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AI for Social Good Playbook

A Resource Guide Designed for Nonprofits, Beneficial for All Businesses

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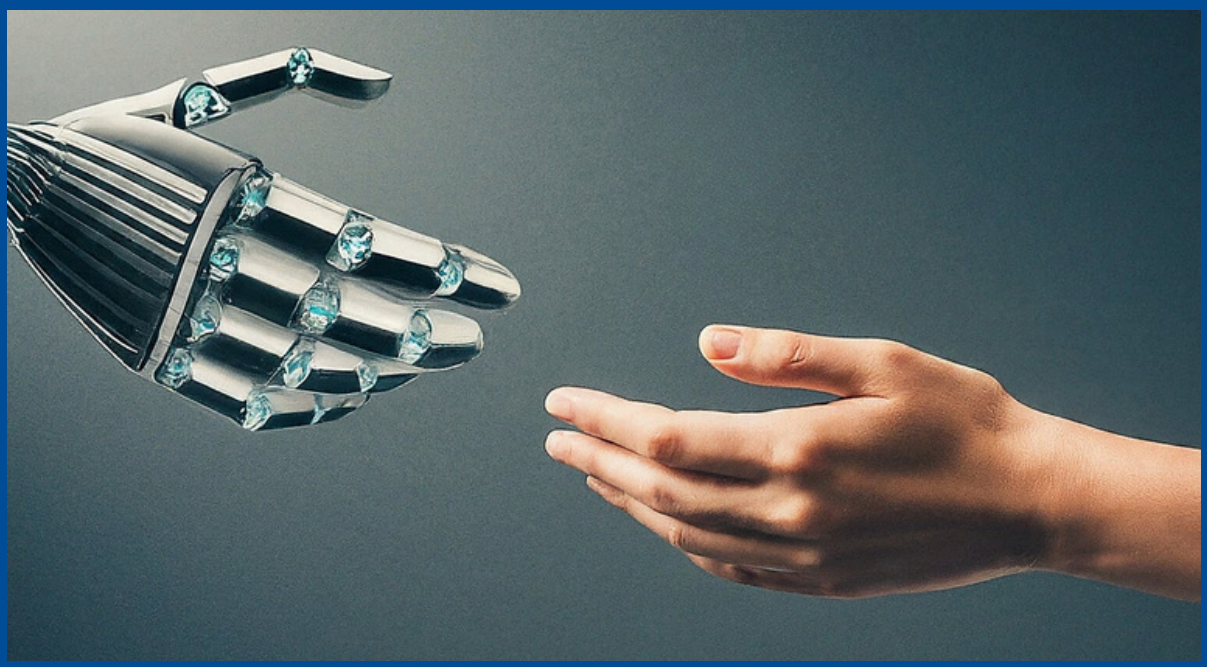
18 Appendix: More examples of Prompting

***Tip -** Table of Contents created in 5 seconds using Microsoft Copilot using this prompt: "create a table of contents for this document" (attach document)*

Why is Artificial Intelligence (AI) Important for Nonprofits?

AI enhances human capabilities and can help improve productivity in organizations. It can reduce the time spent on many operational processes and functions. There are many examples of how AI can support and save you time with daily tasks, which we will share.

By leveraging AI technologies, nonprofits can optimize their operations, enhance their impact, and better fulfill their missions in the communities they serve. A recent survey performed by AI Compass stated that 31% of nonprofits are starting to use AI.



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Generative Artificial Intelligence Explained

Generative AI is a subset of artificial intelligence that leverages machine learning techniques to generate data. Think of machine learning as a computer being taught to recognize common patterns to make decisions, like how humans learn. The data it produces can be in various forms such as text, images, music, code, or other types of content.

HERE'S A MORE DETAILED EXPLANATION:

1 WHAT IT DOES:

Generative AI models are capable of creating new content that is similar to the data on which they were trained. For example, if a generative AI model is trained on a dataset of paintings, it can create a new painting that is stylistically similar to those in the training set.

2 HOW IT WORKS:

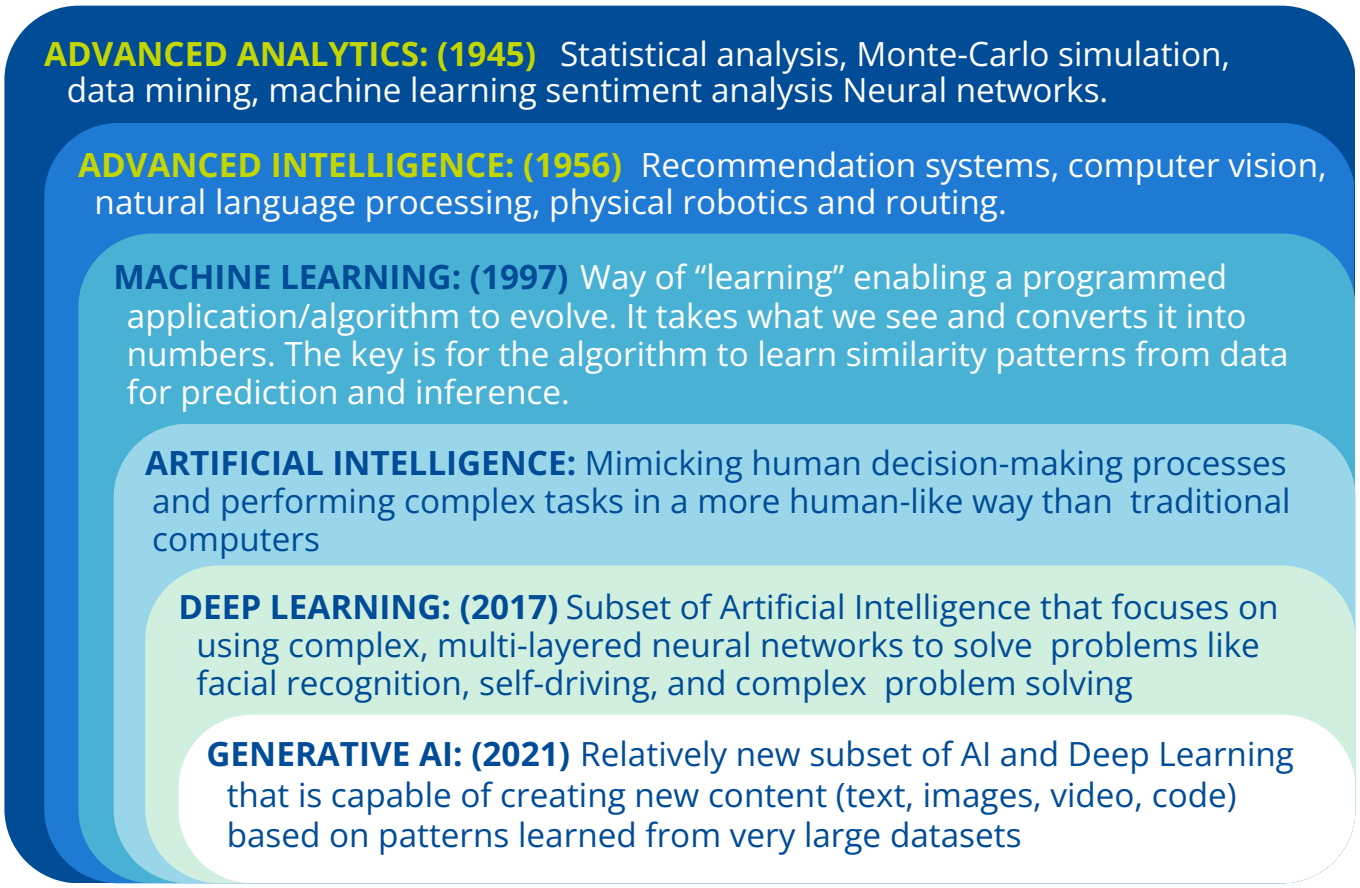
Generative AI models use this learned knowledge to generate new data. The generation process often involves randomness, which ensures that the generated content is not just a copy of the training data but is instead a novel creation.

3 APPLICATIONS:

Generative AI has a wide range of applications, including creating art, composing music, writing text, creating realistic human faces, and more.

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History of Artificial Intelligence



ADVANCED ANALYTICS:

Quantitative, computational, and statistical analysis of data beyond that of traditional business intelligence (BI).

MACHINE LEARNING:

Uses data and algorithms to learn from patterns in data, gradually improving accuracy and allowing models to generalize beyond explicitly programmed cases. This may be human-in-the-loop or autonomous. There are typically phases of exploring possible behaviors and exploiting the most successful ones.

ARTIFICIAL INTELLIGENCE:

The science and engineering of building computer systems that can perform tasks usually done by humans. More than computation, these tasks typically involve gathering or sensing inputs, making decisions, and the results impacting people and the physical world.

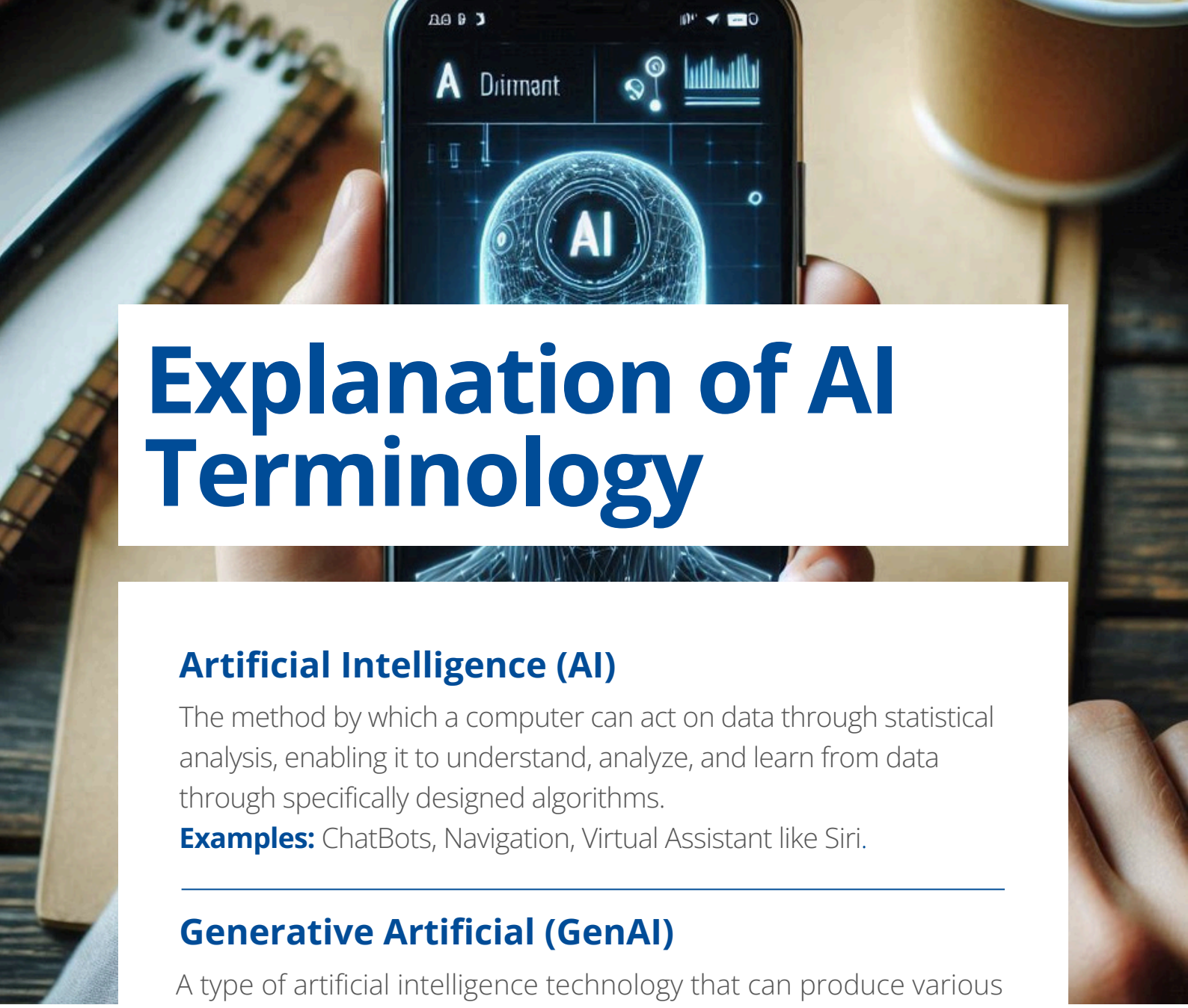
DEEP LEARNING:

Uses a Neural network with multiple layers to process data and make decisions.

GENERATIVE AI:

Ingests prompts to generate text, sounds, images, videos, and code, often indistinguishable from a human.

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Explanation of AI Terminology

Artificial Intelligence (AI)

The method by which a computer can act on data through statistical analysis, enabling it to understand, analyze, and learn from data through specifically designed algorithms.

Examples: ChatBots, Navigation, Virtual Assistant like Siri.

Generative Artificial (GenAI)

A type of artificial intelligence technology that can produce various types of content, such as text, images, audio.

Examples: Microsoft Copilot, Google Gemini, ChatGPT, Claude

Large Learning Models (LLM)

A type of artificial intelligence algorithm that uses large data sets to understand, summarize, and generate content. Think of it as a computer program that is pre-trained with lots of examples and data. ChatGPT is a LLM-based chat bot designed to create human like responses.

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How AI Helps Nonprofits Create Efficiencies

- **Fundraising:** AI can use donor data to personalize campaigns and predict donor actions. This can help with increasing donations.
- **Volunteer Management:** AI-powered platforms can match volunteers with opportunities based on their profiles. This makes volunteering easier and more productive.
- **Impact Measurement:** AI can use data to track and evaluate the results of nonprofit programs. This helps nonprofits make data-driven improvements.
- **Donor Engagement:** AI-powered chatbots and virtual assistants can interact with donors, answer questions, update on projects, and thank them. This enhances donor relationships.
- **Operational Efficiency:** AI can automate tasks such as scheduling, data entry, and reporting. This saves staff time and lowers costs.
- **Program Customization:** AI can use data and feedback to tailor programs and services. This ensures that nonprofits offer relevant and effective interventions.
- **Risk Assessment and Management:** AI can use factors to assess risks such as funding, regulation, or security. This helps nonprofits deal with risks proactively and ensure resilience.
- **Strategic Planning:** AI can use trends, competition, and feedback to inform planning processes. This helps nonprofits find opportunities for growth and innovation while staying true to their mission.
- **Collaboration and Knowledge Sharing:** AI-powered collaboration platforms can facilitate communication and knowledge sharing among staff, volunteers, and stakeholders. This fosters collaboration, creativity, and innovation within the organization.

Developing an AI Strategy for your Nonprofit

1. Take an AI Readiness Assessment to understand your AI maturity and capabilities.

2. Follow an AI Readiness Checklist. Example:

STEPS	DESCRIPTION
Identify Needs	Understand the needs of your organization and how AI can help meet those needs. What problems are you trying to solve?
Data Readiness	Assess the quality and quantity of your data.
Skills and Expertise	Evaluate the AI skills and expertise within your organization.
Ethical Considerations	Consider the ethical implications of using AI.
Technology Infrastructure	Assess your technology infrastructure's readiness for AI.
Data Readiness	Determine the budget for AI initiatives.
Training and Education	Plan for training and education for your staff.
Partnerships	Consider partnerships with AI vendors or consultants.
Pilot Project	Start with a pilot project to test the benefits of AI for your organization.
Evaluation	Regularly evaluate the effectiveness of your AI initiatives.

Developing an AI Strategy for your Nonprofit

3. Determine use cases within your organizations that will help create efficiencies and automate processes.

4. Determine which AI tool(s) are best fit for your organization.

5. Create an AI policy
    a. How to protect confidential data
    b. What AI tool(s) are allowed to be used by staff/employees
    c. Review AI Policy with staff

6. Implement AI awareness training for staff/employees.
    a. Identify the best practices for using prompts to communicate with AI tools
    b. **Security and Governance:** Determine what data should NOT be included when leveraging AI as a resource

7. Determine how to stay up to date with this fast-moving technology.

AI is an ongoing process of learning and adapting. To prepare, adopt, and implement AI technologies well, your organization needs an AI strategy. An AI strategy will help your organization to achieve benefits and improvements for staff.

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Ethical Challenges

Ethical AI is about ensuring that AI technologies are developed and used in ways that align with societal values and moral principles. The objective is to diminish negative impacts, uphold equity, and honor human rights as we harness the capabilities of AI. An important takeaway from this section is always reviewing and verifying that the output is accurate and correct.



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Ethical Challenges

Fairness and Bias:

AI systems should be created to be fair and impartial to all users, ensuring they do not possess biases related to race, gender, age, or any other traits that might get unintentionally integrated into AI via skewed data.

Example: An AI hiring tool must be checked for biases to ensure it doesn't favor certain demographic groups over others. If an AI is trained on historical hiring data that reflects biases, it could perpetuate those biases.

Transparency:

AI systems should be transparent about how they operate and make decisions. Users should understand how and why an AI system reached a specific outcome. How AI systems make decisions is crucial for trust and accountability. You always want to verify the output for accuracy and honesty before sharing.

Example: A credit scoring AI should provide clear explanations for why it approved or denied a loan application, allowing applicants to understand the reasoning and appeal if necessary.

Privacy and Data Protection:

AI systems often rely on large amounts of data, which raises concerns about privacy. Ethical AI should ensure that personal data is collected, stored, and used in ways that protect individuals' privacy rights. AI systems learn from the data that is requested which means when you ask a question, the AI system will integrate all information into its machine learning. So, never input confidential data, personal identification, etc.

Example: An AI-powered health monitoring app should use encryption and secure data storage to protect sensitive health information from unauthorized access.

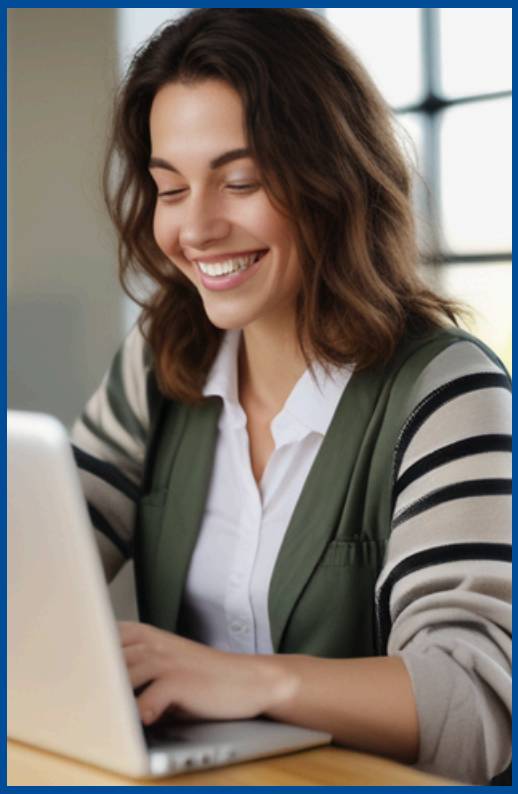
Hallucinations:

Hallucinations occur when an AI model delivers false, incorrect information. The AI model can overinterpret the prompt and start “seeing things” that aren’t there, so it will give back incorrect output.

Example: An AI tool generates a report on nonprofit advocacy efforts that shows the organization successfully negotiated with all world governments to end human trafficking by 2025. The response is an overstated and impossible achievement which could lead to unrealistic expectations among stakeholders, potentially resulting in disappointment and loss of credibility.

Popular Generative AI (GenAI) tools

Microsoft Copilot



Microsoft created Copilot as an AI-powered assistant to help users navigate various tasks more efficiently. It integrates the context and intelligence of the web, personal work data, and real-time PC activity to assist while prioritizing user privacy and security. Initially introduced as Bing Chat, Copilot evolved to unify capabilities across Microsoft's products, enhancing productivity in Microsoft 365, and redefining search with Bing and Edge. It's designed to understand natural language, allowing users to interact with technology more intuitively. Copilot is part of Microsoft's vision to create a seamless experience across devices and applications, making AI accessible to everyone.

Copilot Commercial Data Protection (Free Version)

- Formerly Bing Chat Enterprise is now called Copilot. There is no additional cost for most Microsoft 365 licenses
- Uses large language models: GPT 4 and DALL-E 3
- Business and user data is protected and will not be shared outside your organization

Microsoft 365 Copilot ($25.50/user/month)

- Copilot integrated into all your Microsoft applications like Word, Excel, PowerPoint, Outlook, and Teams
- Consider this as a “private” cloud which has access to your internal data.
- Licenses must be purchased on an annual basis. There is no minimum number of licenses required for purchase

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Popular Generative AI (GenAI) tools

Microsoft Copilot

Use Cases

- Summarize an email in Outlook
- Create a PowerPoint presentation
- Summarize a Teams meeting
- Rewrite a paragraph, sentence, or document
- Create a marketing strategy

Potential Time Savings

Writing a first draft:

Without Copilot: 14 minutes



With Copilot: 8 minutes

Summarize a missed meeting:

Without Copilot: 43 minutes



With Copilot: 11 minutes

Researching information:

Without Copilot: 24 minutes



With Copilot: 18 minutes

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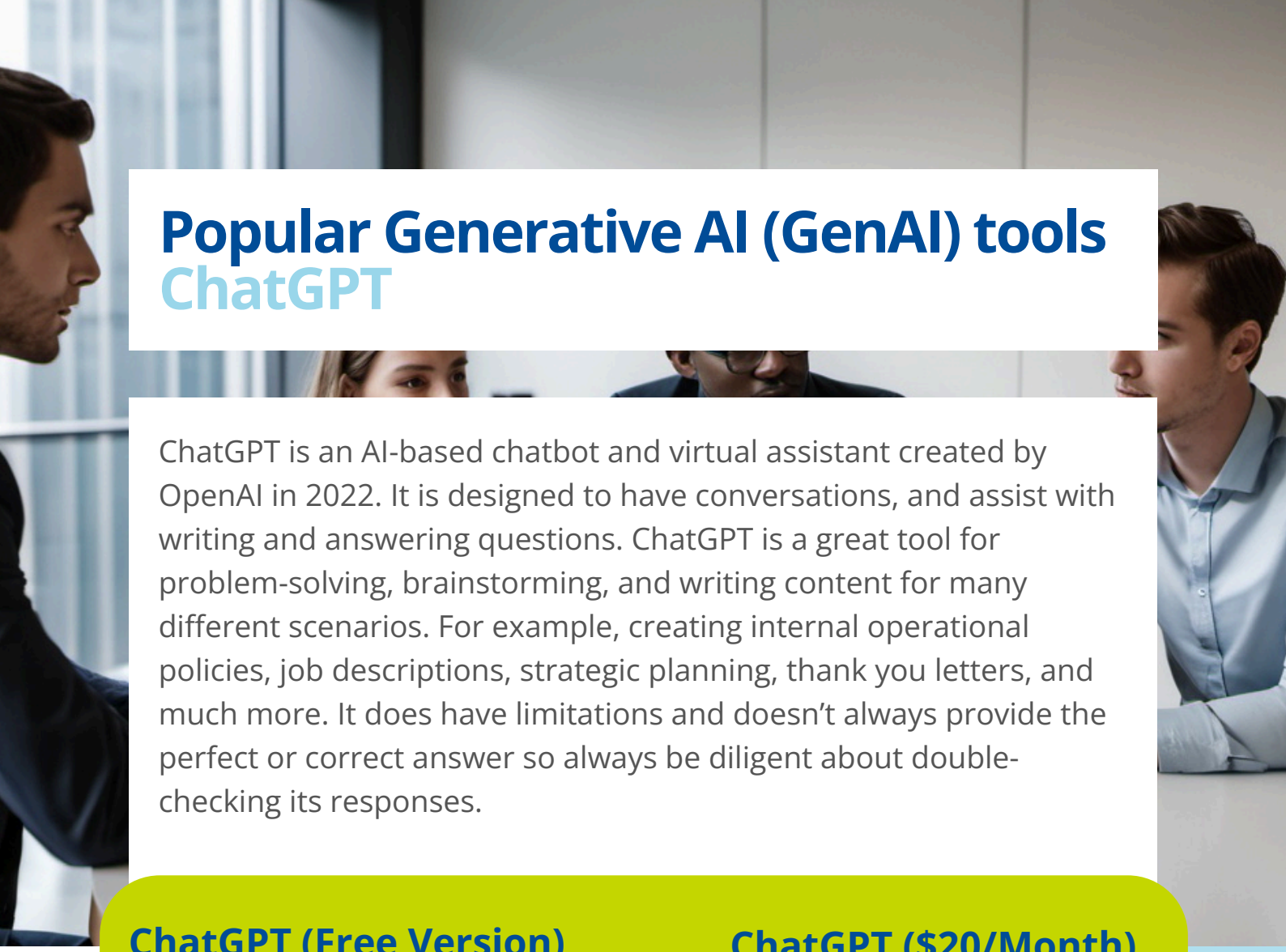
Popular Generative AI (GenAI) tools
Google Gemini

Google Gemini is considered Generative AI (GenAI). Generative AI refers to AI models that can create new content, such as text, images, music, and more, based on the data they were trained on. Google Gemini, formerly known as Bard, is designed to enhance creativity and productivity by understanding and processing various types of information, making it a versatile tool for generating content.

The paid version of Gemini offers the advantage of a more “private” AI tool that can also use data stored within Google Workspace. The Free version only uses the web to search their models. On the other hand, the free version is ideal for creating graphical images and basic functions. See key differences in the table below.

Gemini Basic (Free version)	Gemini Advanced ($19.99/month)
Basic text & image generation, translation, and simple summarizations	Gemini integrated into Google Workspace including Doc’s, Sheets, etc.
Restricted usage quotas per day	Higher or Unlimited usage quotas
May include Ads or promotions and only access to community forums for support	Ad free experience and Priority support

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Popular Generative AI (GenAI) tools
ChatGPT

ChatGPT is an AI-based chatbot and virtual assistant created by OpenAI in 2022. It is designed to have conversations, and assist with writing and answering questions. ChatGPT is a great tool for problem-solving, brainstorming, and writing content for many different scenarios. For example, creating internal operational policies, job descriptions, strategic planning, thank you letters, and much more. It does have limitations and doesn't always provide the perfect or correct answer so always be diligent about double-checking its responses.

ChatGPT (Free Version)	ChatGPT ($20/Month)
Assistance with writing and problem-solving.	Assistance with writing and problem-solving.
Access to GPT 3.5	Access to GPT 4, 4o, 3.5
Limited access to data analysis, file uploads, web browsing, and custom GPTs	Image creation and fast response times
Content is used to train their models	Opt-out option for content used to train their models

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What is Prompting in AI?

Prompts are a key component of using AI tools successfully. They provide the AI system with guidance and background information that it then processes through its internal mechanisms and produces the output. Depending on the desired outcomes, prompts can range from basic commands to elaborate questions.



Prompting: Best Practices in Simple Terms

Need	Prompt
Enhance Donor Engagement	Generate a personalized email for a donor who contributed $100 to our recent campaign, thanking them and explaining the specific impact of their donation on the project
Grant Writing Help	Compose a detailed introduction for a grant proposal targeting childhood education programs, emphasizing our nonprofit's track record and alignment with the grant's objectives
Grant Research	Create a list of corporations in Raleigh, NC that have assets over $1 million
Volunteer Management	Outline a recruitment and scheduling plan for volunteers for our annual food drive, including roles, shifts, and skills required for each task
Marketing Strategy	Create a marketing strategy for nonprofit with limited budget
Operations	Create an AI Strategy for nonprofit
HR	Create a job description for director of fundraising for a nonprofit

Security and Governance

Implement an AI Policy: An AI policy is important for all organizations to implement as it establishes guidelines, rules, and principles for responsible use of this powerful technology. Creating an AI policy for a nonprofit staff involves several key steps to ensure that the use of AI aligns with the organization's mission, values, and ethical standards. Below is a general framework that can help you create a policy that fits your organization's AI needs:

What to Include in an AI Policy:

MISSION ALIGNMENT Ensure that the AI policy is in line with the overall mission and goals of the nonprofit organization.

ETHICAL GUIDELINES Establish clear ethical guidelines use of AI within the organization.

DATA GOVERNANCE Define policies for data collection, storage, access, and usage.

TRANSPARENCY Promote transparency in the use of AI by clearly communicating how AI systems are used within the organization.

FAIRNESS AND BIAS MITIGATION Implement strategies to mitigate biases in AI systems.

ACCOUNTABILITY Establish mechanisms for accountability and oversight of AI systems.

HUMAN OVERSIGHT AND DECISION-MAKING Ensure that AI systems are used to augment human decision-making rather than replace it entirely.

ACCESSIBILITY AND INCLUSIVITY Provide awareness of accessibility and inclusivity in usage.

TRAINING AND EDUCATION Provide training and education for staff members on AI ethics, best practices, and their roles and responsibilities in AI governance.

CONTINUOUS IMPROVEMENT Establish processes for ongoing evaluation and improvement of AI policies and practices.

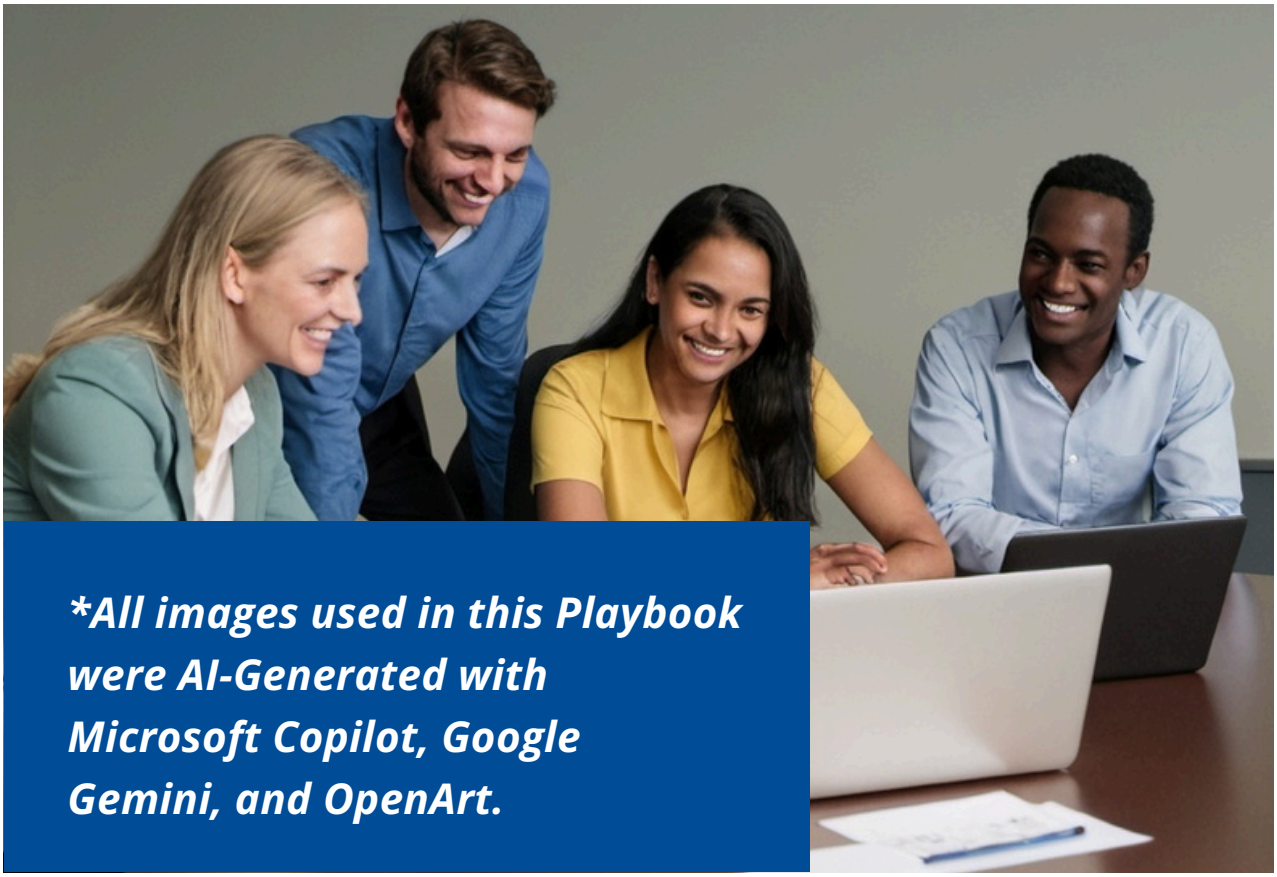
EXTERNAL ENGAGEMENT Consider engaging with external stakeholders to inform the development of AI policies and promote responsible AI practices more broadly.

REVIEW AND REVISION Regularly review and update the AI policy to reflect evolving ethical standards, regulatory requirements, and organizational priorities.



ARTIFICIAL INTELLIGENCE (AI) ACCEPTABLE USE POLICY TEMPLATE

Conclusion



All images used in this Playbook were AI-Generated with Microsoft Copilot, Google Gemini, and OpenArt.

To sum up, the AI strategy playbook demonstrates how artificial intelligence can transform our day to day lives. It offers a comprehensive framework for organizations to tap into the benefits of AI, enhancing innovation and productivity. By incorporating ethical principles and promoting a culture of constant learning, organizations can handle the benefits and challenges of AI. The playbook highlights the need for cooperation, flexibility, and strategic vision in using AI to improve efficiencies and simplify processes. Let's look forward to the journey ahead with optimism and excitement, ready to explore the opportunities that AI can provide.

AI and Training Resources

- Build Your Generative AI Productivity Skills with Microsoft and LinkedIn: Transform raw data into meaningful insights, create compelling presentations, and generate creative images using the latest tools.
- AI for Nonprofits—Program Management: This collection is aligned with program management and administrative task roles. Learn how AI tools such as Copilot can help manage everyday tasks to increase efficiency, automate time-consuming tasks, and give time back to your team.
- AI for Nonprofits- Funding: Explore the resources in this collection to learn how to use Copilot to elevate your productivity in fundraising, grant management, donor relations, social media, and marketing.
- Read: Smart AI Prompt Ideas for Nonprofit Success
- ChatGPT for Nonprofits
- How ChatGPT Can Help Support your Mission: TechSoup
- 5 Ways to Use Google Gemini
- 3 Insights from Nonprofits about GenAI
- Best Generative AI Tools Comparison: Features and Pricing
- AI Prompt Templates for Nonprofits
- Create Effective Prompts for Generative AI Training Tools

Microsoft Copilot:

- Explore Copilot for Microsoft 365
- Prompting Ingredients in Microsoft 365 Copilot
- Prompting Do's and Don'ts in Microsoft 365 Copilot

Appendix

Examples of Prompting: Do's and Don'ts

Contextual Information: Start with a filler prompt or background information.

DO "Before we start, here's some context: We are preparing for a major fundraising event for repeat donors. Help me outline a plan for organizing and executing this event."

DON'T
"Start planning the event"

Input Example:

Before we start, here is some context: We are preparing for a major fundraising event for repeat donors. Help me outline a plan to organize and execute this event.

Output Example:

Here's a structured outline to help you organize and execute your major fundraising event for repeat donors:

Pre-Event Planning

1. Define Objectives

- *Fundraising Goal: Set a clear financial target.*
- *Donor Engagement: Enhance relationships with repeat donors.*
- *Awareness: Raise awareness about your cause.*

2. Budget and Resources

- *Budget: Outline venue, catering, entertainment, marketing, etc. costs*
- *Sponsorships: Seck sponsors to offset costs.*
- *Volunteers and Staff: Identify team members and assign roles.*

3. Date and Venue

- *Date: Choose a date that accommodates most donors.*
- *Venue: Select a venue that aligns with the event's theme and capacity needs.*

4. Theme and Program

Thome: Decide on a theme that resonates with donors and your cause.

• Program: Plan activities (e.g., speeches, auctions, entertainment).

5. Invitations and Marketing

Appendix

Examples of Prompting: Do's and Don'ts

Set Specific Goals and Parameters:

Clearly state the task's purpose.

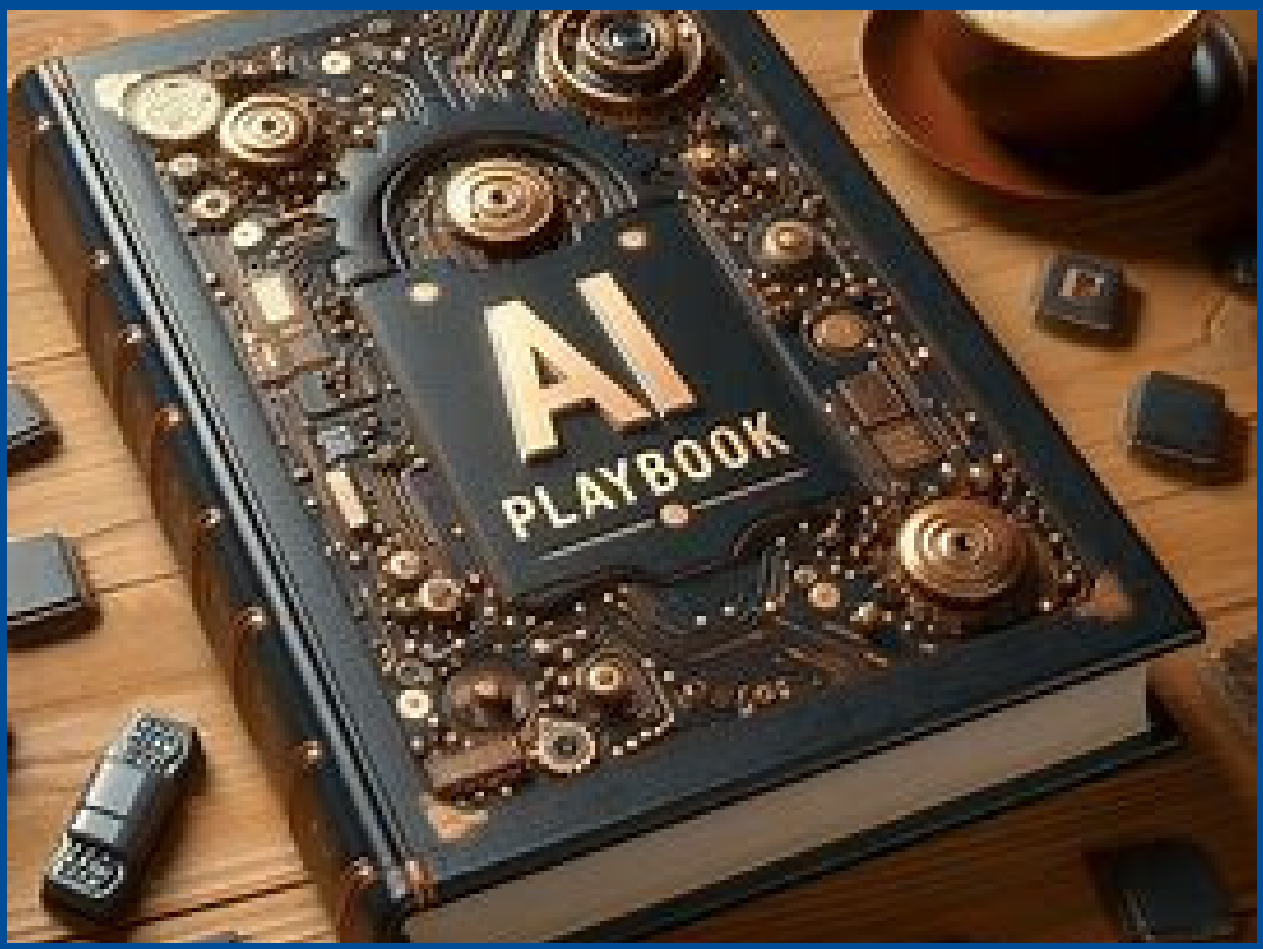
DO Write a blog post to inform readers about the benefits of our new program. Organize the post to include a standard introduction, discussion of the benefits, and a summary paragraph."

DON'T
"Write about our new program."

Guidance on Tone and Style:

DO Write an article about Apparo in a friendly and engaging tone suitable for a youth audience."

DON'T
"Write an article about Apparo."



Appendix

Examples of Prompting: Do's and Don'ts

Clarity Check:

Ensure another person can understand your prompt.

DO "Explain the process of Apparo's volunteer recruitment concisely and in simple terms."

DON'T "Explain volunteer recruitment."

Input Example using ChatGPT:

Explain the process of Apparo volunteer recruitment concisely and in simple terms

Output Example:

Apparo recruits volunteers by first identifying the skills needed for their projects. They then reach out to potential volunteers through their network, social media, and partner organizations. Interested individuals can sign up online, where they provide details about their skills and availability. Apparo matches volunteers with suitable projects and provides necessary training or orientation. The process is designed to be straightforward, making it easy for people to get involved.

Use the Power of Logic:

DO Explain the steps you took to identify high-value donors from this list <insert list>."

DON'T "Identify high-value donors from this list <insert list>."



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Acknowledgements

We are thrilled to extend our heartfelt thanks to the incredible team of volunteers, including Karl Schelhammer, who generously dedicated their time, expertise, and creativity to help create our AI for Social Good Playbook. Your contributions have been invaluable in making this resource for nonprofits a reality.

From crafting insightful content to providing thoughtful feedback, each of you played a crucial role in bringing this project to life. Your commitment to helping others navigate the world of AI is truly inspiring, and we couldn't have done it without you.

Thank you for your passion, hard work, and unwavering support. Together, we are making a difference and empowering others to harness the power of AI.

With deep gratitude,

Stephanie McKee, Chief Technology Thought Partner
Apparo

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