



AI for Nonprofits

Local AI for Local Impact

Where AI answers the phone, thanks every donor, keeps grant deadlines in view and takes the busywork off a small staff, so you can serve more people without more hours.

- 1 Take the 2-minute self-check
- 2 See what AI can take off your staff's plate
- 3 Bring your answers to a free 20-minute call

Planet AI

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Where can your nonprofit win first?

Answer yes or no for how things work today.

1	When your team can't pick up, or it's after hours, calls still get answered instead of going to voicemail.	Yes / No
2	People can book a service, sign up to volunteer or reserve a spot without someone scheduling it by hand.	Yes / No
3	Web forms, emails and messages get a reply within an hour.	Yes / No
4	I start each day knowing what needs me, without digging through email.	Yes / No
5	My inbox takes less than 30 minutes a day.	Yes / No
6	Every grant deadline and funder report is tracked and started on time.	Yes / No
7	Every donor is thanked within 48 hours.	Yes / No
8	Staff and volunteers can find answers (policies, program rules, how-tos) without asking me.	Yes / No
9	Lapsed donors and past volunteers hear from us every season.	Yes / No
10	The executive director spends under 5 hours a week on admin.	Yes / No

Your first opportunity

Every "no" is a place you can win first. A "no" is a prompt to look closer, not proof you need AI.

Bring your answers to a free discovery call and we'll show you where to focus first.

Ready to schedule? Book your discovery call →

20 minutes, free, no obligation. Or keep reading to see what AI can take off your plate.

BEFORE YOU PICK

AI is a tool for the busywork, not a replacement for your people

The best AI is the kind you stop noticing. The phone gets answered, the inbox gets sorted, the thank-you goes out the same day, and your morning starts with a plan. That frees a small staff for the work only people can do.

AI is good at

- Answering the phone, taking intake and screening scam calls
- Sorting your inbox and preparing replies for your approval
- Briefing you every morning on what needs your attention
- Drafting grant sections, donation requests, thank-yous, board reports and posts in your voice
- Scheduling volunteers with proactive messaging
- Following up with lapsed donors and past volunteers
- Turning a board meeting into minutes and a to-do list

AI is not good at

- Judgment calls about the people you serve
- Relationships with donors, funders and your board
- Deciding things you haven't decided yet
- Fixing a process nobody has written down
- Replacing a person who knows your community
- Handling client health, case or minors' data without the right safeguards

NOT ANOTHER CHATBOT

	A CHATBOT	AI ON YOUR TEAM
Memory	Forgets everything when you close the window	Remembers your programs, donors, decisions and how you like things done
When it works	Only when you type a question	On a schedule: briefs at 5 AM, reports on Monday, alerts the moment something happens
Where it works	In a browser tab, on its own	On your own computer, working with your files, email and apps
What it touches	Just the chat box	Your email, calendar, phone, files and donor list
Whose it is	A generic tool anyone can use	Set up on your accounts, in your voice, with you approving what goes out

What can AI take off your plate?

Picture these at your organization. We'll find which ones pay off for you on your discovery call.

YOUR SECOND BRAIN · THE PART THAT FEELS LIKE MAGIC

01

Morning briefing

Before you're up: today's calendar, the emails that need you, grant deadlines coming due and yesterday's gifts, all on one page.

02

Email triage

Your inbox sorted into what needs you now, what can wait and potential junk, with reply drafts in your voice for your approval.

03

Meetings to action

After a board meeting or a funder call, AI turns the recording or your notes into a short summary, a to-do list showing who owns what, and a follow-up email ready to send.

04

Ask your organization

Your policies, program rules, eligibility, volunteer handbook and past reports in one private assistant. When staff or volunteers ask "who qualifies for..." or "how do we handle...", it answers in seconds, even by text.

05

Writing in your voice

AI learns how you write from your past donation requests, grant narratives and newsletters. Then it drafts the next grant section, thank-you letter, board report or social post in your words, for you to edit and approve.

06

Funder and community monitoring

A weekly sweep of new grant opportunities that fit you, local news, and what peer organizations are doing, so nothing worth applying for slips by.

We run Planet AI this way

We use these tools every day, starting with our own morning brief. We don't recommend anything we would not use ourselves.

At your front door and in your back office

YOUR FRONT DOOR

07

Voice Mail Extended

Our voice AI answers your calls 24/7, or just missed calls and after hours. Your choice. It takes intake, books appointments and volunteer shifts, answers common questions, transfers urgent calls and screens out scam calls. No one spends time on long voicemails: a summary lands in your email the moment each call ends.

08

AI-enabled website chat

Greets visitors on your website and holds a real conversation, not a menu of canned answers. It knows your programs, answers eligibility and hours questions, signs up volunteers and captures contact details day or night.

09

Intake and eligibility screener

Asks the few questions that decide whether someone qualifies, day or night, and sends a complete intake to your staff instead of a voicemail.

10

Donor and grant prospecting

Finds funders and donors who look like your best ones, researches them, and drafts a first note for your approval.

11

Reputation and visibility

Every Google review answered in your voice, happy supporters asked for one, and your Google Business Profile kept current.

Where most nonprofits start: Voice Mail Extended, so intake calls and volunteer questions stop landing on the one person at the desk.

YOUR BACK OFFICE

12

Grant drafting and reporting

Grant sections and funder reports drafted from your past applications, program numbers and outcomes, ready for your review before every deadline.

13

Volunteer and program scheduling

Shifts, appointments and classes scheduled without the back-and-forth, with reminders and confirmations sent automatically.

14

In-kind donations and inventory

Donated goods logged with a phone scan, tax receipts sent on their own, and supplies reordered before you run out.

15

Thank-yous, follow-up and reactivation

Every gift acknowledged within 48 hours, pledges followed up, and lapsed donors and past volunteers brought back each season.

16

Watchdog alerts and weekly numbers

A text when something needs you, like a large gift, a bad review or a missed deadline, plus a short weekly report for you and a monthly one for the board.

Your audit shows which of these pay off for you, and in what order.

PICTURE IT

A day with AI at your nonprofit

Same director, same staff, same hours. The difference is what's already done when you get to it.

5:00 AM	MORNING BRIEF	Waiting in your inbox: 3 emails need you, one grant report is due Friday, and yesterday brought four gifts, one of them new.
7:30 AM	EMAIL TRIAGE	Overnight email is sorted. Nine replies are drafted, including two volunteer inquiries; you approve them over coffee.
9:40 AM	VOICE MAIL EXTENDED	You're in a client meeting. The AI takes an intake call, checks eligibility and books an appointment for Thursday.
11:00 AM	THANK-YOUS	Yesterday's four donors get a personal thank-you in your voice. The new donor's letter is flagged for you to sign by hand.
1:30 PM	MEETINGS TO ACTION	Your funder call ends. The summary, the tasks and the follow-up email are ready.
3:00 PM	ASK YOUR ORGANIZATION	A new volunteer texts a question about the food pantry rules. The assistant answers from your own handbook.
4:10 PM	WATCHDOG	A \$2,500 gift comes in online. You get a text so you can call and say thank you today.
6:40 PM	VOICE MAIL EXTENDED	After close, a caller asks if Saturday's volunteer shift still needs people, and signs up while on the phone, with an emailed confirmation.
9:00 PM	REACTIVATION	Last year's Giving Tuesday donors who haven't given since get a note about this year's goal. Three give before morning.

An illustrative day. Every message to a donor, client or funder is reviewed by a person before it goes out.

What it feels like

You get home on time. Nothing slipped through the cracks today, no donor went unthanked, and tomorrow is already sorted. Your staff spend the day on people, not paperwork. Your audit shows what that's worth in real hours.

Free software you may already qualify for

Most small nonprofits pay for tools they could get free, and miss the ones that come with real money attached. One verification unlocks most of this list. We check what you qualify for as part of your audit.

Examples of free and discounted tech tools

Google Workspace	Free: Gmail on your domain, Drive, Meet, the Gemini app and NotebookLM
Google Ad Grants	Up to \$10,000 a month in Google search ads, if you keep the account healthy
Canva for Nonprofits	Full Canva Teams free for up to 50 people, including AI design tools
Claude / ChatGPT	Team and Business plans that don't train on your data, at up to 75% off
Microsoft 365	Business Basic free for up to 300 users; Premium 75% off

Terms as of September 2026; vendors change them. Eligibility usually means a 501(c)(3) with its own EIN; churches and fiscally sponsored projects have different rules. Others free or discounted: Slack, Adobe Express, Box, Salesforce (10 licenses), Zoom, Asana.

Before your team uses AI: a one-page policy

Nine in ten nonprofits already use AI. Fewer than one in ten see real results, and almost half have no policy (Virtuous / Fundraising.AI 2026 report). The difference isn't the tools: it's a shared way of using them, a one-page policy, someone checking the work, and tools connected to each other.

Your policy answers

- Which tools are approved, and on which plan
- What data never goes into AI (client health, minors, payment details)
- Who reviews anything sent to donors, clients or funders
- How you stay honest about AI-assisted content

Included in your audit

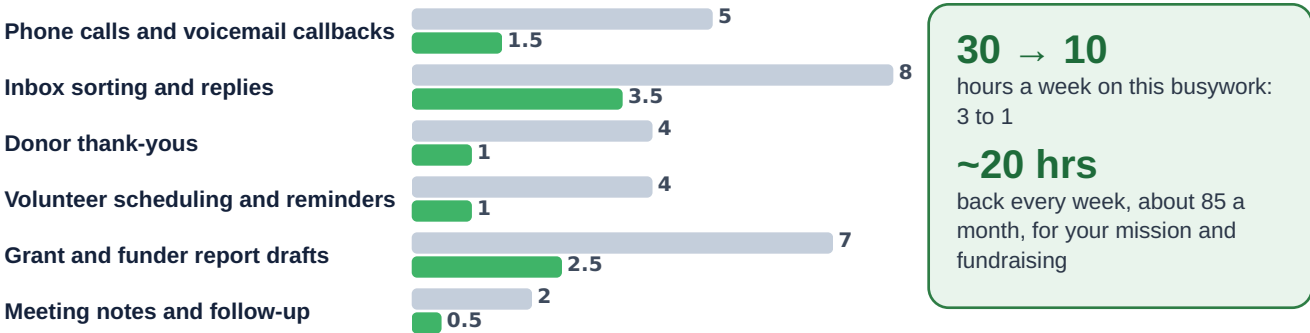
- A custom AI use policy for your organization
- A one-page board brief that explains why it matters
- Your free-software plan: what you qualify for and how to claim it
- Your own AI morning brief, yours to keep
- Policy documents are drafts; your attorney or board has the final say

How we find where the payoff is

STEP	WHAT HAPPENS	INVESTMENT
Discovery call	20 minutes. Your mission, what you've tried, and whether an audit or a specific AI tool is your best next step.	Free
Nonprofit AI Audit	We do deep research on your organization and its sector, talk with you and your staff, map how work flows, and show you what's worth doing in your numbers: hours back and donors kept. You receive a written plan: opportunities ranked with reasons, estimated impact with assumptions stated, next steps with costs, plus your custom AI use policy, board brief and free-software plan. Bonus: your own AI morning brief, set up on your computer and yours to keep.	\$850 Most nonprofits \$2,500 Larger teams Some nonprofits have a local business sponsor help with the audit cost. We'll help you ask.
Build and train	From a single Voice Mail Extended line to a full second brain, automations and custom apps that replace paid software you can drop, run for you or taught to your team. Free nonprofit software brings your costs down further.	\$400-600 typical monthly investment Entry point: Voice Mail Extended (AI receptionist) from \$145/month

What the payoff can look like

Illustration: a typical small nonprofit with 5 staff and about 400 donors. Hours per week, **before** and **with AI**. Your audit uses your own numbers.



An illustration, not a promise. The goal isn't fewer people. It's the same team doing more of the work only people can do.

Services are month to month. Prices as of September 2026. Your morning brief has no monthly charge; support for it comes with any plan. We set things up on team accounts that don't train on your data, and client, case and health details stay out of tools that aren't built for them. Donation requests and donor messages are drafted for your review and sent by you from your own accounts.

YOUR NEXT STEP

Getting ready for your 20-minute discovery call

The call tells us both whether an audit or a specific AI tool is the right next step. If it is, we'll schedule your audit visit and, if you want one, the conversation with a sponsor.

Think about

- Which of these ideas you'd want first, and why
- Where your week actually goes, and what you're always behind on
- How hands-on you want to be
- What you've tried before that didn't stick
- Who on the board should be part of the decision

Bring if you can

- Rough calls, emails and volunteer inquiries per week
- Info on the software you pay for each month
- Your donor count, average gift and how many gave last year but not this year
- Your self-check answers from page 2
- One recent client, donor or volunteer story that went wrong

Book your discovery call

20 minutes, by phone or video. No pitch until you ask for one, and no obligation to book an audit or buy anything.

Book your discovery call →

Click the button to pick a time on our calendar, or scan the code with your phone.



Scan to book

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Not listed yet? Add your nonprofit free at CountyReach.org, the resource directory for Bay, Okaloosa and Walton counties.