CASE STUDY

The Pathway School

How AI Learning Transformed Grant Writing Workflows



WIZE

2026

The Challenge

> A lean nonprofit development team faced growing grant demand — and a workflow that couldn't keep up.

The Pathway School is a Philadelphia-area nonprofit serving students with diverse learning needs. With a small development team, the school relies on grants, major gifts, and strategic partnerships to sustain its mission.

Jory Barrad, Director of Development and Communications, was managing multiple grant applications and Letters of Intent (LOIs) simultaneously — a juggling act familiar to anyone who has worked in nonprofit fundraising.

Competing Demands

- Writing customized LOIs for different funders with unique requirements
- Managing grant applications across multiple deadlines simultaneously
- Coordinating with team members on formatting, letterhead, and final review
- Ensuring a consistent organizational voice across all submissions

The Hidden Cost

The manual process was time-consuming. Each application required Jory to manually decide on formatting, letterhead usage, and task assignments — repetitive decisions that added up across dozens of applications per year.

Multiplied across 20, 50, or 100+ grant applications annually, these small decisions don't just consume time. They consume cognitive bandwidth that belongs on relationships and storytelling.

For development professionals managing dozens of applications per year, the question isn't whether AI can help — it's how quickly it can learn to work the way you do.

The Solution: WIZE Assistants

Jory began using Deb, WIZE's Development Writer Assistant — an AI tool designed specifically for nonprofit fundraisers — to draft and refine LOIs and grant applications. The initial value was immediate: faster writing, better consistency, and more time for relationship-building.

But what happened next is where the real innovation emerged.

Day 1: Jory used Deb to create an LOI for a funder. During the process, Jory decided to assign the formatting and letterhead task to Casey on the development team. A routine workflow decision — nothing unusual.

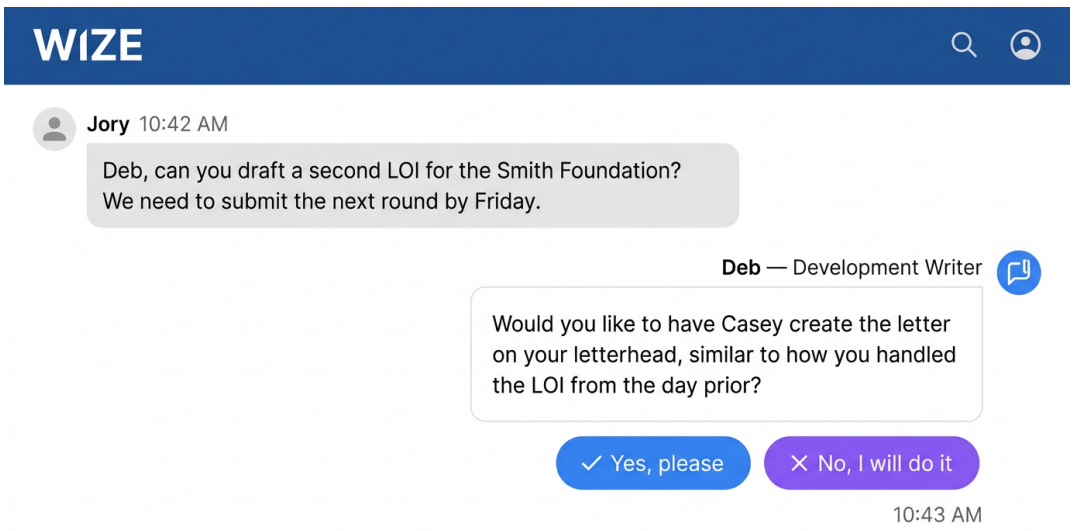
Day 2: Working on a second LOI for a different funder, Deb did something unexpected — without being asked, it proactively suggested reusing the same workflow pattern from the day before.

Deb had observed Jory's workflow pattern — that LOIs should be formatted by a specific team member on official letterhead — and proactively applied that learning to the very next task.

The system wasn't just helping Jory write faster. It was learning how The Pathway School works.

Most AI tools help you produce content more efficiently. WIZE does something different: it builds a working model of your organization's processes, preferences, and people — and uses that model to anticipate what you need before you have to ask.

DEB'S SUGGESTION — DAY 2



The Impact

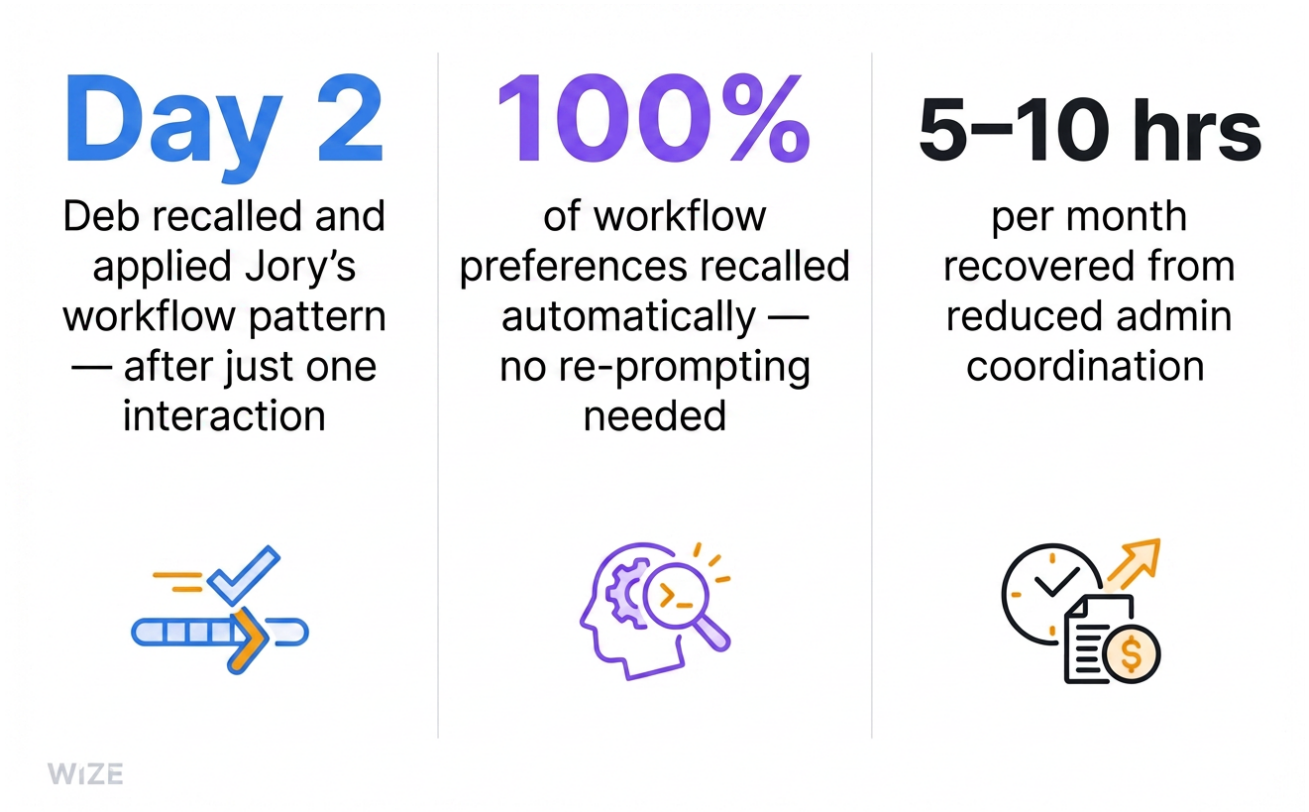
Over two months of continuous use, Deb became increasingly attuned to The Pathway School's specific processes, preferences, and organizational voice — delivering results across the entire grant writing workflow.

Reduced decision fatigue: Jory no longer had to manually specify task assignments for similar document types. The system learned the pattern and surfaced it automatically.

Faster turnaround: With Deb anticipating workflow preferences, less time was spent on instructions and coordination — freeing up time for actual writing and strategic thinking.

Consistent quality: Automating the assignment pattern ensured grant documents were consistently formatted and reviewed by the same team member, improving quality control at scale.

Scalable workflows: As the team continued working with Deb, the system became smarter about The Pathway School's processes — a compounding return on every interaction.



> ***"WIZE just keeps getting smarter as we go, learning our organization's profile and our attributes and how we manage tasks. I thought that was very cool because I didn't have to ask it to do it. And it was sort of right there with me, learning and moving along with me."***
>
> **— Jory Barrad**
> Director of Development and Communications, The Pathway School

This is the distinction that sets WIZE apart from generic AI writing tools. Most tools help you produce content faster. WIZE learns how your organization works — and starts anticipating what you need before you ask.

For small development teams stretched across dozens of grant applications per year, that difference is transformational. It shifts the cognitive load from routine decisions to what matters most: deepening funder relationships and telling compelling stories about impact.

The Pathway School's experience is not unique. It's a pattern that plays out across every nonprofit that commits to using WIZE consistently — and it grows stronger over time.

Key Lessons for Nonprofit Development Teams

1. **Start with a specific problem.** The Pathway School didn't try to overhaul their entire system. They started with one pain point — grant writing and LOI drafting — and let the tool build from there. Focus makes the learning faster and the ROI measurable.

2. **Give the tool real work.** The system only learns when you use it consistently on actual tasks. Two months of live grant applications taught Deb more about The Pathway School's workflows than any amount of upfront configuration could have.

3. **Let automation handle repetition.** The biggest win wasn't writing assistance — it was the system learning to anticipate task assignments and workflow preferences. Free your team from repetitive decisions so they can focus on what moves donors to action.

4. **Preserve human judgment.** While Deb learned patterns, Jory remained in control. The system suggested; Jory decided. This balance — AI that supports human judgment rather than replacing it — is what makes WIZE effective in fundraising.

