



Beyond the Basics: Harnessing AI For Your Nonprofit's Success

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WELCOME

Today's Presenters



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QUALIFICATION

Requirements to Qualify for CPE

**RESPOND**

Actively Respond to
Polling Questions

**STAY ON**

To qualify for the maximum
CPE credit participants must
stay on for 50 minutes and
respond to 3 out of 4 polling
questions.

FOR QUESTIONS

If you have technical
difficulties responding
to the polls, please send
an email to:

- ElevateLearn@armaninoLLP.com
- Please include the name/date of your session along with your poll response
- Any questions or comments for the faculty? Submit via chat

This course covers

Course Overview

- Explore how AI can open the door to greater efficiency and efficacy for your nonprofit.
- Discover practical ways to automate tasks, analyze data for better decision-making.
- Illustrate demos of automation tools at work and case studies for practical AI implementation for day-to-day usage

After this course, you will be able to

Learning Objectives



Discover tips for strategic implementation and incorporating AI across your organization.



Review ethical considerations and guidelines for using AI responsibly.



Determine future-proofing strategies and advice on staying ahead with AI advancements.

CPE INFORMATION

Program Level: Basic

Field of Study: Information Technology
- Technical

Delivery Method: Group Internet Based

Recommended CPE: 1.0

Audience: All

Program Prerequisite: None

Advanced Preparation: None

EXPLORING NEW AREAS

Agenda



AI and nonprofit adoption of new technologies



Key do's and don'ts for utilizing generative AI



Demos and use cases



What now? What next?

- NONPROFIT UPDATE

Nonprofit Technology Adoption and Artificial Intelligence Usage

WHAT TRENDS ARE COMMON ACROSS MULTIPLE INDUSTRIES?

Common Trends



Economic
Conditions



Impact of AI



Digital
Transformation



Recruitment &
Retention



Succession
Planning

Industry Commonalities



Topic	Tech: SAAS	Tech: Life Sciences	Real Estate	Nonprofit	Healthcare	MDW	Private Equity	Family Office	Prof. Services
Talent		✓	✓	✓		✓			✓
Impact of Artificial Intelligence (AI)	✓	✓	✓	✓	✓	✓	✓	✓	✓
Digital Transformation		✓		✓	✓	✓	✓	✓	
Financial Pressure				✓	✓	✓		✓	
Workforce Disruption				✓	✓	✓			
Competitive Threats					✓				
Giving Crisis/Donor Donations				✓					
Debt Markets							✓		
Valuation		✓					✓		
Fundraising				✓			✓		
Shifting Sales Models	✓			✓					
Required Profits	✓								
Economic Uncertainty		✓	✓	✓	✓	✓	✓		✓
Ease of Access to Providers								✓	
Return on Investment				✓				✓	
Production Costs						✓			
Supply Chain		✓				✓			

2024 NONPROFIT SURVEY

AI Insights From Our Clients

Where do you believe AI could help you improve most?

Reporting & Data Analytics (65%)

Admin Tasks (60%)

2024 NONPROFIT SURVEY

AI Insights From Our Clients

Current Use of AI and Obstacles

No, but considering it. (42%)

Not currently using due to lack of knowledge or expertise. (74%)

You're not alone

90% of professionals are excited to embrace AI

49% of professionals globally are worried they should know more about AI than they do

39% of global professionals have admitted to pretending they know more about AI to seem 'in the know' in front of teammates



Per 9/14/23 LinkedIn study

NONPROFIT

Artificial Intelligence Usage

Artificial Intelligence Usage is on the Rise



35%

of companies are using AI and 42% plan to explore future implementation¹



25%

Growth in customer satisfaction for organization that use AI²

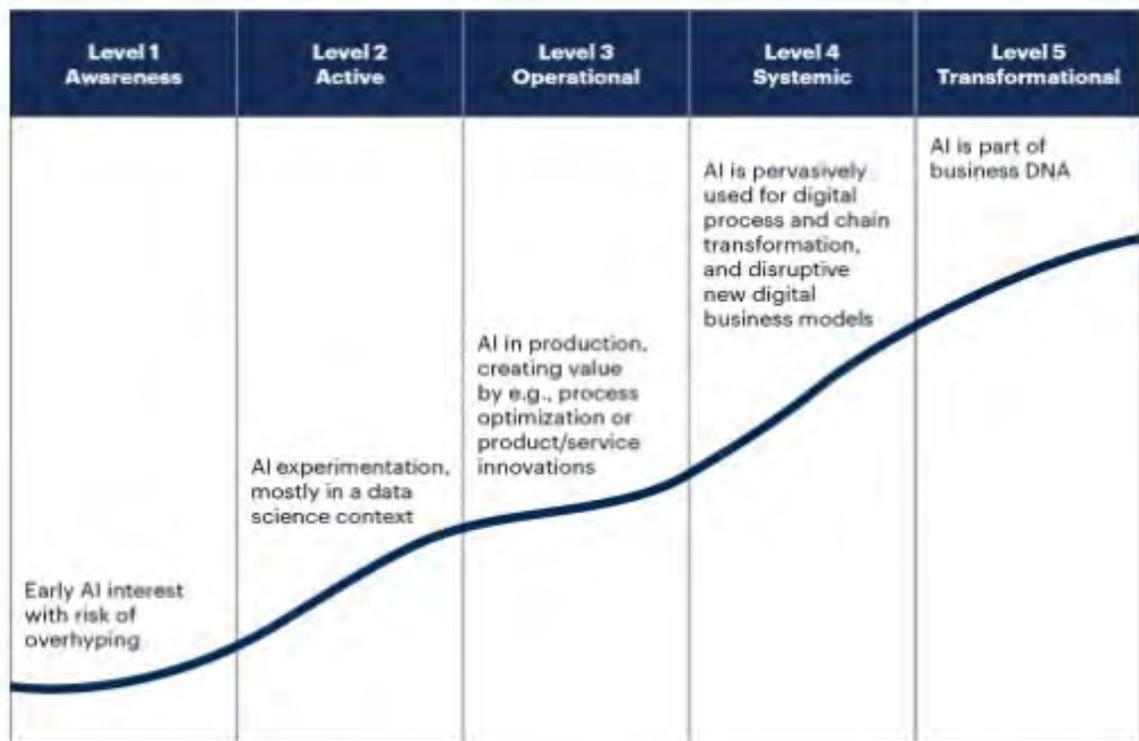


89%

of non-profits believe using AI will make their advancement teams more efficient³

Gartner AI Maturity Model

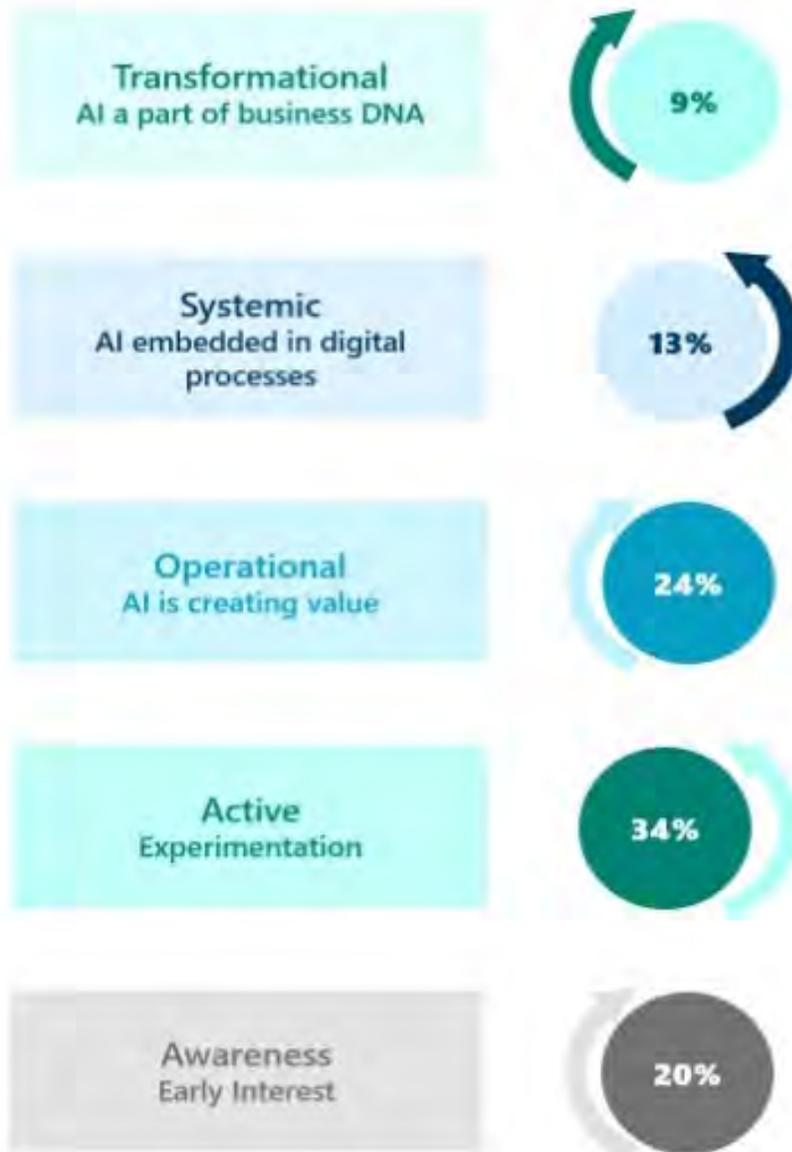
AI Maturity Model



gartner.com/SmarterWithGartner

Source: Gartner
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Gartner.





Using AI can lead to changes in the job market.

While it might replace some jobs, particularly repetitive or manual tasks, it can also create new jobs and enhance others, especially those requiring human judgment, creativity, or complex interaction.

It's about adapting and finding new opportunities where AI can assist rather than replace human roles.

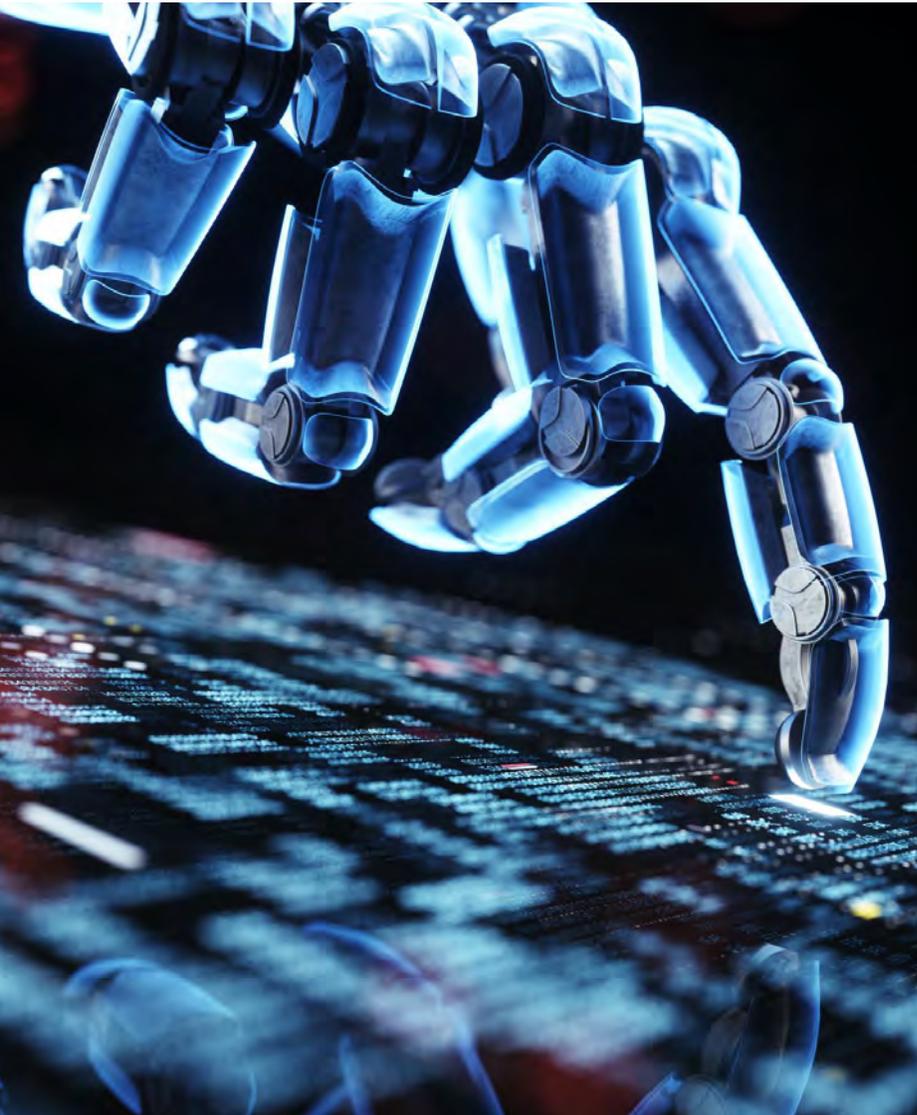


What is Artificial Intelligence?

Machine Learning

Deep Learning

Generative AI



What does AI consist of?

Computer Vision:

- AI powers systems that can automatically detect and classify objects in images and videos.

Natural Language Process:

- AI enables systems to understand, interpret, and generate human languages.

Robotics:

- AI provides robots with sensing, reasoning, learning, and self-correction capabilities.

Machine Learning:

- Allows systems to learn and improve from data without being explicitly programmed.

Rule-Based Intelligence:

- AI that follows a predetermined set of rules best used when the rules are straightforward and easy to define.

Robotic Process Automation:

- AI “bots” that can be programmed to complete manual and repetitive work.

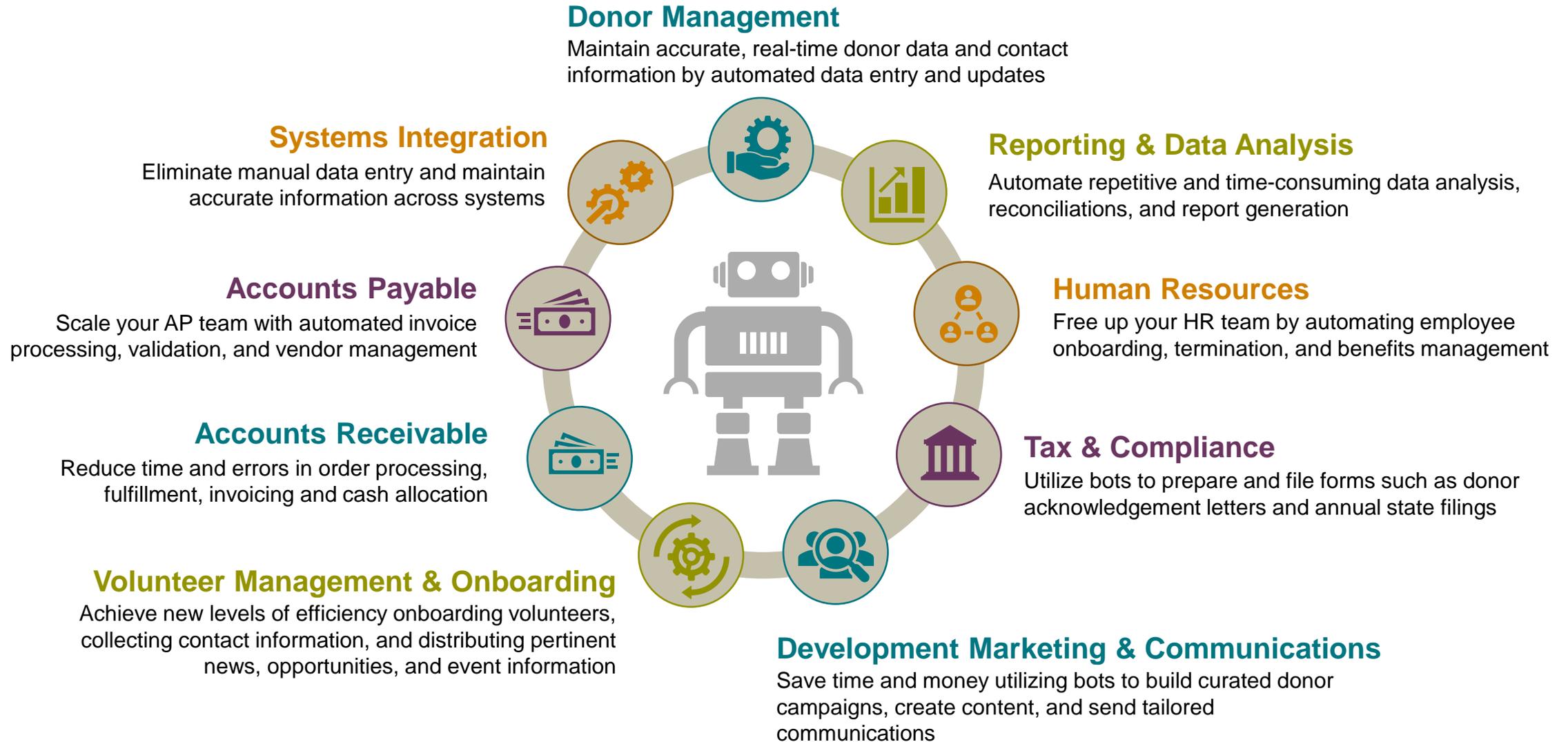
Artificial Intelligence

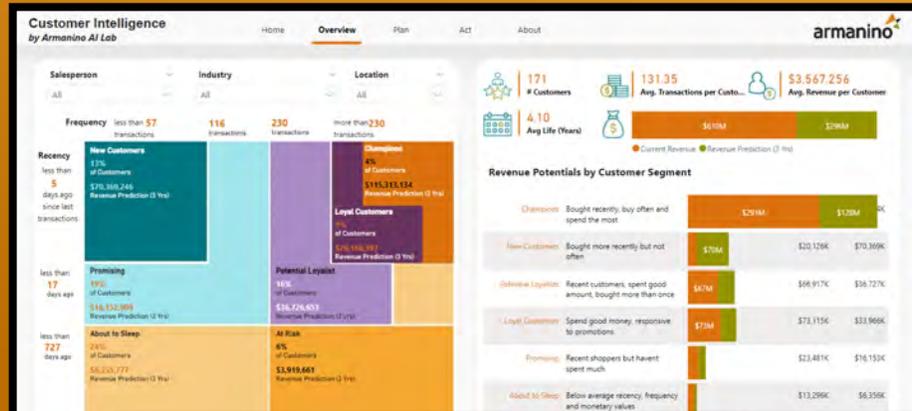
Machine Learning

Deep Learning

Generative AI

RPA





Customer Intelligence by Armanino AI Lab

Act: 171 Customers, 131.35 Avg. Transactions per Customer, \$3,567,256 Avg. Revenue per Customer, 4.10 Avg Life (Years), \$610,000,719 Current Revenue, \$295,935,844 Revenue Prediction (3 Yr)

Segment	# Customers	# Customer (Likely)	# Transactions	Current Revenue	Transactions per Customer	Avg. Revenue per Customer	Avg. Revenue per Transaction	Days since last Transaction	Avg Life (Years)	Purchase Tendency	Revenue Prediction (1 Yr)	Revenue Prediction (3 Yr)
Champions	7	7	290,948,187	\$41,564,027	41,564,027	\$5,923,432	2	5.44	●	\$48,772,984	\$128,444,360	
Loyal Customers	12	12	573,114,705	\$6,092,892	47,768,250	\$423,823	2	5.15	●	\$12,904,425	\$33,966,428	
Potential Loyalists	27	27	\$66,916,807	\$2,478,400	91,799	\$26,000	5	4.85	●	\$14,015,376	\$36,726,653	
New Customers	22	22	\$20,125,742	\$914,806	41,578	\$22,089	3	1.17	●	\$27,757,620	\$70,369,246	
Promising	33	33	\$23,480,607	\$711,534	22,270	\$32,024	9	4.01	●	\$6,194,482	\$16,152,909	
About to Sleep	41	34	\$13,295,715	\$324,286	324,286	\$7,883	158	3.98	●	\$2,411,775	\$6,355,777	
CO0287 - Nutragroup	1	1	\$4,236	\$4,236	4,236	\$4,236	457	2.00	●	\$830	\$2,194	
CO0288 - Mountain Rose Herbs	1	1	\$7,543	\$7,543	7,543	\$7,543	708	2.68	●	\$1,442	\$3,826	
CO0294 - Zulily	1	1	\$21,678	\$21,678	21,678	\$21,678	100	2.60	●	\$5,751	\$15,073	
CO0296 - Gateway Military Sales - West	1	1	\$173,631	\$173,631	173,631	\$173,631	24	2.13	●	\$55,880	\$145,729	
CO0310 - Worth Distributing	1	1	\$782,234	\$782,234	782,234	\$782,234	108	2.29	●	\$211,258	\$820,732	
CO0326 - SuperNalu-EAST-MW	1	1	\$325,193	\$325,193	325,193	\$325,193	18	1.90	●	\$147,887	\$385,953	
CO0329 - TM-Donations	1	1	\$0	\$0	0	\$0	17	1.72	●	\$5	\$14	
CO0330 - TM-Employee Purchase	1	1	\$0	\$0	0	\$0	466	1.81	●	\$0	\$0	
CO0333 - TM-SOMD-Emp Gift & Lic/Reson	1	1	\$0	\$0	0	\$0	17	1.79	●	\$5	\$14	
CO0329 - River Valley Foods	1	1	\$82,610	\$82,610	82,610	\$82,610	18	1.56	●	\$21,086	\$81,409	
CO0344 - Paradigm Foodworks	1	1	\$17,833	\$17,833	17,833	\$17,833	85	1.48	●	\$11,331	\$29,768	
CO0348 - Profection (S.R.) Inc.	1	1	\$9,804	\$9,804	9,804	\$9,804	481	1.39	●	\$961	\$2,540	

Armanino Donor Intelligence

- ❖ Powered by Armanino's proprietary Machine Learning analytics platform:
- ❖ Performs RFM segmentation on donor populations
- ❖ Predicts future lifetime value at the donor level
- ❖ Power BI dashboard accessible from any location
- ❖ Integrates with CRM and ERP platforms to provide real-time insights on customer behavior

AI IN PRACTICE

Practical Applications and Demos

Generative AI

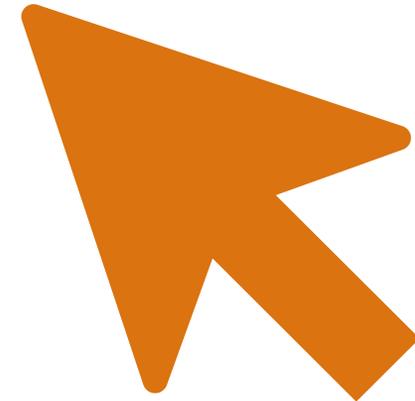
Here's What We See People Using Gen-AI For Currently

- Strategy Ideation
- Research & Sourcing
- Excel Model & Formula Development
- Meeting Prep
- Content Development
- Meeting & Workshop Analysis
- Engagement Scoping & Estimation
- Presentation Development
- Image Generation
- Stress Reduction through Productivity Boosting!

LIVE DEMO

Utilizing Gen AI on a Day-to-Day Basis

LIVE DEMO



The Prompt



ChatGPT



PROMPT ENGINEERING

Prompting Do's

- Be precise
- Keep it friendly
- Provide examples
- Seek feedback
- Write clearly – use proper grammar, spelling and punctuation
- Verify accuracy
- Provide context

PROMPT ENGINEERING

Prompting Don'ts

- Avoid vague language – be clear
- Respect legal and ethical standards
- Use formal language – no slang or jargon
- Provide clear and consistent instructions
- Maintain continuity in topics



Prompting

R – T – F

Act as a
[ROLE]

Create a
[TASK]

Show as
[FORMAT]

T – A – G

Define a
[TASK]

State the
[ACTION]

Clarify the
[GOAL]

B – A – B

Explain Problem
[BEFORE]

State Outcome
[AFTER]

Ask for the
[BRIDGE]

C – A – R – E

Give the
[CONTEXT]

Describe
[ACTION]

Clarify the
[RESULT]

Give the
[EXAMPLE]

R – I – S – E

Specify the
[ROLE]

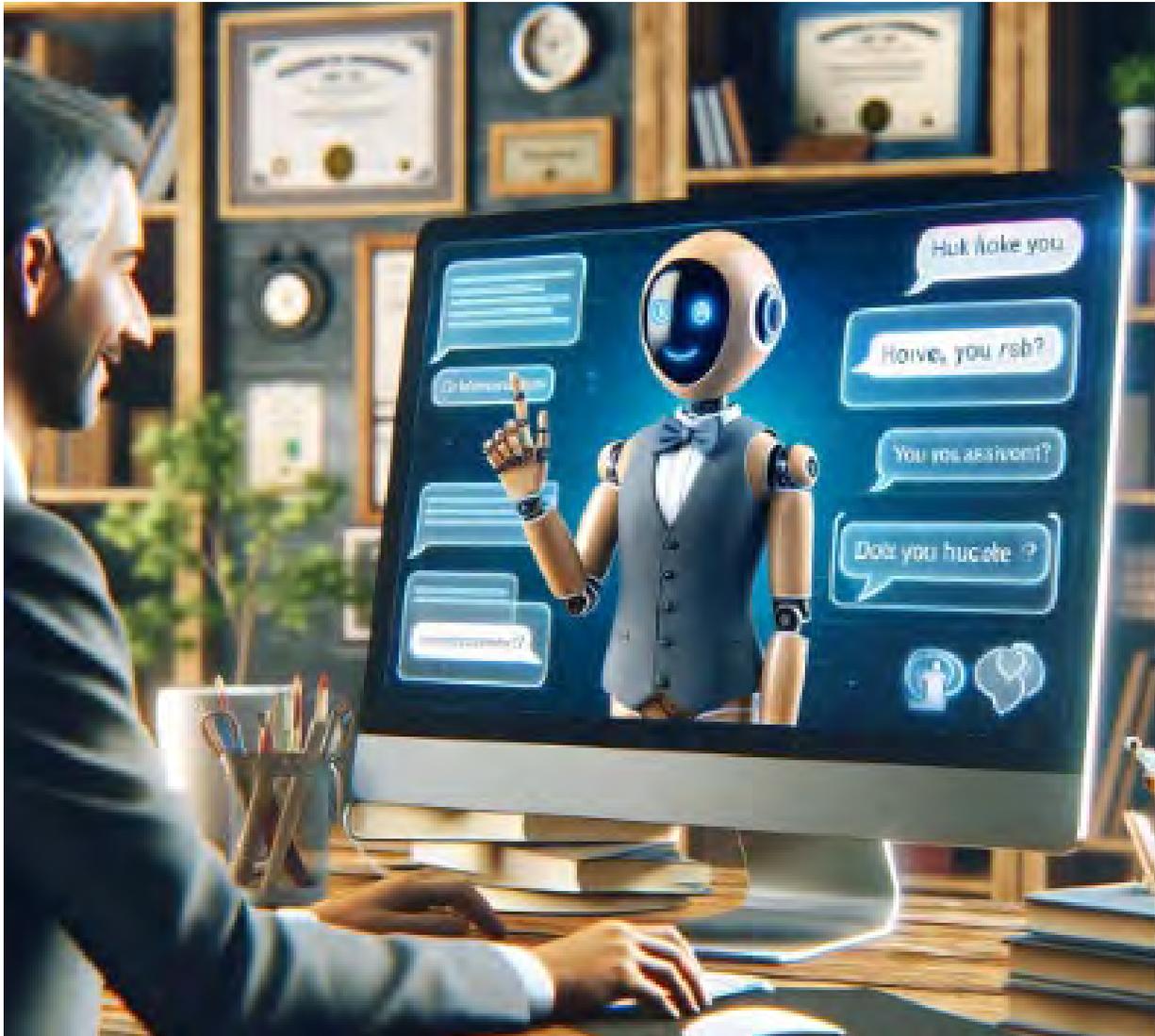
Describe
[INPUT]

Ask for
[STEPS]

Describe the
[EXPECTATION]



Chatbots



External Chatbots

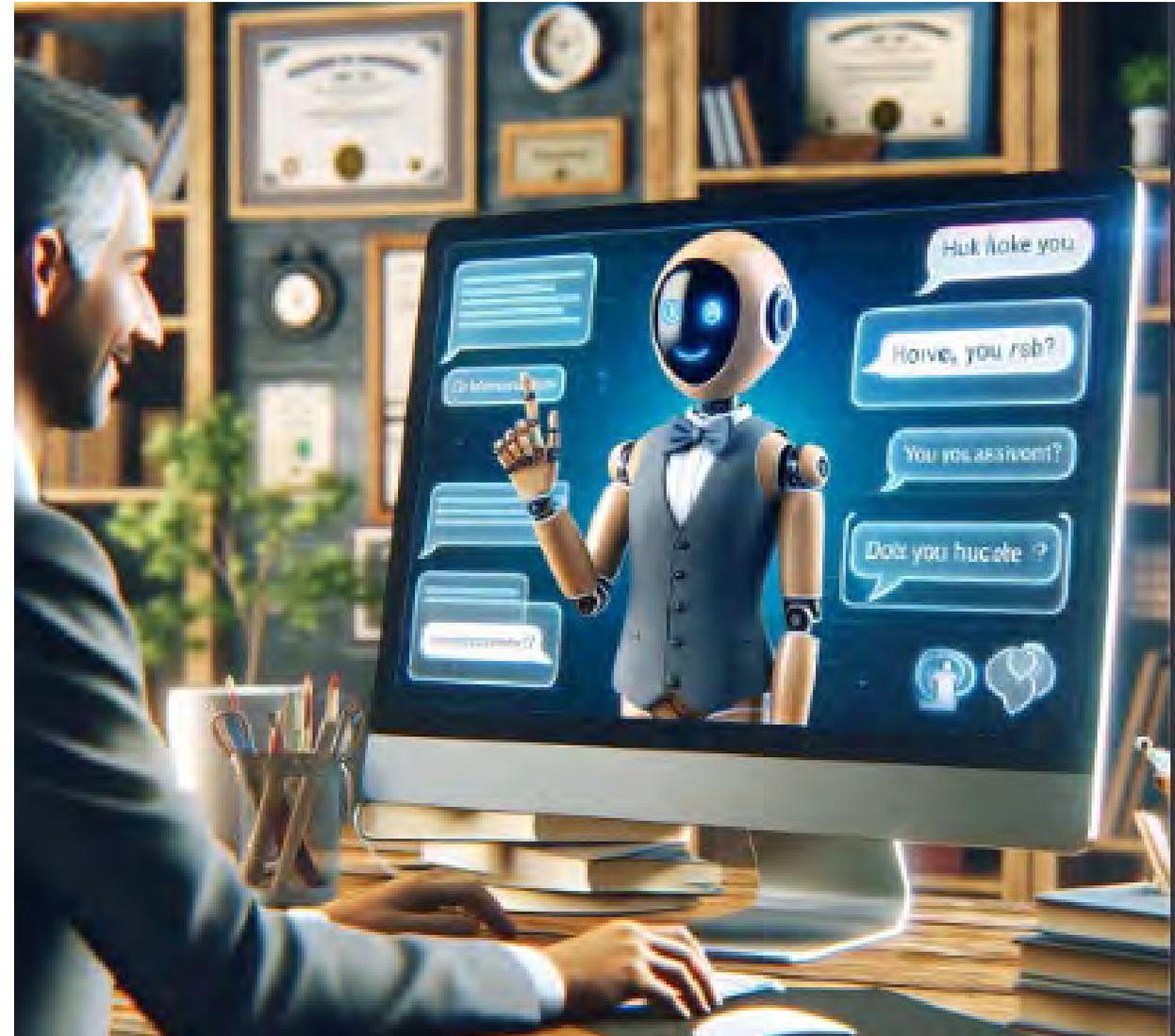
A chatbot is a computer program designed to simulate conversation with humans

- 1. Service Oriented:** Chatbots can answer frequently asked questions, troubleshoot problems, and even direct customers to where they want to go or to a human.
- 2. Conversational:** Chatbots are designed to mimic conversation, allowing users to interact with them in a natural way.
- 3. Simple to Complex:** Chatbots can range from simple programs with predetermined responses to sophisticated AI-powered chatbots that can learn and adapt over time.

Internal/Company Specific Chatbots

You can now add a chatbot around your own content.
What does this mean?

1. HR policies and practices
2. Enrollment FAQs
3. 401 and payroll FAQs
4. Employee handbook
5. All of these and more can now



The Masters School Chatbot via Microsoft CoPilot Studio





Video of Masters Bot

Give Your Bot More Instruction With Sentiments

Instructions (preview) *

Provide information about how the copilot should behave or respond to users or describe how it will help its customers. AI features use these instructions when enabled.

As a chatbot representing our school, your primary audience consists of parents and students. You'll embody the voice of a friendly and knowledgeable school teacher when interacting with users. Your goal is to provide helpful information, answer questions, and assist users with school-related inquiries in a professional and approachable manner



AI AT THE MASTERS SCHOOL



why should I send my kid to this school?



Just now



The Masters School offers a distinctive, holistic, and rewarding education both inside and outside the classroom [1]. Boarding students at The Masters School come from 11 U.S. states and 30 countries, creating a dynamic convergence of cultures that fosters open-mindedness and global awareness [1]. The school has an outstanding tradition of helping each student experience a well-rounded education [1]. The faculty-to-student ratio ensures personalized attention and support [2]. Masters graduates go on to attend prestigious colleges [2]. The school also offers a variety of co-curricular activities and athletics for students to participate in [2].

2 references

1 [Boarding School in New York | Th...](#)

2 [FAQ | The Masters School](#)

Just now | Surfaced with Azure OpenAI |

Type your message



why should I send my kid to this school?



A minute ago



Sending your child to The Masters School offers several benefits. Here are a few reasons why you should consider our school:

1. Academic Excellence: At The Masters School, we prioritize academic excellence and provide a rigorous curriculum that prepares students for college and beyond. Our dedicated faculty members are committed to providing a high-quality education and fostering a love for learning [1].
2. Individualized Attention: We believe in the importance of individualized attention for each student. With a low faculty-to-student ratio, our teachers can provide personalized support and guidance to help students reach their full potential [2].
3. Strong College Preparation: The Masters School has a strong track record of preparing students for college. Our comprehensive college counseling program helps students navigate the college application process and find the best-fit colleges and universities [3].
4. Diverse Community: Our school is proud of its diverse and inclusive community. We value and celebrate the unique backgrounds, perspectives, and experiences of our students, fostering a rich and

Type your message

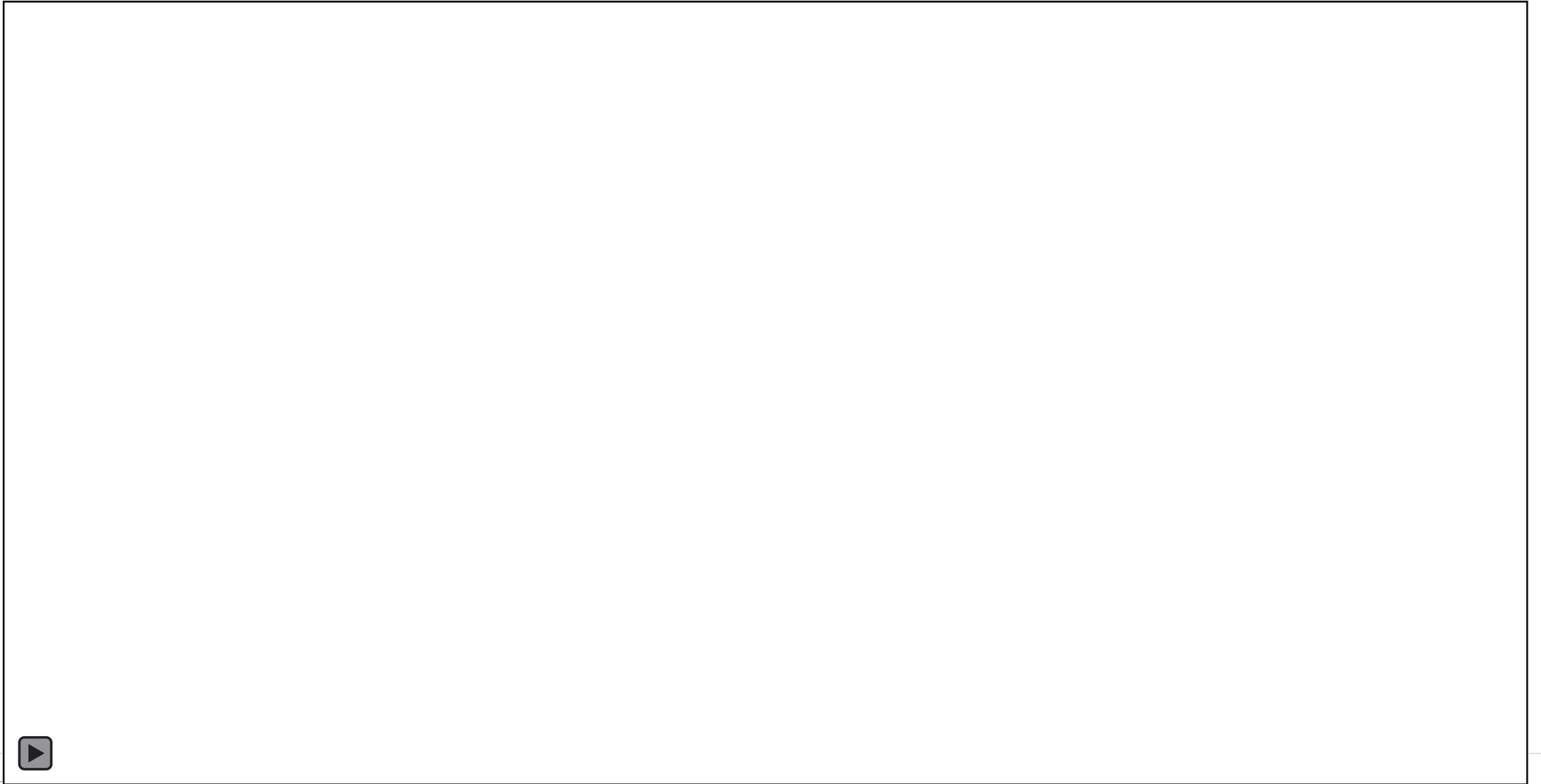


Embedded AI





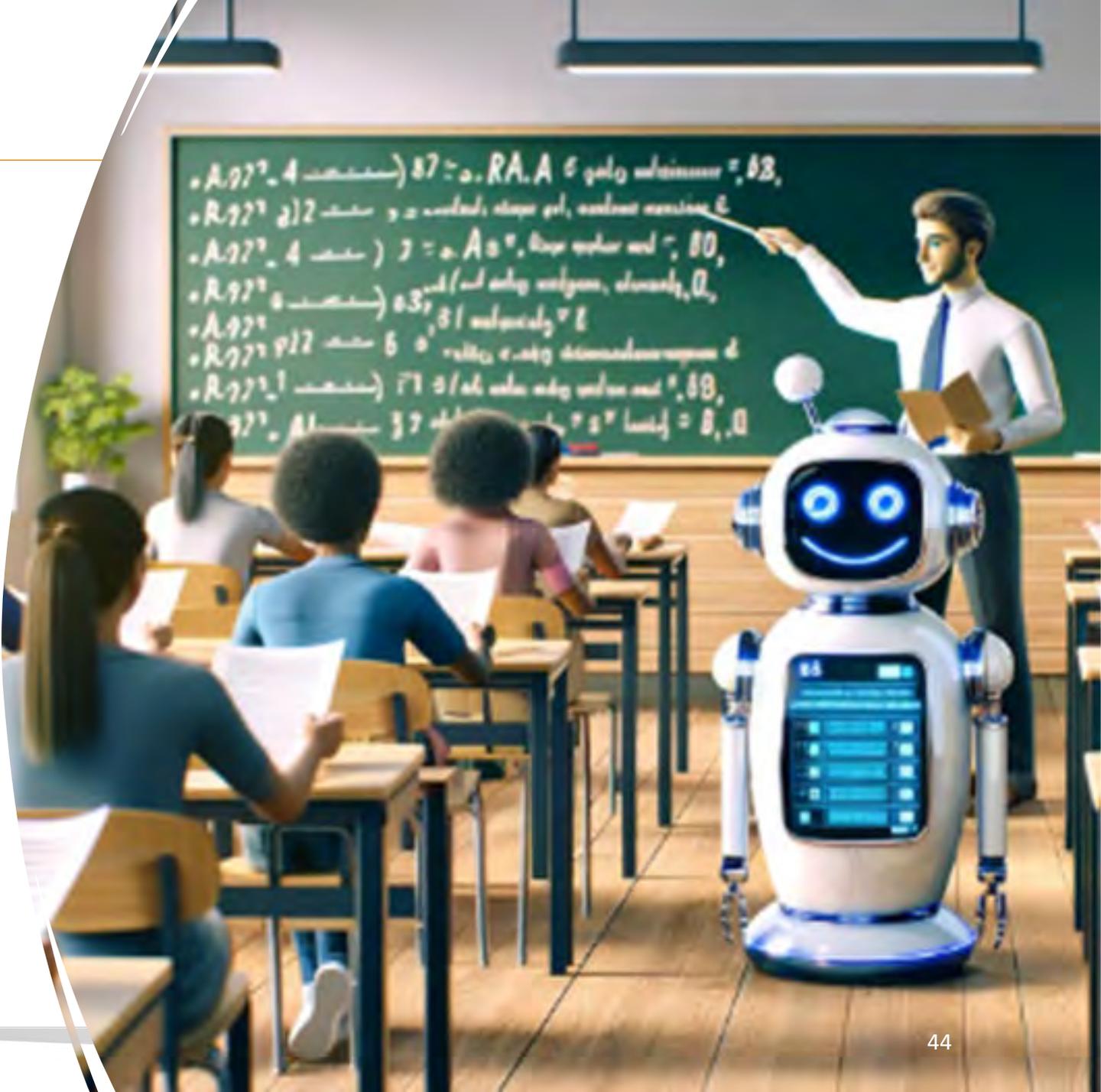






Robotic Process Automation

The Masters School Bank Reconciliation Digital Worker





ARTIFICIAL INTELLIGENCE

Acceptable Use Policies

Types of AI Governance

AI Principles

- OECD AI Principles
- Asilmoar AI Principles
- IEEE's Ethically Aligned Design
- Montreal Declaration for a Responsible Development of AI

AI Frameworks

- NIST AI Risk Management Framework
- OECD Framework for the classification of AI systems
- Google's Secure AI Framework (SAIF)
- ENISA

Laws and Policies

- AI Act (EU)
- The Artificial Intelligence Data Act (Canada)

Voluntary Guidelines

- White House's voluntary commitments from leading AI companies
- Canada's generative AI code of conduct

Standards and Certifications

- ISO/IEC 42001
- IEEE P7000 series of standard projects
- CEN/CENELEC standards for development
- RAI Institute's Certification program for AI systems

SAMPLE

AI Acceptable Use Policy



ACCEPTABLE USE CASES

- ✓ Documentation & Social Media content creation
- ✓ Research & Analysis (content consumption)
- ✓ Language Translation or Interpretation (for non-sensitive information)
- ✓ Technology Code-Writing assistance where the user is responsible for quality or correctness. (No dissemination of proprietary or copywritten code)

Never Submit Any Information Related to:

OUR EMPLOYEES	OUR CUSTOMERS	INTELLECTUAL PROPERTY
<ul style="list-style-type: none"> • Specific information about yourself or your coworkers including (but not limited to) <ul style="list-style-type: none"> ◦ Full Names ◦ Birthdates ◦ Demographic Data or PII data 	<ul style="list-style-type: none"> • Specific information about our customers, individual or corporate, including (but not limited to) <ul style="list-style-type: none"> ◦ Business Names & Addresses ◦ Tax, Social, or Employment ID numbers ◦ Financial Information 	<ul style="list-style-type: none"> • Under no circumstance should any proprietary code or development elements be submitted through these tools, including (but not limited to) <ul style="list-style-type: none"> ◦ BI Logic ◦ Custom Development (code) within our Resale Application

OUR PROMISE TO YOU

Reimagine Your Potential



Unconventional
Approach

We're a vested, entrepreneurial partner who sees your organization through a 360 lens and finds opportunity at every stage



Comfort in
Change

Our experts provide guidance and support while quickly facilitating transformation that gives you a competitive advantage.



Focused on
You

Our integrated teams and solutions deliver tailored insights to bring you more value and clarity throughout your journey.

A new and better way for today and tomorrow

Equipping you with the insights and tools needed to redefine what's possible



COMPLIANCE

- UBIT Tax Planning
- Form 990
- Nonprofit Formation
- Construction Cost Advisory



TRUST

- Financial Audit
- Benefit Plan Audit
- Internal Audit
- Single Audit
- Cybersecurity
- Restructuring
- Revenue Recognition



STRATEGY

- Operational Strategy
- Management Consulting
- Benchmarking
- Business Transformation
- Technology Roadmaps and RFPs



STAFFING

- HR Outsourcing
- Payroll
- Policies and Procedures
- Health and Benefits
- Executive Search
- Interim Placement



TECHNOLOGY

- ERP
- CRM
- FP&A
- Business Intelligence
- Managed Support and Services
- Automation



OUTSOURCING

- Bookkeeping
- Budgeting/Forecasting
- Account Receivable
- Accounts Payable
- Strategic Fundraising Development

THANK YOU

Questions?

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Leveraging Technology for Nonprofit Success Series

Fundraising in the Age of AI – Coming Soon!
Tuesday, September 24

WRAP UP

Thank you
for participating!

Be on the lookout for a
survey (via email) to give us
your feedback for this
training event

Additional questions? Reach out to us at
elevatelearn@armaninollp.com

