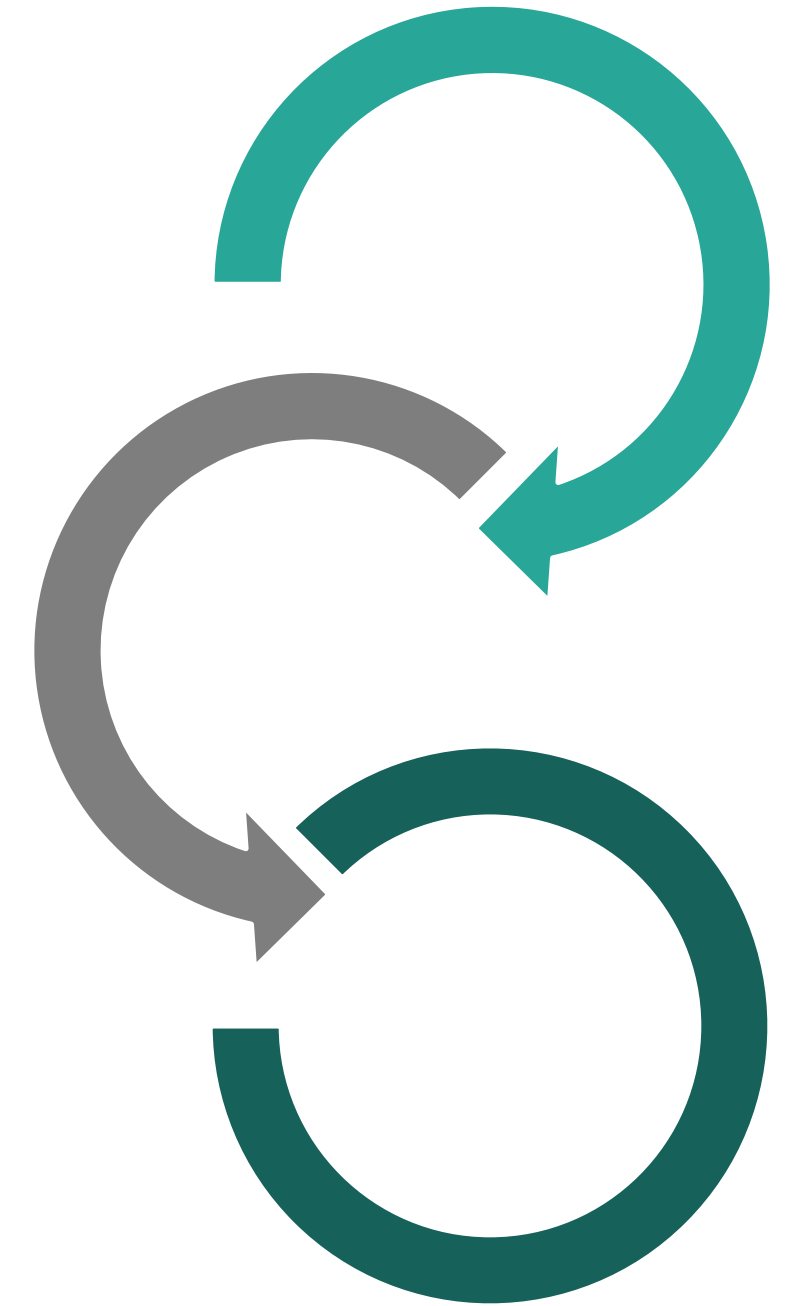


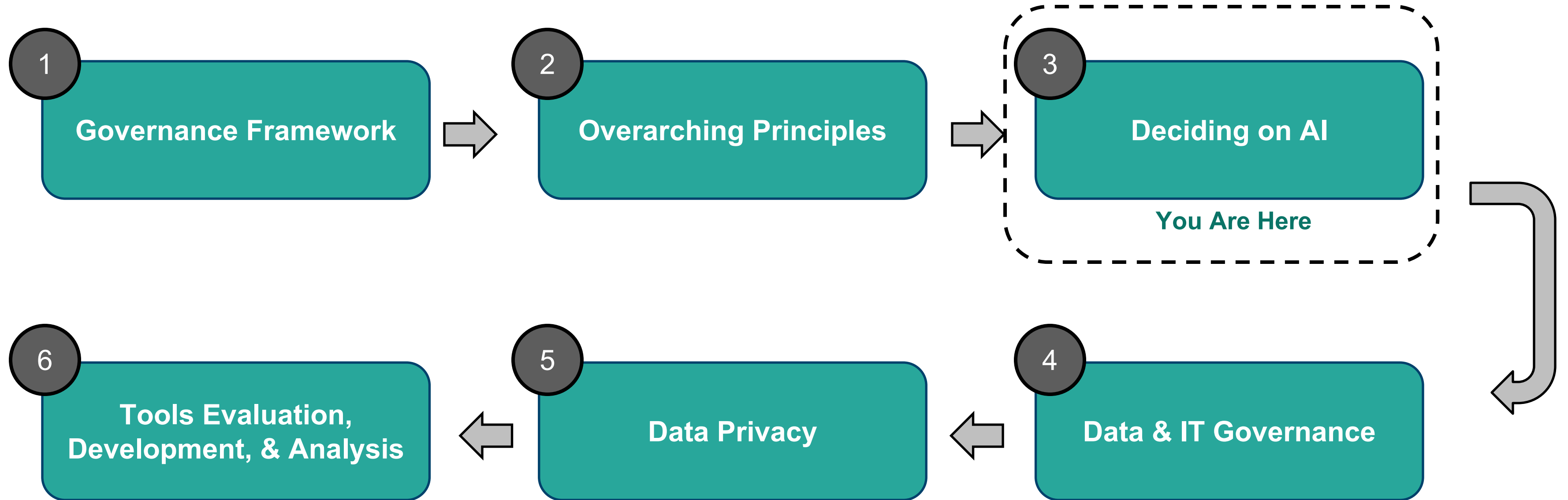
Deciding on AI

Frameworks for Making Decisions, Use
Cases & Tools

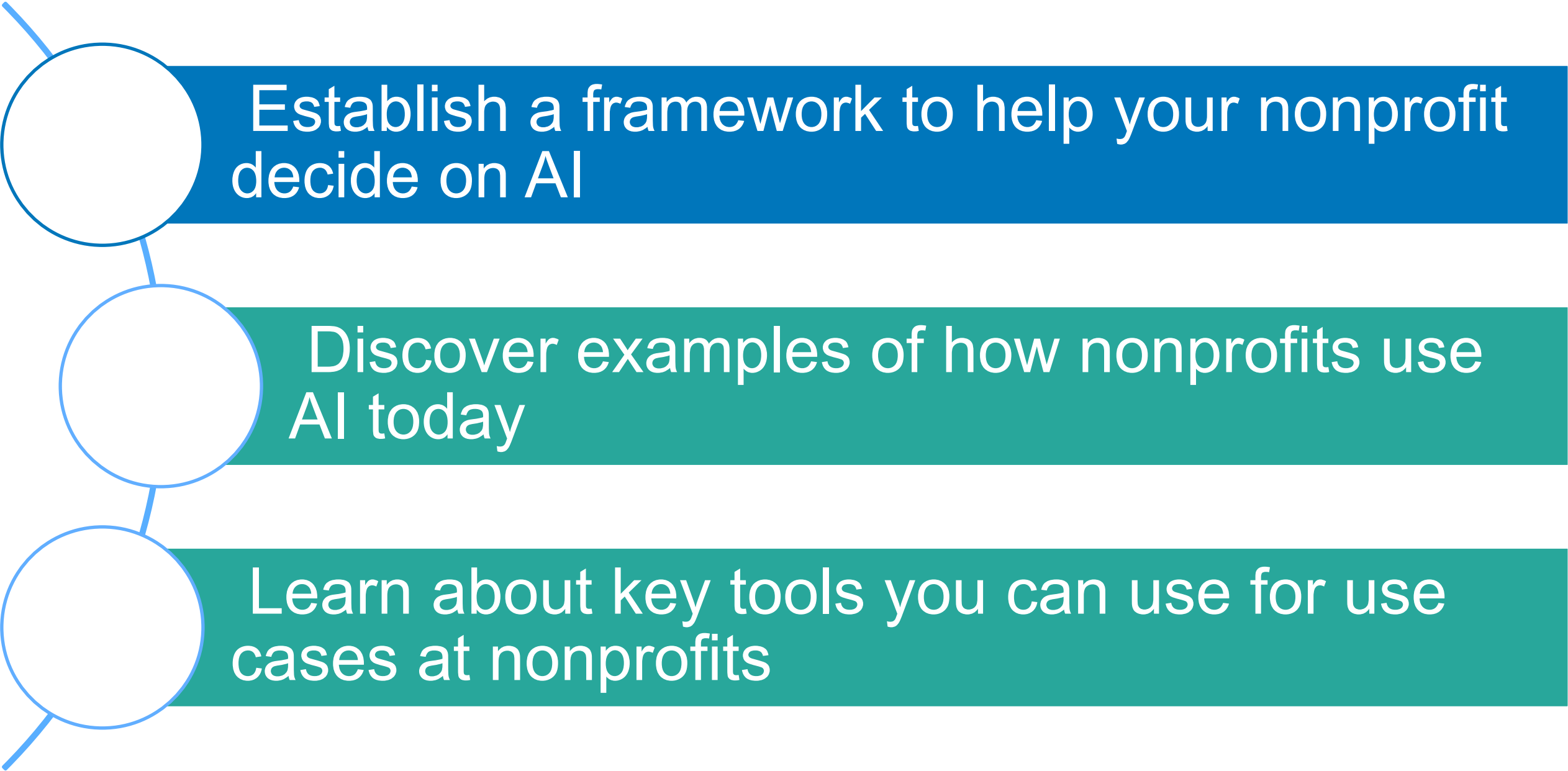
Presented by ANB Advisory Group
Afua Bruce and Rose Afriyie



Six modules will guide you through important considerations for nonprofits when implementing AI



At the end of this module, you will...



Establish a framework to help your nonprofit decide on AI

Discover examples of how nonprofits use AI today

Learn about key tools you can use for use cases at nonprofits

Consider impact, effort, and fit when deciding on AI



Questions for leaders at a nonprofit
Not Currently Building Technology



Additional questions for leaders at a nonprofit
Currently Building Technology

%



Impact

- How can AI help accelerate the impact my organization was founded to achieve?

- How might the AI model output help us achieve our mission?



Effort

- What effort is involved in switching from what we do now to AI? What risks and costs are involved in AI adoption?

- What effort, or ease of adoption, is involved in getting our data to a standard that would help us leverage AI? What is the cost and risk of adoption?








Fit

- How does AI adoption fit within near term metrics and current workflows?

- What capacity do we have to build while maintaining existing software?

[The Center of Excellence](#) asks government leaders to consider Impact, Effort, and Fit. We have adapted this framework for nonprofit leaders.

Additional questions to guide your organization address long-term support needs

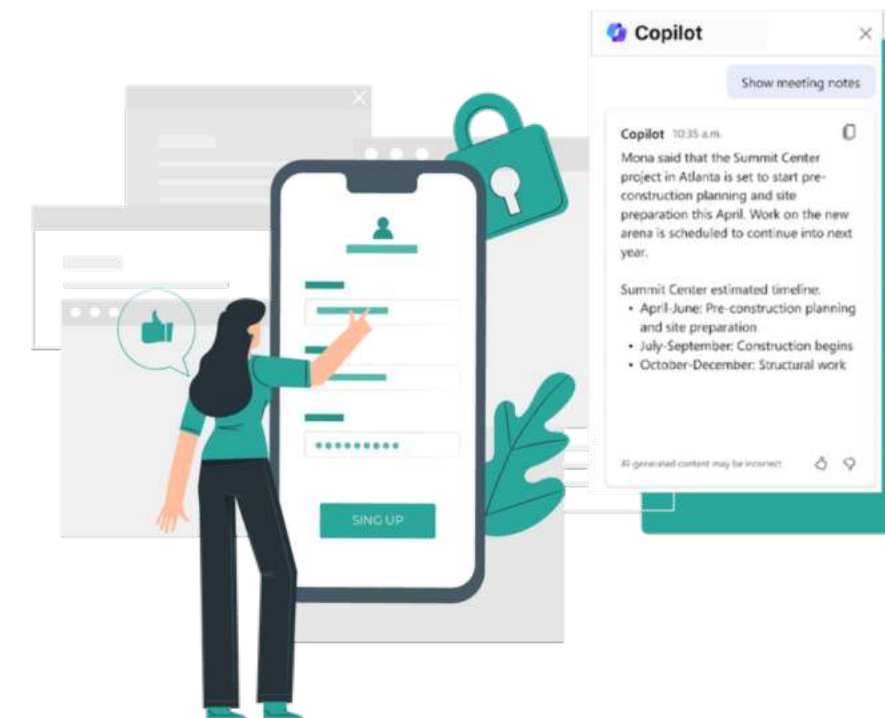
-  What additional work in your IT environment is required to support their product?
-  What does short-term and long-term maintenance look like?
-  What training is provided for users?
-  Who is responsible for monitoring output? What does success look like?
-  What happens if something goes wrong – who can turn off the tool?

Lived Experience: Example 1

Teams & Copilot for Notetaking



mRelief's mission is to transform access to social services for the inherent dignity of all people



Along with leveraging AI to help people sign up for SNAP, mRelief uses AI to take meeting minutes for board meetings in a way that facilitates even more conversation and connection.

Problem to Solve With AI

- Even more ease of documentation for Board and committee meetings
- Troubleshooting support when there is a recording malfunction or error.

Selection Criteria

- Continuous product support
- Integration with video conferencing

Ultimate Outcome

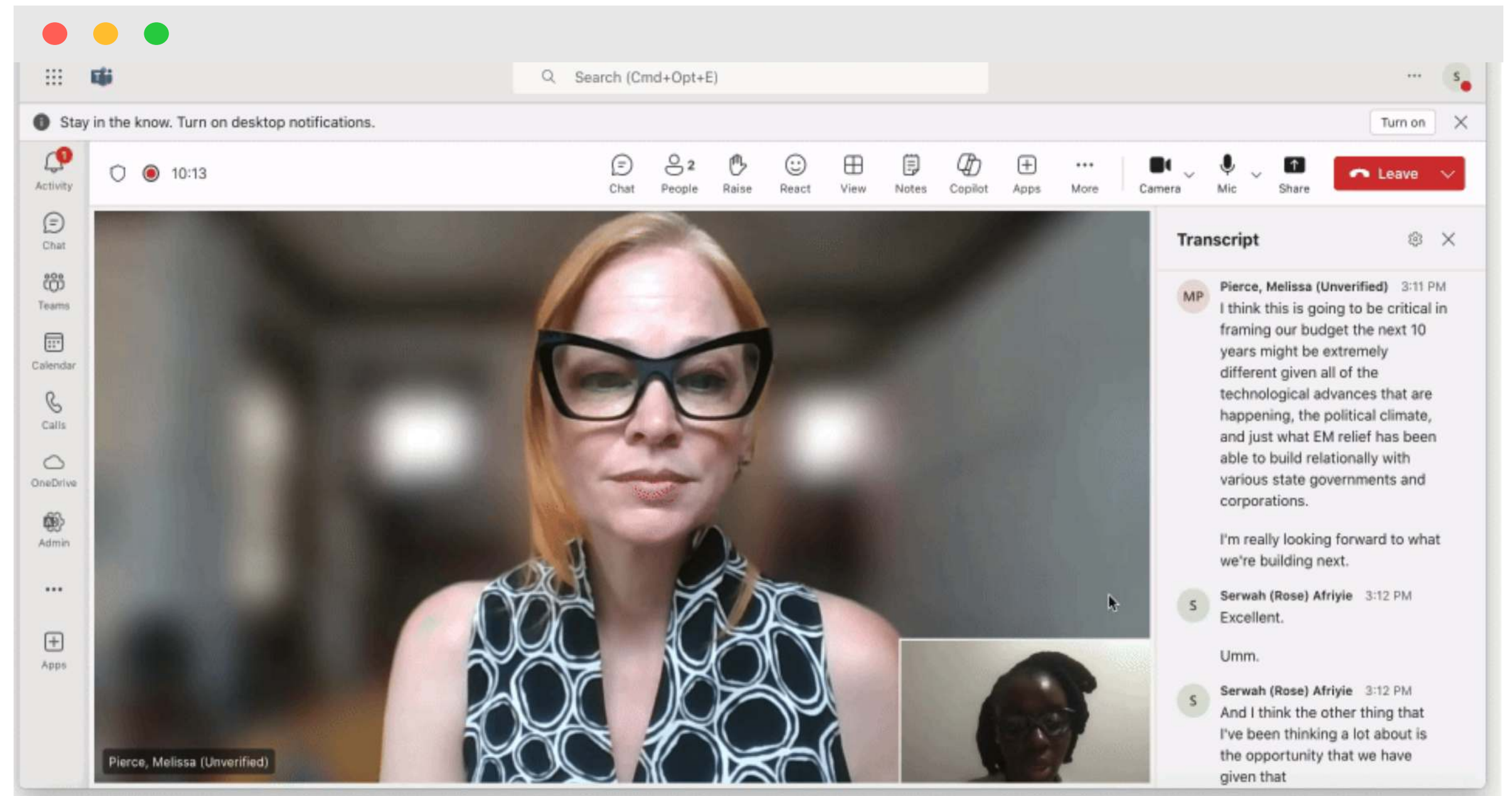
- While there were challenges with initial setup, there was support for troubleshooting and resolution that led to conversation and connection

Discussions Held About Ethics or Policy

- Two Board Members were consulted
- Consent was sought from entire board
- Feedback was taken after the first use
- Board Secretary looped in and live-review of recording to catch errors

NOTETAKING

- Microsoft CoPilot can help you take notes for board prep meetings or any other convenings your nonprofit must hold.



Lived Experience: Example 2

Refactoring Code & Data Cleaning



Giving Tuesday's mission is to build a world where generosity is part of everyday life



Along with leveraging AI for generating first drafts for communications, Giving Tuesday uses AI for debugging or generating code.

Problem to Solve With AI

- Refactoring a code repository
- Structuring unstructured data

Selection Criteria

- Cost

Ultimate Outcome

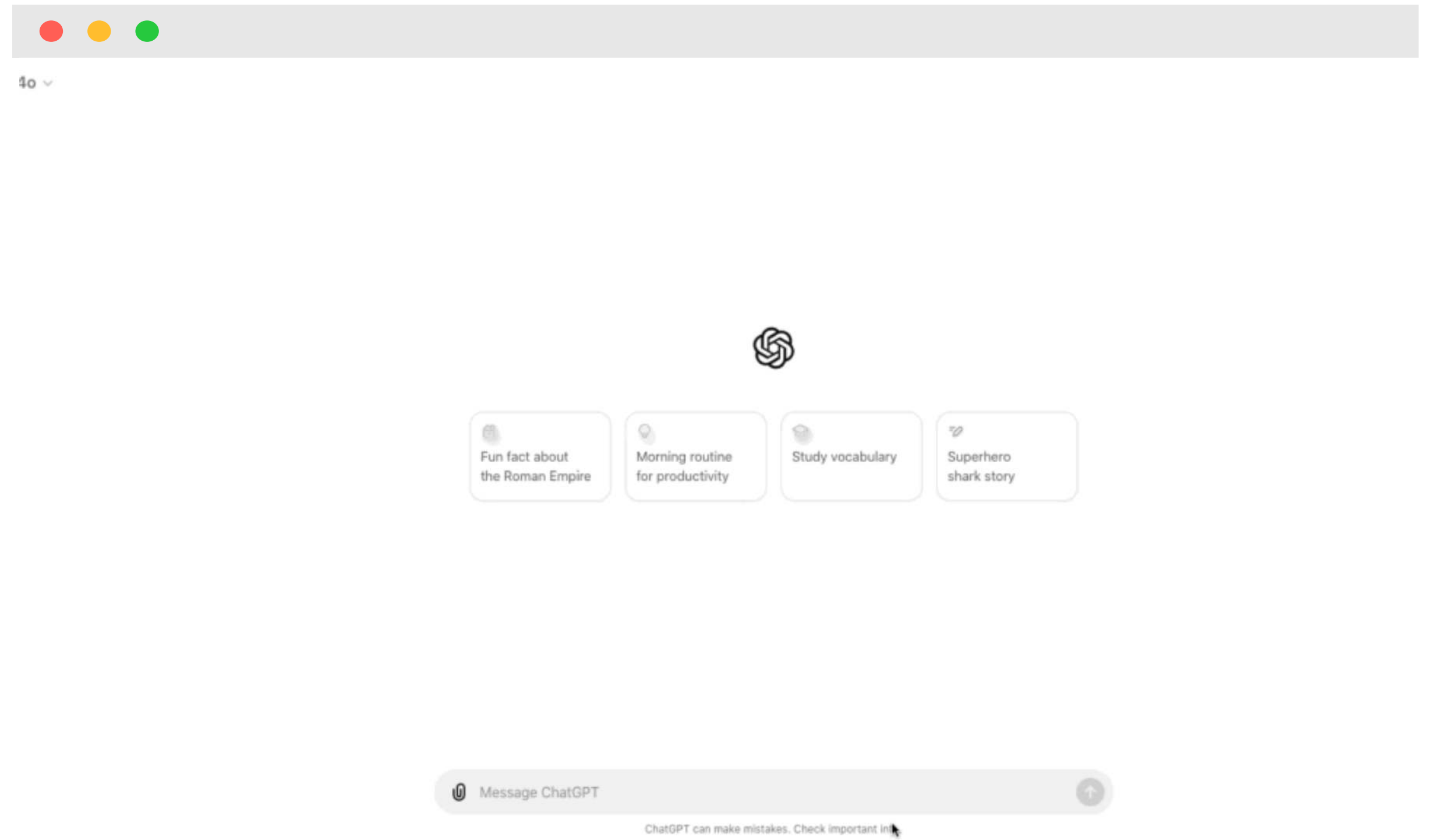
- For refactoring, used ChatGPT to develop scripts to automate and optimize the process
- For data cleaning, used ChatGPT to put survey questions into CSV format with useful metadata fields

Discussions Held About Ethics or Policy

- The GivingTuesday Data Commons: 300+ contributing partners and 50 global data labs and is the leading data collaboration on giving and generosity
- Strict policies around not handling datasets with Personally Identifiable Information

REFACTORING

- ◉ ChatGPT can help you refactor code in minutes using the Do Not Repeat Yourself Principle.



Lived Experience: Example 3

AI for GOTV



MOVE Texas Action Fund is dedicated to empowering underrepresented youth in Texas by ensuring their voices are heard and their votes are counted. Our mission is to build power in underrepresented communities through civic education, leadership development, and issue advocacy.



Problem to Solve With AI

- Improvement in our program and campaign planning by automating repetitive tasks, enhancing the quality of our strategies, and allowing our staff to focus on the core work

Selection Criteria

- Accessible
- Customizable
- Scalable

Ultimate Outcome

- Created a custom GPT called Plan Buddy
 - Uploaded w/external docs on goals & programs
 - Supported our internal program planning and brainstorming process

Discussions Held About Ethics or Policy

- Spoke about concerns with getting faulty information, policy recs and security concerns with uploading strategy
- Decided to keep docs external and to not use Plan Buddy or Chat GPT to provide any policy analysis

Tools to Consider & Monitoring Approaches: Marketing

MARKETING - First Drafts, Editing, SEO Optimization, Social Media, and Image Generation



- SEMRush - *Crafting SEO-friendly copy*
- Dall-E - *Generating images*
- Microsoft Copilot - *Generating images based on existing photos and brand*
- ChatGPT - *Transforming blog posts into social media*

-
- Use it for brainstorming
 - Know your voice
 - Center humans with consent

-
- Human review after content or images are generated
 - Audits on a sample of content when AI is generating content at scale, i.e. digital marketing



Example

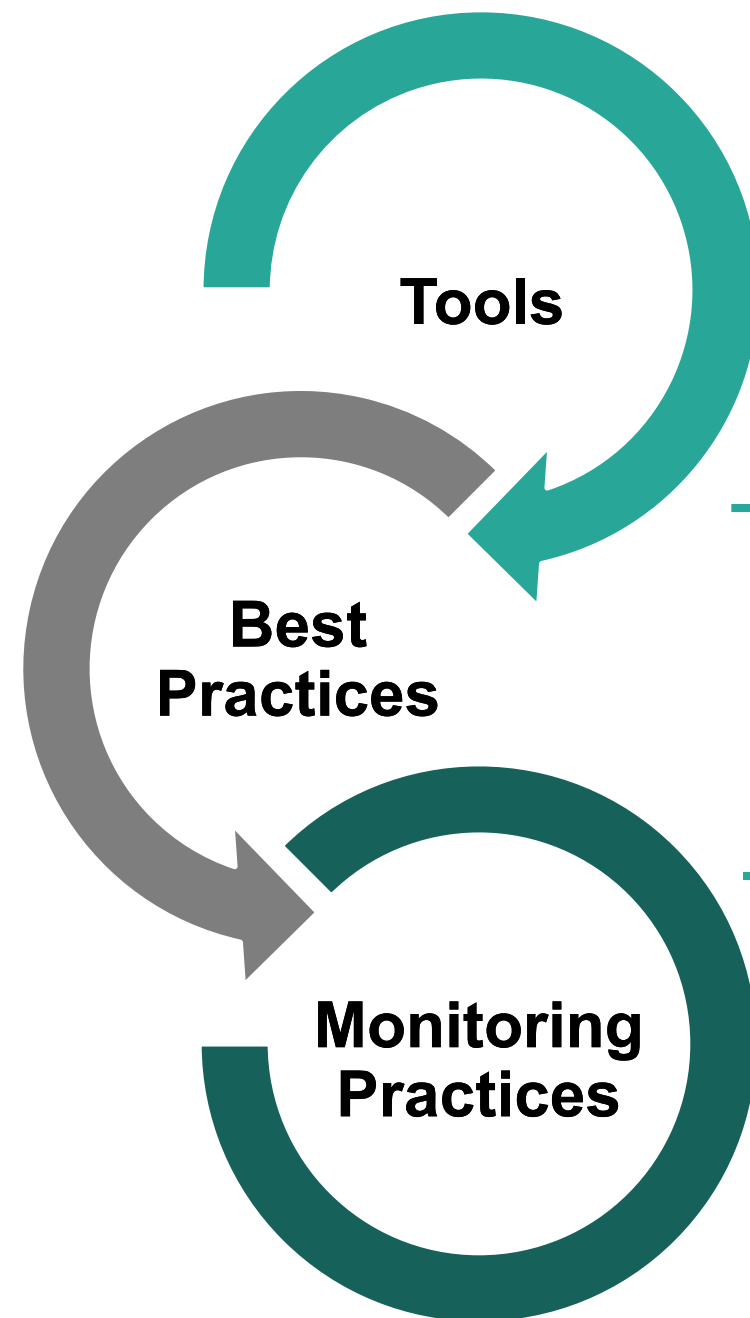
Leveraging ChatGPT for Marketing

“Float the Vote” campaign – it was utilized to support creative campaign ideas for GOTV and to translate ideas into a timeline

[The “Nonprofit Marketing Guide”](#) is an organization led by coaches that helps nonprofit communicators learn their jobs, love their work, and lead their teams. In this guide they provide an overview of key roles that nonprofits need and boil it down to three tasks: building audience, crafting compelling messages, and delivering those messages. Thus, consideration of AI tools are especially helpful inasmuch as they amplify those marketing functions.

Tools to Consider & Monitoring Approaches: Programs

Programs - Developing Innovative Testing Scenarios, Safeguarding Democracy from AI



- Custom-Build Tools - *Craft Testing Plans or Increase transparency of AI platforms*
- Copilot and Gemini - *Improve decision making with more robust metrics and provide translation for more languages*
- APIs for existing AI products - *Leverage APIs to simplify scheduling for clients*

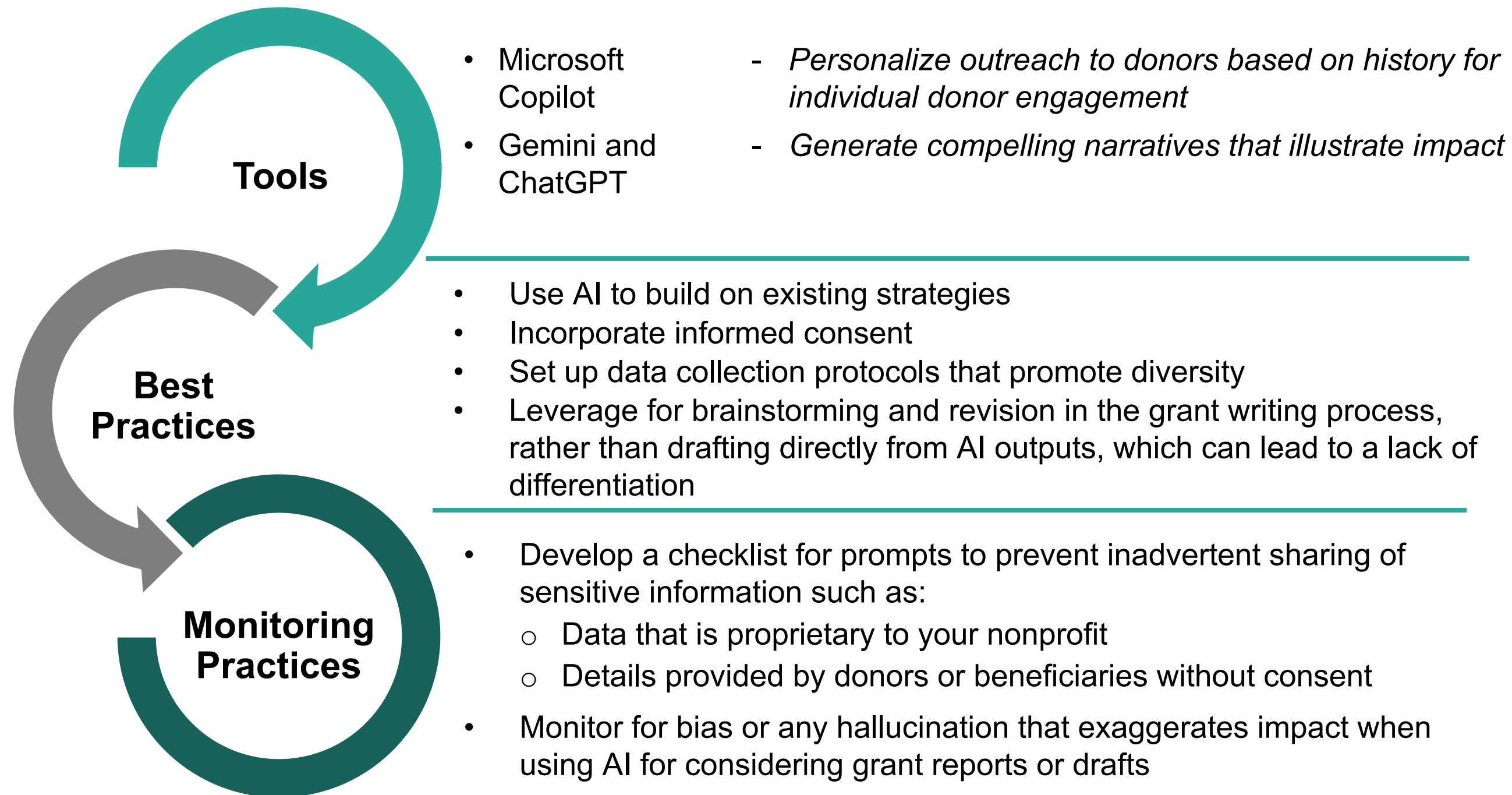
-
- Ensure tools fit into program management
 - Incorporate AI decision making as part of strategic planning

-
- Engage constituencies before and after adoption about their perspectives and the impact on service delivery

Note: As you consider adopting AI for your programs, consider that notable large foundations have partnered to support [AI for social good](#) and consider their framing and examples as a resource in your program design and expansion.

Tools to Consider & Monitoring Approaches: Fundraising

FUNDRAISING - Individual donor engagement, grant writing and reporting



Example

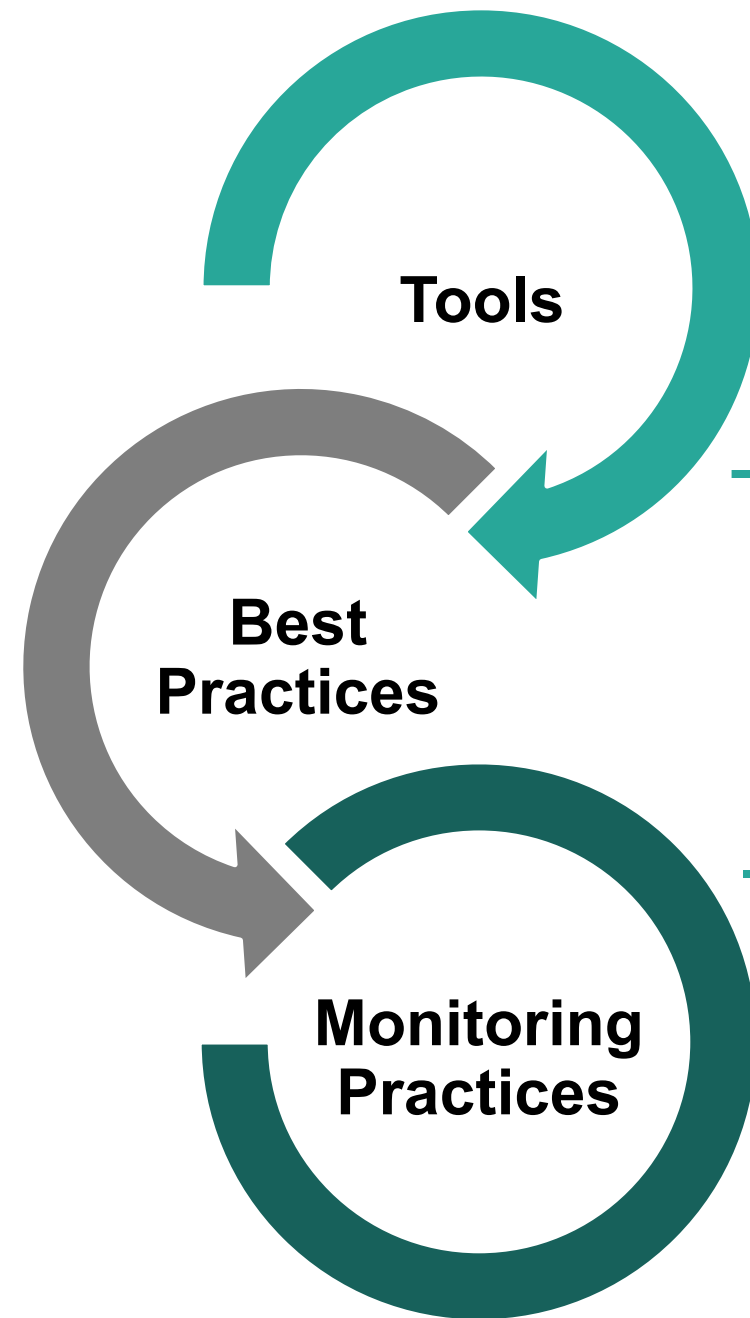
Coaching Fundraising Personnel

AI can coach fundraising personnel by aligning proposals with funder guidelines and identifying deviations. It can also revise grants for grammar, punctuation, and word count adherence.

Note: Fundraising.ai promotes the use of Responsible and Beneficial Artificial Intelligence for Nonprofit Fundraising.

Tools to Consider & Monitoring Approaches: Financial Analysis

FINANCIAL ANALYSIS - Gathering insights, accounts receivable, and reducing errors



- Copilot for Finance - *Supports the end-to-end collections*
- Intuit Assist - *Ask a chatbot for financial insights*
- Booke AI - *Match bank feed transactions with corresponding bills, invoices, or receipts and error detection software*

-
- Identify a use case that makes sense to incorporate AI
 - Leverage in-house and external expertise
 - Setup data collection protocols that promote diversity
 - Ensure humans are in the loop to audit performance

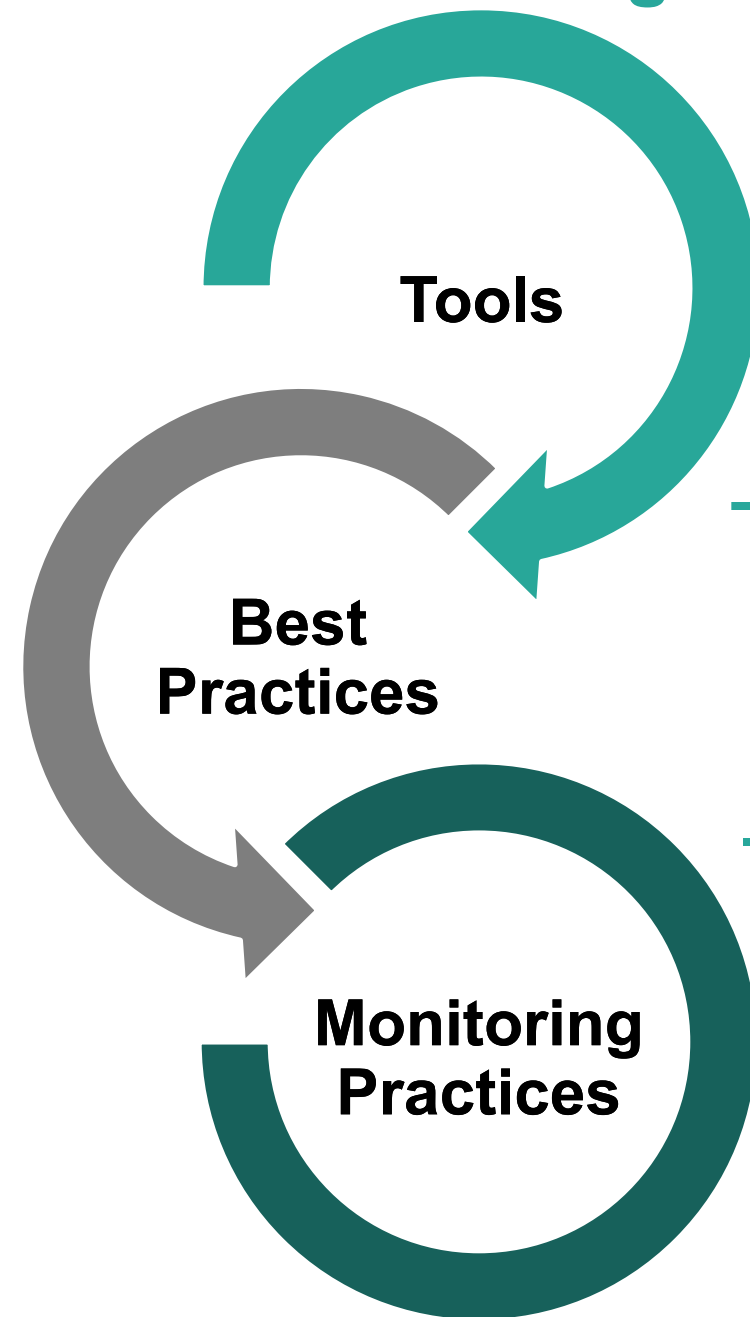
-
- Develop a parallel process during initial adoption to ensure all financial insights are tabulating correctly
 - Ensure a human is in the loop for collections correspondence
 - Generate a recovery plan in the event of any software down time

[Microsoft Copilot for Finance](#) is a new Copilot experience for Microsoft 365 that unlocks AI-assisted competencies for financial professionals, right from within productivity applications they use every day.

Tools to Consider & Monitoring Approaches:

Search & Knowledge Mining

SEARCH & KNOWLEDGE MINING - Summarizing in-depth policy documents, lengthy reports, or extract insights from your own database



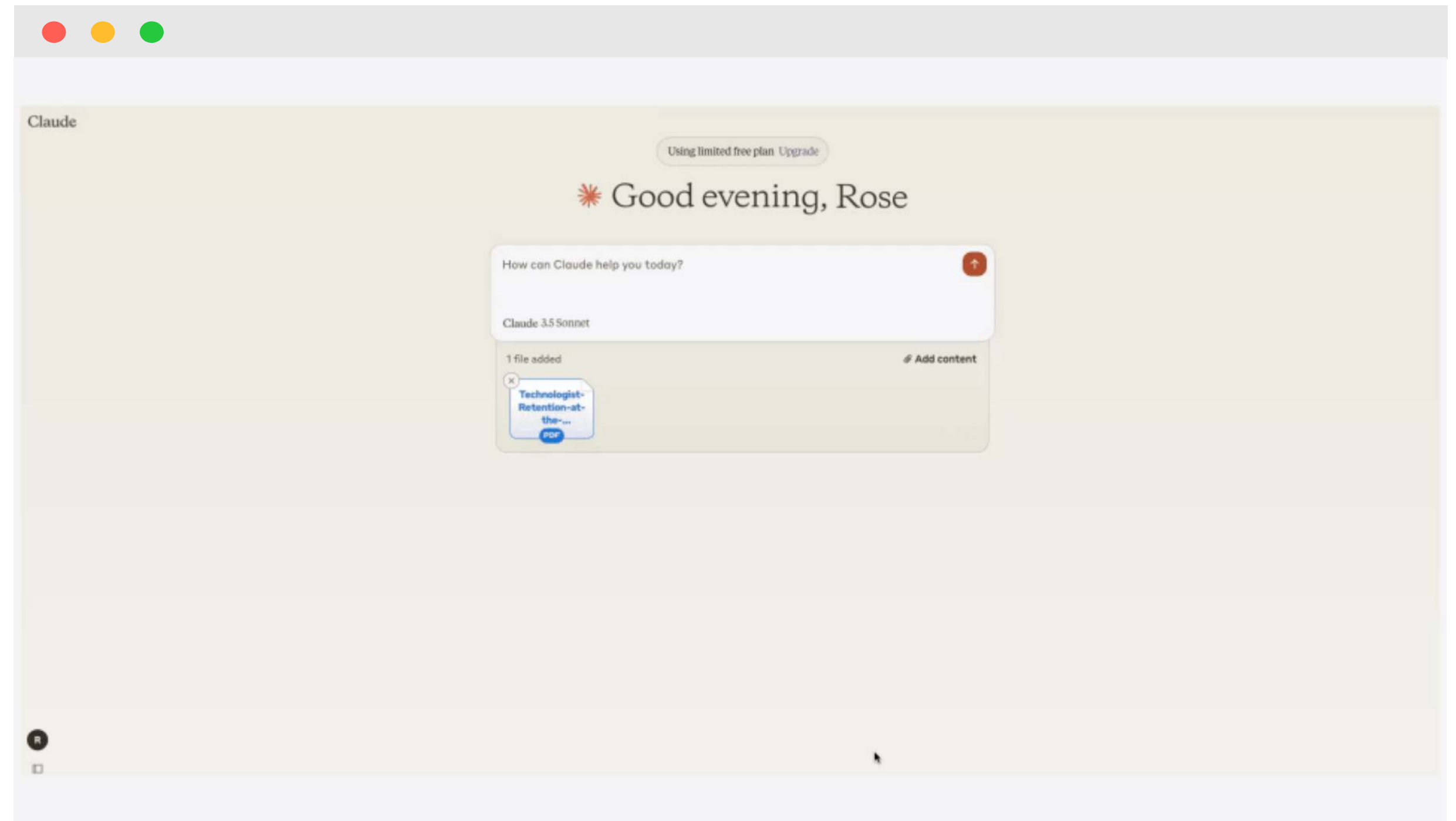
- Anthropic Claude - *Condensing long documents into concise summaries*
- Azure Cognitive Search - *For Tech Builders: a cloud search service that supplies infrastructure, APIs, and tools for searching*

- Leverage it to save time, but fact check with references
- Use cloud platforms for limited in-house computing resources or intense computing needs

- Develop KPIs for how AI tools should perform in providing accuracy
 - Indicators could include accuracy, completeness, engagement from team
- Seek feedback from multiple team members on the extent to which summaries are achieving KPIs for all use cases where it is being deployed
- Supplement AI summaries with subject matter expertise when summarization must inform decisions

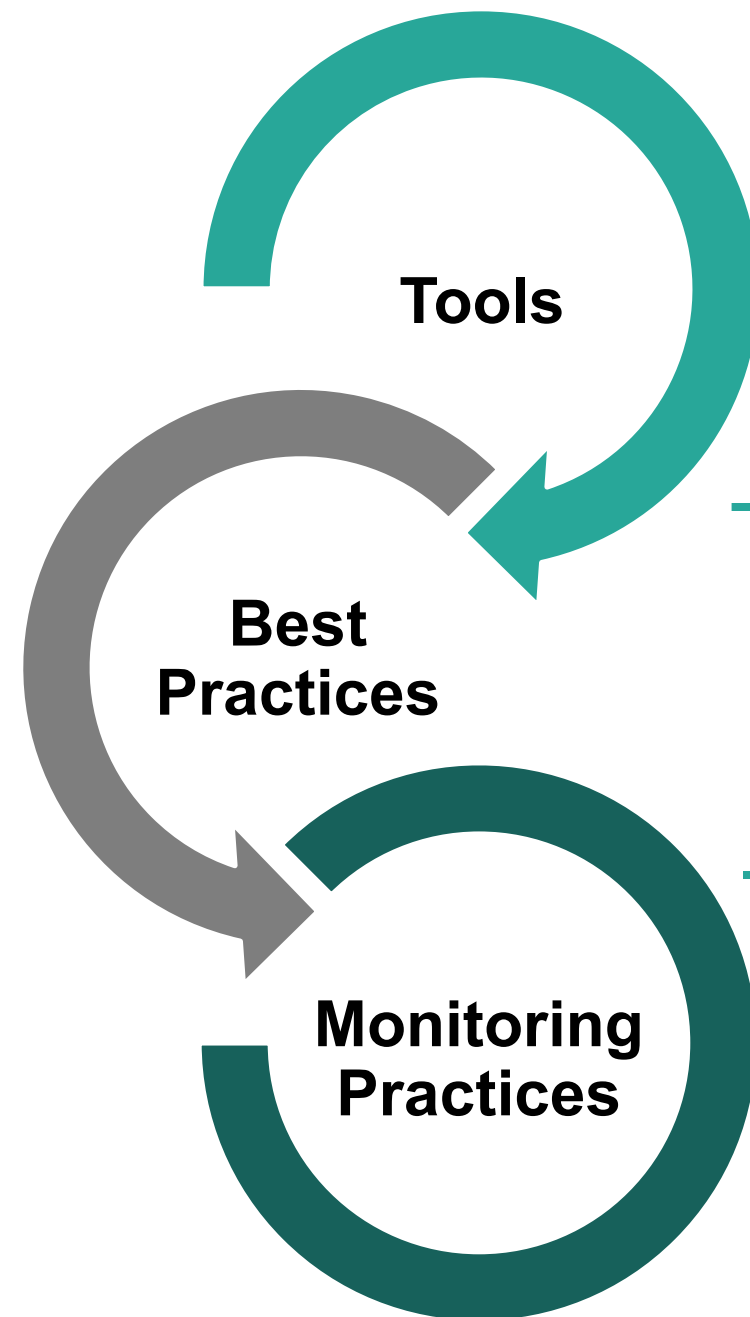
SUMMARIZING

- Claude can help you summarize in-depth reports into actionable next steps.



Tools to Consider & Monitoring Approaches: Customer Support

CUSTOMER SUPPORT- Streamlining communication, improving response times, and providing personalized assistance



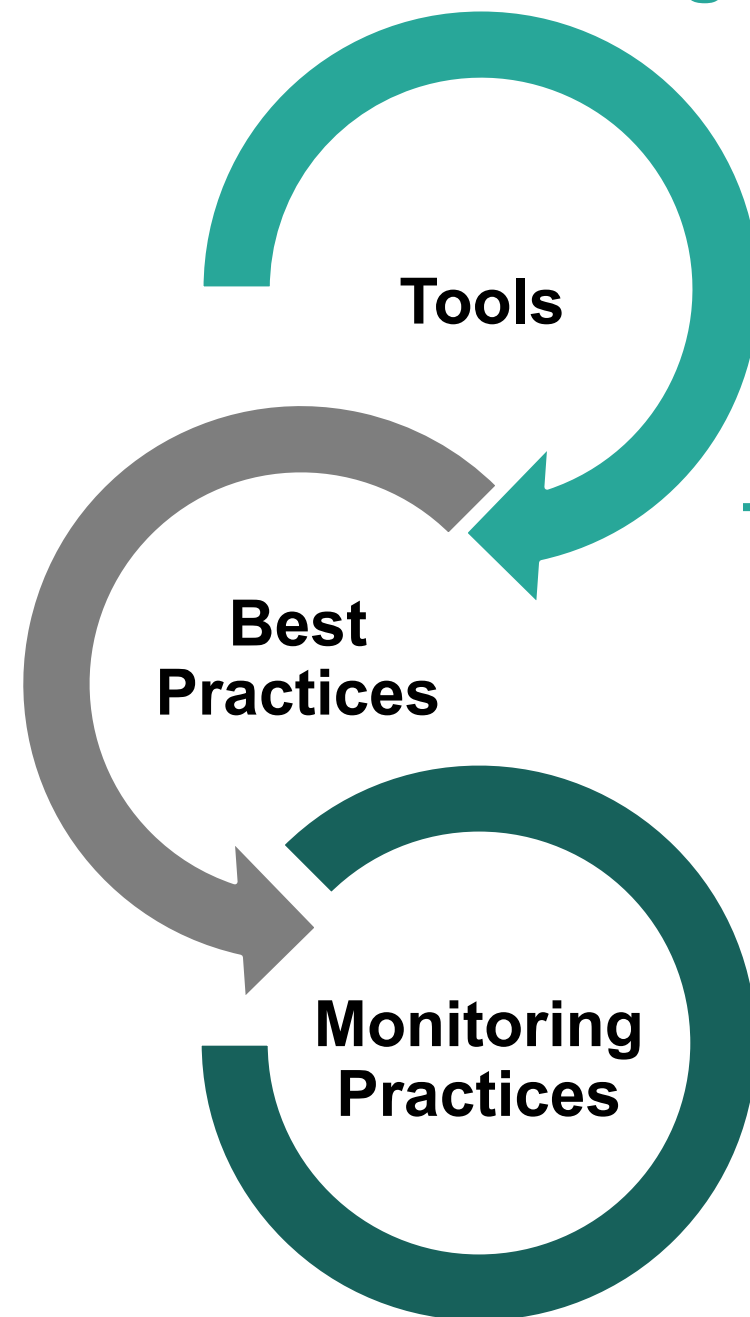
- ZenDesk AI - *An AI-powered customer support tool that helps manage and automate support tickets, providing quick responses and solutions.*
- Intercom - *Utilizes chatbots and automated workflows to engage with customers and provide support in real-time*
- Freshdesk - *AI capabilities that assist in ticket resolution, categorize support requests, and provide automated responses*

-
- Identify repetitive support tasks that can be automated to free up human resources
 - Train support staff to work alongside AI tools
 - Be transparent about when users are speaking to a human or speaking to AI

-
- Continuously monitor and refine AI algorithms based on:
 - Feedback by incorporating it in consumer satisfaction surveys or other feedback loops
 - Performance metrics - develop a set of indicators that you can measure to understand how adoption is going such as error or frustration

Tools to Consider & Monitoring Approaches: HR & Administration

HR & Administration - Administration, Operations, and HR functions involve managing the internal workings of a nonprofit



- Otter.ai - *Transcribes and generates detailed meeting minutes, making it easy to review and share discussions*
- ChatGPT - *Leverage prompts to field guidance on resources for management advice or tough conversation*
- Firefly.ai - *Records, transcribes, and summarizes meetings, providing clear and actionable minutes to streamline follow-ups and decision-making*

- Continuous feedback loop - Implement AI-driven project management tools with continuous feedback from team on efficacy
- Ensure ethical use of AI in HR practices, maintaining fairness and privacy for all employees by anonymizing names and identifying details where possible

- Develop a process to audit note taking tools with attention to missed sections, sensitivity to accents, attribution error, and incorrect summary
- Develop a list for managers on what is permissible to share with AI and what must be redacted



Example

Professional Development Tool for Executives

Inspired by Ethan Malik's research with BCG¹, which has demonstrated that AI can significantly boost performance, Furniture Bank leverages AI copilots and teammates to enhance critical thinking and application skills.

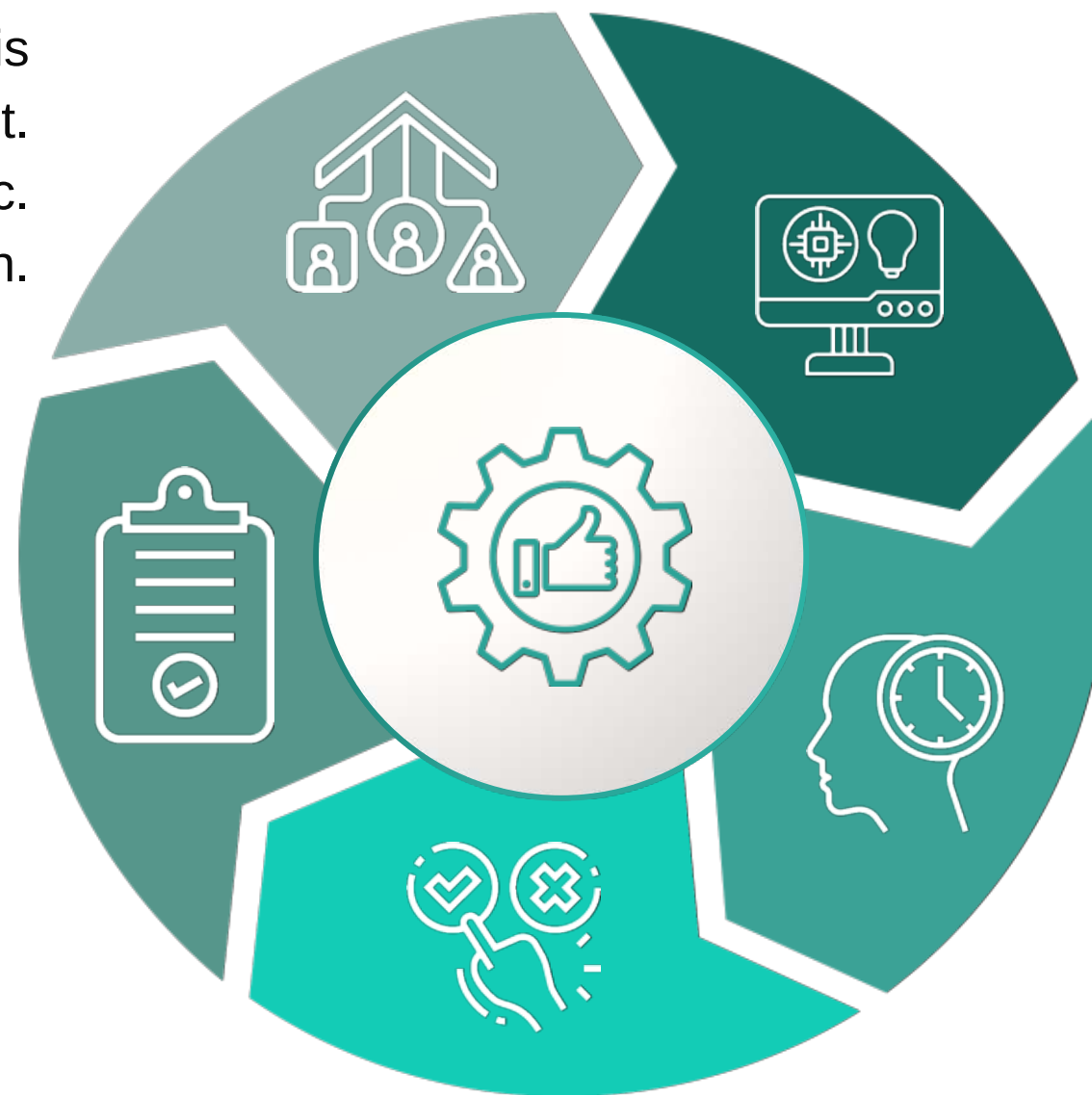
¹Boston Consulting Group

Remember, teamwork, documentation, practice, and patience are keys to making the AI implementation decision

Decide on AI with Diverse Teams At the Table -

Recognize that no one person or role function is best equipped to decide on AI for your nonprofit. Diversity and equity across race, gender etc. supports more inclusive adoption.

Document As You Go - Have your team members document their lessons learned as they go so that other team members can learn from past mistakes and successes.



Practice Prompts - Spend time learning about prompting, most platforms have prompt engineering guidelines to ensure you can get the most optimal results.

Slow is Fast - Encourage the process among leadership of slowing down in initial AI adoption to ensure you are reviewing to ensure PII is not in prompts or if documents uploaded are confidential.

Opt In...or Out - Make a decision about what your organizational practice will be on opting in or out of training models.

THANK YOU!

 <https://www.anbadvisory.com/>