**3 - Deciding on AI**

0:01  
Hi, my name is Rosa Friere, and I'm excited to share more about what your nonprofit might take into account as your leadership decides on incorporating AI into your strategy.

0:11  
This is the third module in our AI and Nonprofit series.

0:16  
Over the past quarter, OFU, Bruce and I have led several community conversations on AI for nonprofits supported by Microsoft.

0:24  
Together, we developed materials providing an overview on AI, overarching principles, this one on how to decide on AI, and exploration of core AI tools, approaches to governance and also privacy.

0:38  
We held community learning sessions combined with a comprehensive scan of existing frameworks.

0:44  
And also we used our lived experience as practitioners and nonprofits to inform our resources, which center policy templates, frameworks, and board talking points to incorporate AI for transformative impact for nonprofits.

0:59  
So now let's delve into AI tools that will help you decide what you want to use for your nonprofit.

1:11  
At the end of this module, you will have a framework to help you decide on AI.

1:16  
I will talk through examples of how nonprofits use AI today, and you will also learn about key tools you can use for areas of your nonprofit.

1:30  
Let's review a simple framework adapted from the work at the Center of Excellence.

1:35  
So whether you are deciding on off the shelf AI technology or you are building custom technology that leverages AI, you want to consider first the impact, the impact on your mission, also the effort, the effort involved in making a change, which also includes time and cost.

1:56  
And also you want to think about fit, how does this fit into your organization and how your organization gets things done, be it your workflow or your infrastructure.

2:10  
So now we will go into a few questions to guide you on your journey.

2:14  
But before I do that, I want to remind you of something that came up during our community sessions.

2:19  
Do not leave your curiosity, innovation and experimentation energy at the door.

2:26  
Yes, you are in a position taking care of your team, your beneficiaries, but you want to balance that with the awe and the wonder of what it could look like.

2:36  
To unleash the possibilities of technology to not just make things like admin less burdensome, but to shine the light of AI to bring about a more just world.

2:47  
OK, but to do that you will need to decide who has ownership over what AI produces because they are taking steps to refine it so it is suitable for your organization and then also how training for your staff will work for new tools.

3:04  
And then finally, but not again, not an exhaustive list, what happens next if something goes wrong, among other things.

3:11  
So let's look at a process to decide and relief.

3:15  
The nonprofit I Co founded recently started using teams and copilot for board meetings.

3:20  
And here's an overview of the process we took to decide.

3:23  
We started first with the problem, then key selection criteria.

3:28  
We looked at what the ultimate outcome would be after we first piloted it.

3:32  
And then we held some discussions at a smaller committee basis about ethics and policy.

3:38  
So our problem was bringing more ease to the documentation process of board meetings for our secretary and organizations.

3:44  
We wanted to have strong customer support and for it to be integrated with video conferencing so that all members could review their contributions to the meeting in real time.

3:52  
It helped with conversation connection, but also transparency of note taking.

3:57  
In smaller committee meetings we talked about consent and how we would manage errors and corrections.

4:03  
In the end, we really benefited from the customer support that made it possible to integrate copilot into our work.

4:13  
And also here is an example of a meeting I had before our annual budget meeting with live notes on the right so you can see exactly how it works in action.

4:26  
Next, I want to share about an example from Giving Tuesday whose mission is to build a world where generosity is a part of everyday life.

4:33  
They followed a similar process when deciding on how to leverage AI to refactor code and for data cleaning.

4:40  
One thing I want to highlight about their process is the care they took during their ethics discussion to develop policies around not using AI when handling data sets with PIII.

4:50  
Think that's a really, really great reflex.

4:53  
Just to show what it might look like in action, here is an example of what it might look like to use ChatGPT to refactor code using DRY.

5:02  
The Do not repeat yourself principle.

5:08  
Another example I want to share is from Move Texas Action fund that works to build power in underrepresented communities.

5:20  
Move, they leverage AI to build a custom GPT that helps with internal program planning.

5:27  
What I love about what came out of their process was some decisions on not just what they would use AI for, IE brainstorming, but also things they would not use AI for, such as policy analysis.

5:39  
And so I just think that's a good reflex to think about deciding not just what to do, but what not to do just so you're being holistic about your process.

5:49  
So throughout this process, we've identified 7 areas where your nonprofit might benefit from exploring the use of AI.

5:57  
This is not an exhaustive list, but it should give you some places to start when deciding on AI.

6:02  
So in each section, we go into the tools that you can explore best practices, and then when considering this use case, how you may want to go about monitoring outputs.

6:13  
Let's explore some of the highlights from these slides, starting with marketing.

6:19  
One of our contributors to our listening sessions really found a lot of use in leveraging chatty BT to transform blog posts into social media length content to amplify the reach of their work.

6:31  
But it all goes back to knowing your voice, so that when content is generated, it's an opportunity to still leverage in house expertise to ensure you don't lose the distinctness of your voice while also providing human review.

6:44  
Because that's really, really important in terms of a monitoring practice.

6:48  
Humans in the Loop is a concept that we continuously return to as we do this work, so look out for it.

6:56  
Next, we want to talk about what it might look like in the context of programs.

7:00  
So I know programs are fast, but one area I'd like to highlight is translation.

7:05  
We know a recent Tech Soup poll showed 17% of nonprofits using tools that support translation like Gemini and other tools.

7:15  
So this is just one of the many platforms that can support your nonprofit's work to ensure linguistic justice in the materials that you distribute.

7:23  
And the monitoring practice of engaging constituents before and after is a great practice here to ensure that native speakers or even people who are speaking the secondary language as a as a second language can share their perspectives about how it's performing in the field.

7:43  
Next, fundraising.

7:44  
We heard so much about this in community sessions and specifically grant writing.

7:49  
Leaders are really feeling that losing their competitive advantage or their voice can be a huge risk when incorporating AI tools into grant proposals.

7:59  
We gathered some really strong suggestions on mitigating that.

8:02  
So one, I think a lot of what we are recommending here is thinking about leveraging AI after the draft has been written with things like line edit revisions for grammar and punctuation, but also sharing the guidelines for a proposal and asking AI to give you a sense of if your draft answered all the questions or if there are areas of improvement.

8:26  
This can lead to more of a diagnostics approach when it comes to grant writing that will also in turn strengthen your development staff's expertise by helping them improve their process and their outputs.

8:38  
The other monitoring area is being mindful about sensitive data.

8:42  
There may be passages you need to remove or data you may have to slightly alter to not not reveal too much strategy, but either way the application of text tools can be especially useful.

8:57  
We are also starting to see more applications of AI to finance.

9:01  
Here we see copilot for finance to support the collections process.

9:05  
Again, these are areas where having humans in the loop really important.

9:09  
You want additional review on emails drafted to others you are engaging for payment.

9:14  
This is going to be good not just to make sure that you have that extra eye, but also for audit and performance and to see what's happening in real time.

9:28  
Another area that came up is search and summary.

9:31  
We know that this is really helpful to nonprofits who are trying to save time and here Anthropic Claude was especially highlighted for providing takeaways from those in depth research reports that are a staple of the nonprofit world.

9:45  
We are also seeing these tools used for Policy Research.

9:49  
We encourage you to be open to these tools as time savers, but to always Fact Check.

9:54  
So if it's policy, go back to the Code of Federal Regulations to make sure that this was summarized correctly and you can track back.

10:02  
And then also seeking feedback from team members with expertise, especially when summary must inform decisions is one of the best practices we would recommend.

10:11  
And here is an example of Claude and Action doing just that to a report, a 44 page report that we're trying to get it to summarize and some of the ways in which it can provide key takeaways.

10:29  
Awesome boil down of the data points.

10:34  
So for customer support, Intercom came up as one of the platforms to help with providing real time support.

10:40  
One call out would be to make sure you are transparent about when someone is talking to a human versus a person.

10:48  
This can help provide a more optimal user experience on both ends.

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And this is also a great example of an area where you can ask for feedback on performance and evaluate it at the end of a certain time period.

11:04  
And finally, our last use case here that I wanted to look at is tool supporting note taking and transcription, but also HR and administrative functions.

11:11  
So you'll see some call outs not just to Copilot, but also Auto dot AI and Firefly dot AI.

11:18  
So AI is the place that leaders sometimes go when thinking about conversation, prototyping or rehearsing a tough feedback conversation, especially for managers.

11:27  
The thing to be aware of here is ensuring you aren't violating privacy and anonymization is used when possible.

11:35  
The monitoring practice here is to develop a list on what should be redacted and what's permissible to share.

11:41  
And I think that's going to be really, really important.

11:43  
But overall, I think you'll see that AI is a professional development tool for executives is something that's really picking up momentum in our field.

11:55  
So some takeaways I would leave you with as you decide on ARR.

11:59  
Don't forget to bring diverse voices to the table when making these decisions.

12:03  
Here I am thinking about race, gender, and other identity markers, but I also recommend including people along the spectrum of tech and digital literacy.

12:12  
I think those have been some really important contributions as even we've been developing this module.

12:18  
It gives everyone an opportunity to level up their skills but also to identify blind spots you might have and thinking about how you might deploy AI in your organization and what training you need to invest in to make sure everyone's brought along.

12:31  
You also want to practice your prompts to get optimal results.

12:34  
Review the guidelines and when in doubt, get specific When you are prompting.

12:40  
Don't be afraid to document as you go and report out to the team your challenges but also your wins.

12:48  
Don't forget about the wins.

12:51  
Think through when you may want to opt in or opt out.

12:55  
There are areas, as a nonprofit leader myself, I want to support training on to increase knowledge in the field.

13:00  
And then there are other areas germane to my organization that I prefer not to leverage for training.

13:05  
But when possible, do what is best for your organization.

13:10  
Remember, slow can be fast.

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The adage in moving fast and breaking things is an outcome you want to avoid.

13:18  
That can set you back in your pursuit of experimentation and impact so you can move slow with AI and keep things intact so that you can build on that momentum more quickly for other areas of work.

13:30  
Thank you so much for listening and I look forward to cheering you on as you decide what is best for you and what is best for your constituencies when it comes to impact.