROMISE TO PRACTICE – AI’S ROLE IN MODERN PHILANTHROPY

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# INTRODUCTIONS



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# COMMON USES OF (GENERATIVE) AI TOOLS



- **A better web search engine** – Use Copilot / chatGPT / B|Chat the same way you would use Google. Ask a question, get an answer.



- **Reading Assistant** – Summarize a PDF, long text, PPTx, chat with a document, etc.



- **Writing Assistant** – Draft anything (e.g., email, client letter), clean up blob of text, summarize into bullet points, go from bullet points to paragraph, etc.



- **Work Starter / Doer** – Give me a starting point structure or report for anything (e.g., contract, NDA, sales strategy, AI presentation, etc.)



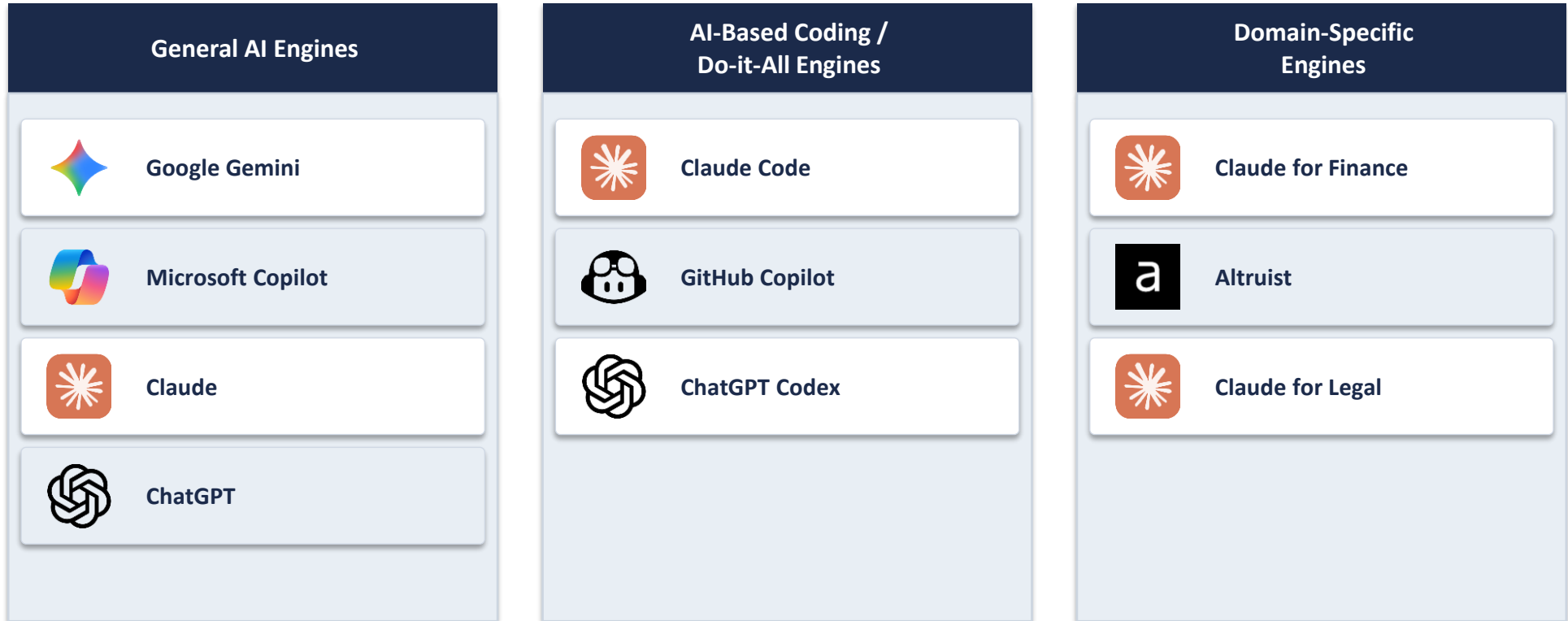
- **Meeting Prep** – Give it context and ask What questions would you ask? What questions am I likely to get in this meeting?



- **Specialized Tasks** – Draft RFP, provide investment insights, generate Trust Summary, Plan my family vacation, etc.

And many many many more...

# Sample AI-Powered Tools Landscape



**Key Takeaway:** This is just a snapshot — the AI tools ecosystem is vast and rapidly evolving. Many other specialized and general-purpose tools are available across every industry and function.

# EXAMPLE 1 – THOUGHT-PARTNERING ON FUND RAISING STRATEGY



I manage donor relations with the Children's Museum in Acton, MA. We need to raise more money to expand our facilities and children educational programs. Can you help me to identify the what types of donors I should target and how I should segment the donor population? And for each population, what is the best way to reach them and appeal to them?

That's a wonderful mission — and in a community like Acton/Concord/Lexington (high education levels, strong family orientation, philanthropic culture), you have real opportunity if you segment intentionally.

Below is a structured donor strategy tailored to a children's museum in an affluent, family-centric Massachusetts suburb.

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## 1 Start With Clear Donor Segments

For a children's museum expanding facilities + educational programming, your most promising donor categories are:

### A. Current Families (Active Users)

**Who they are:**

Parents & grandparents currently bringing children to the museum.

**Why they give:**

- Direct benefit to their own child
- Pride in local community
- Desire to “pay it forward”



# EXAMPLE 1 – THOUGHT-PARTNERING ON FUND RAISING STRATEGY



## 2 Segmenting Your Donor Database

You should segment by:

### 1. Capacity (Wealth Level)

- <\$250 potential
- \$250–\$1k
- \$1k–\$10k
- \$10k+

### 2. Engagement Level

- Active family
- Lapsed family
- Volunteer
- Event attendee only
- Never gave but attends

### 3. Interest Type

- STEM programs
- Arts & creativity
- Access/scholarships
- Facilities expansion
- Environmental education

### 4. Giving Motivation

- Child impact
- Community pride
- Legacy
- Tax planning
- Corporate visibility



## 3 Messaging Framework by Segment

Segment	Primary Emotion	Message Style	Call to Action
Current parents	Immediate impact	“Help YOUR child’s museum grow”	Join Family Builder Circle
Alumni parents	Gratitude	“You remember this place...”	Support next generation
HNW families	Leadership	“Be a founding expansion partner”	Naming opportunity
Corporations	Brand alignment	“Invest in the future workforce”	Sponsor lab/program
Foundations	Measurable impact	Data-driven, equity-focused	Fund specific initiative

## What Most Museums Get Wrong

- They rely too much on mass email.
- They don’t systematically score prospects.
- They don’t ask board members for real introductions.
- They avoid bold gift conversations.

## A More Aggressive (But Effective) Approach

Host 3–5 private “Vision Dinners”:

- 8–12 couples
- Executive director presents expansion vision
- Soft ask for leadership-level support
- Follow-up 1:1 meetings

This can dramatically accelerate early commitments.

# EXAMPLE 2 –COMMUNITY OUTREACH ON SNAP BENEFIT REDUCTION IMPACT



What can I help with?

I am the CEO of a health foundation in a large city in the US. I am concerned about the recent reductions in SNAP benefits and the risks to low-income members of our community being unable to secure adequate food for their families. How can I identify marginalized people in my community, who are now at risk of going hungry, and how can I proactively reach out to them to inform them of the emergency food assistance funding that our foundation is offering?

+ Deep research ▾ Apps ▾ Sites ▾



📎 Add photos & files

🖼️ Create image

🌐 Web search

✍️ Canvas

📖 Study and learn

🔍 Deep research

➔ Evaluate Internet Access Compare broadband cost, speed, and reliability across regions. Identify wher

analyze demand for learning different languages and how it connects t

lyze renting versus buying across major regions using price trends, int

recent climate, energy, and environmental data to identify the regions

## Identify and Reach At-Risk Residents

- 🕒 Map local demographic and socioeconomic data to identify high-risk neighborhoods.
- 🕒 Compile lists of community partners and frontline organizations for outreach.
- 🕒 Analyze SNAP enrollment and food insecurity indicators from official sources.
- 🕒 Design targeted communication strategies and multilingual outreach materials.
- 🕒 Plan logistics for distributing emergency food assistance through trusted channels.

Edit

Cancel

Start 43

# EXAMPLE 2 –COMMUNITY OUTREACH ON SNAP BENEFIT REDUCTION IMPACT



Research completed in 11m · 32 citations · 427 searches

Rapid, Equitable Response Plan to SNAP Reductions and Heightened Hunger Risk in a Large U.S. City

## Rapid, Equitable Response Plan to SNAP Reductions and Heightened Hunger Risk in a Large U.S. City

### Executive summary

Recent SNAP benefit reductions can rapidly increase hunger risk because SNAP is designed to support ongoing grocery purchasing for low-income households, and even “administrative” or eligibility-rule changes (not just benefit levels) can sharply reduce access by increasing churn, time limits, and procedural denials. A major example is the nationwide end of pandemic-era SNAP Emergency Allotments after the February 2023 issuance, which returned households to standard benefit amounts and required proactive communication so households could plan. <sup>1</sup> In addition, **the SNAP provisions of the One Big Beautiful Bill Act of 2025 (Public Law 119-21, signed July 4, 2025)** include multiple policy changes affecting eligibility, benefits, and administration—most notably modifications to time-limited work requirements (ABAWD rules), shifts in utility-allowance rules, and other provisions that can change benefit amounts and eligibility pathways. <sup>2</sup>

This report provides a rigorous, city-agnostic but immediately operational plan to:

- 17-page report divided into 7 sections, including research process followed, data sources and clear actionable next steps
- “Click-able” citations through the report
- All in less than 15 minutes from start to finish...

# EXAMPLE 3 – AUTOMATING GRANT APPLICATION REVIEW



## Hill Country Heritage & Innovation Fund

A GRANT PROGRAM OF THE LONE STAR COMMUNITY  
TRUST



```
Claude Code v2.1.39
Welcome back Martin!
Opus 4.6 · Claude Max · mouimet19@gmail.com's Organization
~/projects/psw

• Here's a complete summary of your previous work on the Grant Application Reviewer project:
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Project: Hill Country Heritage & Innovation Fund – Grant Application Test Harness

What Was Built

Across your previous session(s), you built a full test dataset and automated validation system for evaluating grant applications:

1. Fictitious Grant Program – The "Hill Country Heritage & Innovation Fund" from the "Lone Star Community Trust", modeled on the real Community Foundation of the Texas Hill Country. $200K total funding, $2,500-$20,000 individual grants, 4 focus areas, 12 eligible counties.
  - hill_country_grant.html / Hill_Country_Heritage_Innovation_Fund_2026.pdf
2. 100 Synthetic Grant Applications (generate_applications.py) – Uses real IRS data (671 real 501(c)(3) nonprofits from the IRS BMF) enriched with ProPublica 990 filings. Generates:
  - 40 valid applications (should pass)
  - 30 criteria violations (10 violation types: wrong county, too new, board giving, wrong docs, over/under amount, ineligible activity, no strategic plan, missing report, not 501(c)(3))
  - 30 fraudulent (11 fraud types: fake EIN, EIN/name mismatch, inflated/deflated revenue, duplicate board, inconsistent financials, phantom org, address mismatch, recycled apps, shell org network, copied descriptions)
  - Outputs: grant_applications.json, grant_applications_summary.csv, grant_applications_answer_key.csv
3. Automated Validator (validate_applications.py) – Performs 15 validation checks using real external data (ProPublica API, IRS records) plus internal consistency/cross-application analysis. Produces an interactive HTML report (grant_validation_report.html) with:
  - Clickable dashboard cards, sticky filter toolbar (search, classification, focus area, county, flag type, sort)
  - Expand/collapse, keyboard shortcuts
  - Detection results: ~95% of valid apps passed, ~93% criteria violations caught, ~87% fraud detected

Bug Fixed

- Form 990 revenue/expenses/assets were showing as $0 in the report. Root cause: ProPublica org-level fields often return None – fixed to prefer filing-level data.

Current State

The project is functionally complete as a test harness. All files exist and the validator works end-to-end. No git repo has been initialized.

Possible Next Steps (not explicitly discussed)

- Building the actual "grant evaluator" application that this test data was meant to test
- Improving detection accuracy (4 fraud apps still slip through, 2 valid apps get false positives)
- Adding version control

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What would you like to work on next?

* Cooked for 3m 49s
```

# EXAMPLE 3 – AUTOMATING GRANT APPLICATION REVIEW

## Grant Application Validation Report

Hill Country Heritage & Innovation Fund — 2026 Grant Cycle

Generated February 23, 2026 at 10:30 AM

**100**

TOTAL  
All applications

**26**

DATA MISMATCH  
26% of applications

**23**

CRITERIA NOT MET  
23% of applications

**51**

ALL CLEAR  
51% of applications

SEARCH

Name, EIN, or App ID...

CLASSIFICATION

All Classifications ▾

FOCUS AREA

All Focus Areas ▾

COUNTY

All Counties ▾

FLAG TYPE

All Flag Types ▾

SORT BY

Default (severity) ▾

Showing **100** of 100 applications

Expand Visible

Collapse All

### Validation Methodology [show details](#)

Each application was evaluated against the grant program's eligibility criteria and independently verified using external data sources. The validator performs 15 distinct checks organized into data mismatch detection and criteria compliance categories.

#### External Verification Sources

- **ProPublica Nonprofit Explorer API** — EIN verification, Form 990 revenue/expense/asset data, registered name and address
- **IRS Exempt Organizations BMF** — Tax-exempt status, subsection code, ruling date
- **Cross-Application Analysis** — Detecting shared contacts, addresses, and related entity networks across all 100 applications

#### Validation Checks Performed

- EIN existence & name match against IRS records
- Financial consistency: budget vs. Form 990 filings
- Address verification against 990 filing address
- Board composition anomaly detection
- Application date & program/focus alignment
- Geographic eligibility, operating history, board giving, financial docs, amount range, ineligible activities, strategic plan, prior reports, 501(c)(3) status

# EXAMPLE 3 – AUTOMATING GRANT APPLICATION REVIEW

HCHIF-2026-003 **Stonewall Athletic Booster Club**

ALL CLEAR

EIN: 460792649

LOCATION: Comfort, Kendall County, TX

FOCUS AREA: Environmental Stewardship

FUNDING TYPE: General Operating Support

AMOUNT REQUESTED: \$8,500

ANNUAL BUDGET: \$88,439

YEARS OPERATING: 13.2

BOARD SIZE: 14 (100% giving)

STRATEGIC PLAN: Yes

FINANCIAL DOCS: Board-approved financial statements

Program: Youth Environmental Education Camps — Youth Environmental Education Camps: Week-long summer camps for Hill Country youth (ages 10-16) focused on ecology, wildlife identification, water science, and conservation leadership skills.

## IRS / FORM 990 VERIFICATION (2024)

IRS Registered Name	Stonewall Athletic Booster Club
IRS City/State	Comfort, TX
990 Total Revenue	\$89,354
990 Total Expenses	\$71,486
990 Total Assets	\$39,038
NTEE Code	B12

All validation checks passed. EIN verified against IRS records. Financial data consistent with Form 990 filings. Organization meets all geographic, operational, and documentation requirements for the Hill Country Heritage & Innovation Fund.

### DATA MISMATCHES

#### Organization Name / EIN Mismatch

The organization name on this application ("Ridgetop Youth Leadership Academy") does not match the name registered to EIN 260457028 in IRS records ("Southwestern Border Sheriffscoalition"). This may indicate the applicant is using another organization's EIN or has provided incorrect information.

Source: ProPublica Nonprofit Explorer API / IRS EO BMF

#### Inconsistent Financials

The application reports total expenses of \$161,669 against total revenue of \$65,325 — expenses are 2.5x revenue. This extreme imbalance suggests potential financial misrepresentation or an organization in severe financial distress.

Source: Application-reported 990 data vs. internal consistency check

### CRITERIA ISSUES

#### Financial Documentation

For an annual operating budget of \$619,405, the grant requires "CPA-audited financial statements". The applicant submitted "Board-approved financial statements", which does not meet the documentation threshold for this budget tier.

Requirement: Budget \$619,405 requires: CPA-audited financial statements

### CRITERIA ISSUES

#### Ineligible Activity Detected

The program description contains language associated with ineligible activities: multi-year. The fund does not support capital campaigns, endowments, events, retroactive funding, debt retirement, multi-year commitments, scholarships, political activities, or religious purposes.

Requirement: Program must not involve ineligible activities

- 1. AI as a thought-partner** – Looking for ideas on how to use AI in your day-to-day work, ask AI!
- 2. Ethical AI** – Think about where and how AI should be used in your organization and how it aligns to Community Values
- 3. Think big!** – Go beyond the “rephrase this paragraph” usage. Give it a goal, an entire project and see how it does.

## CONTACT INFO

For more information and to request a copy of these materials



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