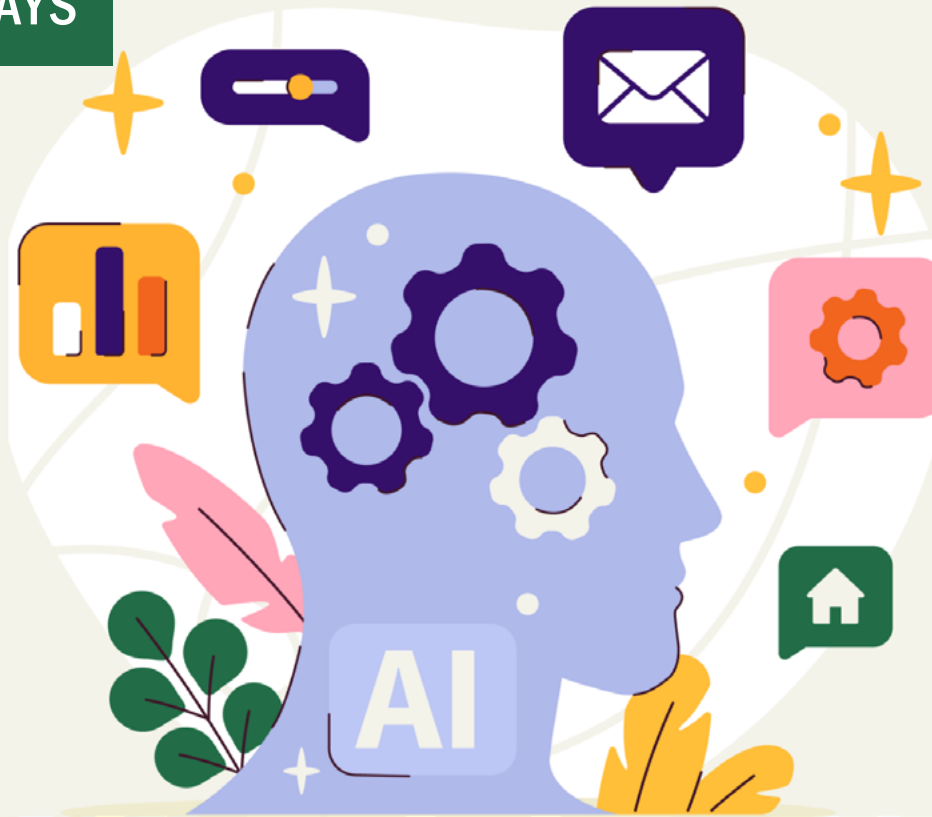


KEY TAKEAWAYS



Using A.I. to Streamline Nonprofit Operations: Advice From Experts

By M.J. Prest

At the dawn of the age of artificial intelligence, nonprofits are beginning to discover its potential to help smooth out many onerous tasks: sifting through resumes, training volunteers, or polishing grant proposals, for example.

But most nonprofits have yet to explore every feature A.I. tools offer. Charity leaders may be missing out on some of the best ways to employ A.I. to optimize not just their productivity but also mission-driven work.

WITH
SUPPORT
FROM



THE CHRONICLE
OF PHILANTHROPY

Actionable Ways to Try AI

In my work leading teams that develop technology products for the nonprofit sector, I have the great pleasure of regularly engaging with nonprofit staff who leverage our solutions. Of late—and not surprisingly—AI is at the center of these conversations. Often, I hear the following sentiment: “AI is suddenly everywhere, and I have no idea where to begin.”

If it's any consolation, this feeling is common. When technology moves this fast, keeping up—let alone staying ahead—can feel like a challenge, especially for teams that are constantly strapped for time and resources. Fortunately, there are many ways to get started, regardless of your learning style.

- **Set your values together:** The often quoted “if you want to go fast, go alone; if you want to go far, go together” is incredibly appropriate in this instance. Many nonprofit staff members I've met have been experimenting with AI on their own, often outside of their jobs. And, if they have begun using it at work, it is often at the individual level. We find that effective adoption occurs when it's a team effort. The first step is establishing the rules of the road—how do you plan to use AI so that it is ethical and true to your organization's values? Our [Responsible AI team has developed a workbook](#) on how to define and guide human-to-AI interactions to help organizations learn how to structure their best practices with new technology, so that you can begin these meaningful conversations and ensure that your practices are reflective of your mission.
- **Take an education break:** This is sometimes the most difficult ask, especially when time is limited. The good news is that there are AI educational materials suited for all kinds of learners. Like to read? Maybe an [AI for Fundraisers Guide](#) is right for you. Is short form video more aligned with your time constraints? Explore our [Tips for Effective Prompts in Copilot](#) (in less than one minute!) No matter what your learning style is, the [Microsoft Digital Skills Center](#) can help support your efforts.
- **Get messy:** I love training, but my favorite way to learn is trying things out for myself. At Microsoft, [Copilot for Microsoft 365](#) is our in-house AI assistant; if I ask Copilot a question, it helps me find an answer. Often, I split my time between creative and analytical projects. Luckily, Copilot can help with both. But to be effective, I had to learn how to ask the right question, better known as a prompt. Start with a small problem you want to solve (perhaps overcoming writer's block to draft a grant proposal) and see how Copilot helps you along the way. If you need a guide, [the Copilot Lab offers some excellent inspiration](#).

We are excited to support you on your AI adoption journey. To begin experimenting with this technology (and leverage our grants to get AI-ready), visit us at microsoft.com/nonprofits.

Sincerely,



Erin McHugh Saif

Chief Product Officer, Microsoft Tech for Social Impact

“A.I. is an opportunity for the nonprofit sector and the social-impact sector to rethink our relationship to innovation,” says Brandolon Barnett, head of innovation and philanthropy at Giving Compass and founder of the Regular App, a small social enterprise. “To really begin to think deeply about what are all the new ways that we can do our work, which will drive more impact.”

Barnett and two other A.I. experts joined the *Chronicle* to discuss how to adopt the technology to streamline operations while managing employee concerns that automation could put their jobs at risk.

The online forum, “Using A.I. to Streamline Nonprofit Operations,” was hosted by Sara Herschander, breaking news reporter at the *Chronicle*. Here are some key takeaways.

Spend time playing with A.I.

Generative A.I. tools are well-suited to help employees increase their productivity, but first leaders and workers need to dedicate time to learning how they work.

The panel discussed some of the most popular chatbots and text generators like ChatGPT, Grammarly, Copilot, Ready to Send, and Zapier, as well as the image and video generators Midjourney, Canva, Steve.AI, and Dall-E 3. Artificial intelligence is also now embedded in many software suites, including Microsoft Office, Chrome, and Zoom.

Nick Cain, director of strategic grants at the Patrick J. McGovern Foundation, recommends leaders take time each day to play around with these tools and familiarize workers with A.I. in low-stakes ways. Executives can lead by example by using these programs regularly to show staff how important it is to learn how they work.

“Modeling the type of exploration and journey that you would like your organization to be on yourself, we think, is a really key component,” says Cain.

For example, you could use A.I. prompts to brainstorm ideas, write first drafts, transcribe interviews, summarize documents, and tweak copywriting, he suggests. Machine learning is also useful for analyzing data or making targeted decisions about programs.

“Getting to know the tools, targeting specific use cases or needs that you think it might be helpful with in your organization,” Cain adds, “is going to lead to much better outcomes.”

Identify A.I.’s strengths and weaknesses.

While generative A.I. is great for content personalization, language translation, text generation, and customer support, it isn’t yet reliable for fact-checking, ethics and morality, or creativity and original thinking, says Barnett.



Ginger Ausloos
*Vice President of IT
Association to Advance
Collegiate Schools of
Business (AACSB)*



Brandolon Barnett
*Head of Innovation and
Philanthropy, Giving Compass
Founder, The Regular App*

Giving Compass uses A.I. to advance its mission in donor education, he says, by organizing its vast database of nonprofits and helping visitors to its website learn about causes in a way that is more streamlined and natural. “You can ask to find a charity by just knowing that you care about supporting women and girls’ STEM education, rather than having to know the name of the charity or the [employer identification number],” Barnett says.

Charities in a variety of sectors have already been able to harness the technology’s power effectively. Relief organizations have begun to use A.I. as a customer-service tool to collect data on immediate community needs following a disaster. Some community development financial institutions have deployed it to create personalized training materials for clients like minority-owned businesses on topics the nonprofit’s staff members may not know enough about.

It’s important to remember that nonprofits and businesses are in the same boat. A.I. is the future of operations, and it is evolving rapidly, says Barnett. All organizations will have to become more familiar with how the technology is best applied in marketing, finance, and human resources.

“These technologies are going to eventually be embedded into everything,” Barnett advises. “They’re a new way to search and organize information.”

Prepare for a culture change.

Leaders ought to dedicate resources to making their staff members feel safe and secure in adopting this new technology, says Ginger Ausloos, vice president of IT at the Association to Advance Collegiate Schools of Business.

Delegating tasks to A.I. means resetting traditional job expectations and transforming how employees spend their time at work. Not everyone will feel equally comfortable with this evolution or readily accept changes to how things have always been done, Ausloos says. But reassurance must come from the top.

“You are developing that growth mind-set and it’s a culture transition,” she says. “Beyond the tech, it’s that culture change in the organization that we’re seeing that is transformational. We’re leveraging it at a pace that the staff is comfortable with.”

By handing off more mundane tasks to chatbots, staff members can focus their attention on higher-skill responsibilities, which can help increase their job satisfaction.

“Speak about that [to staff] so that they understand that they are growing and leveraging these technologies,” counsels Ausloos. “It will take the fear and the stigma away from it.”

Simultaneously, boards may see A.I. as an opportunity to cut operating costs and, potentially, jobs. Leaders should instead advocate for the use of automation to increase staff wins, not decrease staff size.



Nick Cain

*Director of Strategic Grants
Patrick J. McGovern Foundation*

Because charities are by definition not profit-driven, the benefits of adopting A.I. will come primarily from enhancing effectiveness and expanding their impact.

Barnett describes a situation in which instant translation services powered by A.I. could enable collaboration with international partners who don't speak English. "That presents an incredible opportunity to me that I find exciting even though, yes, there are these real-world consequences that we need to think very deeply about," he says.

Tailor your A.I. policy to your organization.

Once both staff and leaders are comfortable with A.I. programs, they can then start to develop policies to test ideas and govern the technology's usage.

There isn't a one-size-fits-all template, Cain says, because each charity should create an A.I. policy that is customized to its specific needs. However, he offers some standard guiding principles.

When your nonprofit's members or program participants are on the receiving end of generative A.I., Cain says, you should place a higher level of scrutiny on what the technology is producing. For example, carefully review how a customer-service chatbot on your website is responding to your clients to ensure it is appropriate.

Second, listen to your staff about how they would like to incorporate A.I. tools into their work responsibilities and where the technology might be valuable, he says, and then gauge which tasks make the most appropriate use of it.

Cain recommends using a "stoplight" scoring approach to judge how much oversight content generated by A.I. requires. Green would indicate total comfort with releasing the output to the public with only minimal oversight. Yellow would allow for experimentation but require an expert to weigh in before the information can be made public. Red would identify uses that should be forbidden.

That leads to his third point: Never put private or confidential information about your organization into chatbots. Also exclude any data that is personally identifiable about program participants.

"The closer the outcome is to the member, the more scrutiny," agrees Ausloos, who also recommends having an updated data-privacy policy to share with everyone who engages with a charity's services.



Sara Herschander

Breaking News Reporter
Chronicle of Philanthropy