



Nonprofits and Artificial Intelligence Readiness Checklist

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What is Artificial Intelligence?

AI is the process of using computers to automate human tasks. It takes four components for AI to work effectively: **Strategy Questions** (applying it to your organization’s work); **Data** (lots of it); **Algorithms** (mathematical models to analyze the data), and **Tools** (computers and software).

Machine Learning

Machine learning projects will most likely use the data in your organization’s fundraising or program database to automate tasks, make predictions, or analyze data. Here are the steps and questions your organization should ask:

STEP 1: IDENTIFY A PURPOSE

It is essential to begin with project objectives or outcomes and the value that a machine learning project will bring to your organization’s mission. Bring a team together and discuss and agree on different ideas.

ORGANIZATION FUNCTION	RESULTS
Abbreviation	IaaS
PROGRAM	Automate repetitive or straightforward tasks like reporting, training, or other Deliver information to program users more efficiently and at scale
FUNDRAISING	Donor prospecting Improve retention Subscription giving Personalized online engagement or communication at scale Automate rote tasks to free up fundraiser time
MARKETING	Analyze campaign analytics Analyze the sentiment of unstructured data like social media Provide recommendations and analysis for A/B tests of online communications Provide recommendations and first drafts of personalized communications

WHAT IS YOUR PROJECT DESIGN CONCEPT? (Fill in this sentence)

Our organization hopes to use machine learning to analyze and answer this strategy question _____
and automate these tasks _____ and by doing so will help address the following problem(s):

Machine learning will help bring value to these specific external stakeholder groups _____ in this way

Machine learning to automate staff tasks will save this amount of staff time _____

Staff will be able to use this free time to drive deeper impact in the following ways:

STEP 2: PRESSURE TEST CONCEPT

Ask whether artificial intelligence/machine learning is the right approach to solve this problem or whether another approach is a better fit. Invite technology experts to review your project concept and give feedback.

STEP 3: DETERMINE CAPACITY

AREA	QUESTION
DATA	<ul style="list-style-type: none"> • Is your “owned” data usable, clean, complete, relevant information? • Do you have access to relevant third-party data sets? • Do you have a plan for collecting the data and the infrastructure to collect and house it? • Is your data set relevant and robust enough to answer your strategy question?
EXPERTISE	<ul style="list-style-type: none"> • Do you have access to people with expertise to build the algorithm for predictive models or evaluate “off the shelf” models?
ETHICS	<ul style="list-style-type: none"> • Do you have a strategy and plan to manage the ethical concerns around donor privacy or data bias?
ONGOING	<ul style="list-style-type: none"> • How will you manage the implementation and continuing care and feeding of your algorithms and data? • Do you have the capacity?

Chatbot Readiness Questions

Chatbots are online conversational interfaces that can automate providing information to end-users. Chatbots use a combination of machine learning and natural language processing.

STEP 1: IDENTIFY INTENT AND INFORMATION

ORGANIZATION FUNCTION	INTENT
PROGRAM	<ul style="list-style-type: none"> • Deliver information on demand to stakeholders 24/7 • Guide the audience to specific program information in a conversational way
FUNDRAISING	<ul style="list-style-type: none"> • Collect leads - newsletter or alerts sign up • Guide donors to relevant information • Assist with decision-making • Help donors set up a fundraiser
MARKETING	<ul style="list-style-type: none"> • Collect leads - newsletter or alerts sign up • Provide information on-demand 24/7 to stakeholders

Based on your intent, what information will the chatbot deliver, or what tasks will it automate for the end-user? Does the information exist now, or does new content have to be created?

STEP 2: IDENTIFY VALUE

How will chatbot augment the staff work?

How will chatbot save time for staff?

What benefit will a chatbot provide to the organization by automating information delivery 24/7 to stakeholders?

STEP 3: ETHICAL GUIDELINES

Does your organization have privacy guidelines in place to protect the privacy of the end-user?

STEP 4: PILOT DESIGN

How will stakeholders/end users be involved in developing, designing, and testing a chatbot prototype?

How will staff be involved in designing, testing, and training the bot?

Do you have access to people with technical and design expertise to build your chatbot?

How can you develop a low-risk prototype to understand the above questions using a bot authoring platform?



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