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Preparing for AI

Key Considerations for Nonprofits

Ryan Harrington
ryanh@techimpact.org

Linda Widdop
linda@techimpact.org

WE'RE A NONPROFIT ON A MISSION TO USE TECHNOLOGY TO BETTER SERVE THE WORLD.

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Agenda

What is AI?
What can it do?
How can you use it?
How do you become AI ready?

What is artificial intelligence?

Machine Learning

Robotics

Expert Systems

Vision

Planning

Speech

Natural Language Processing

Machine Learning

Robotics

Expert Systems

Vision

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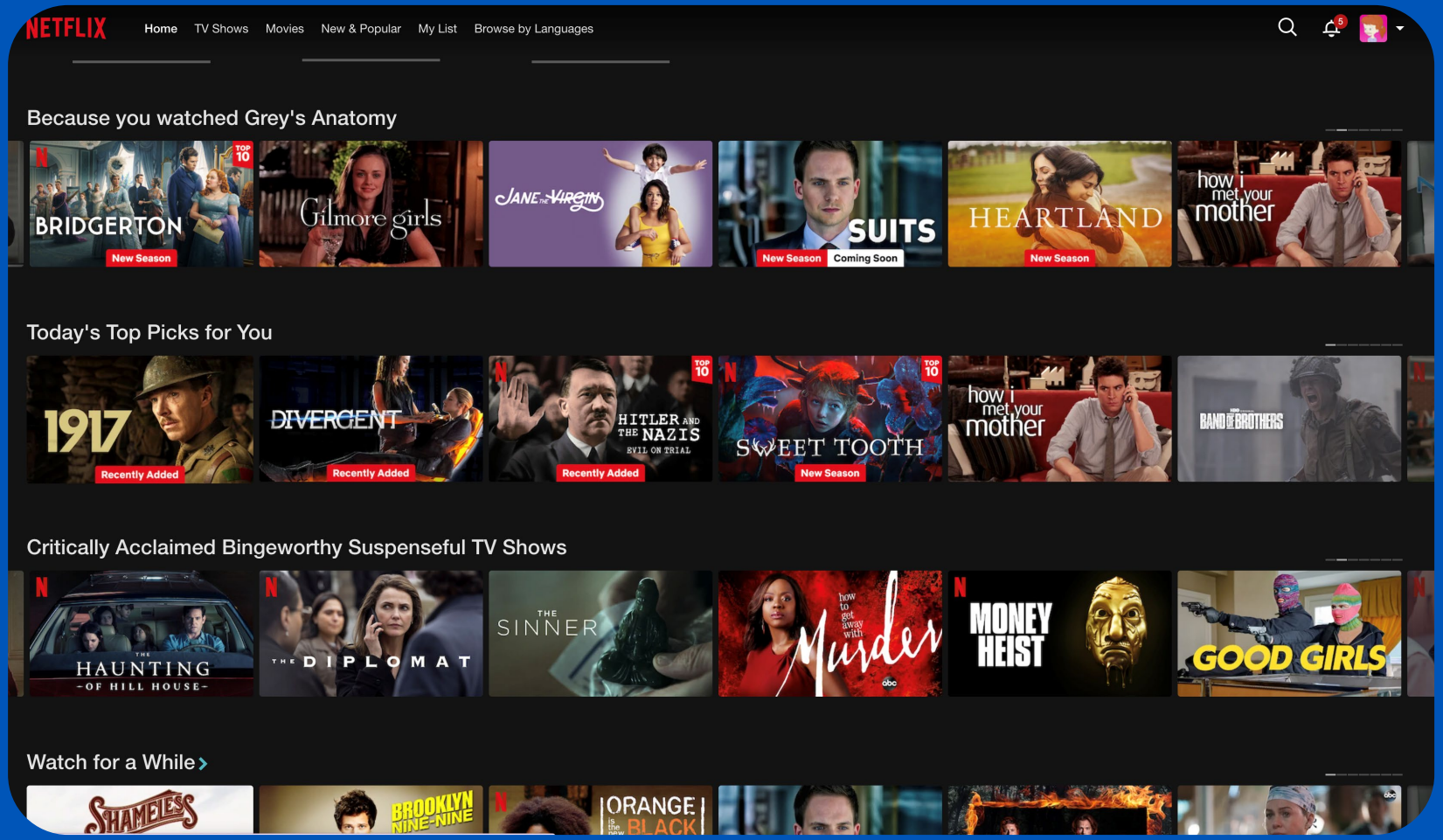
Speech

Natural Language Processing



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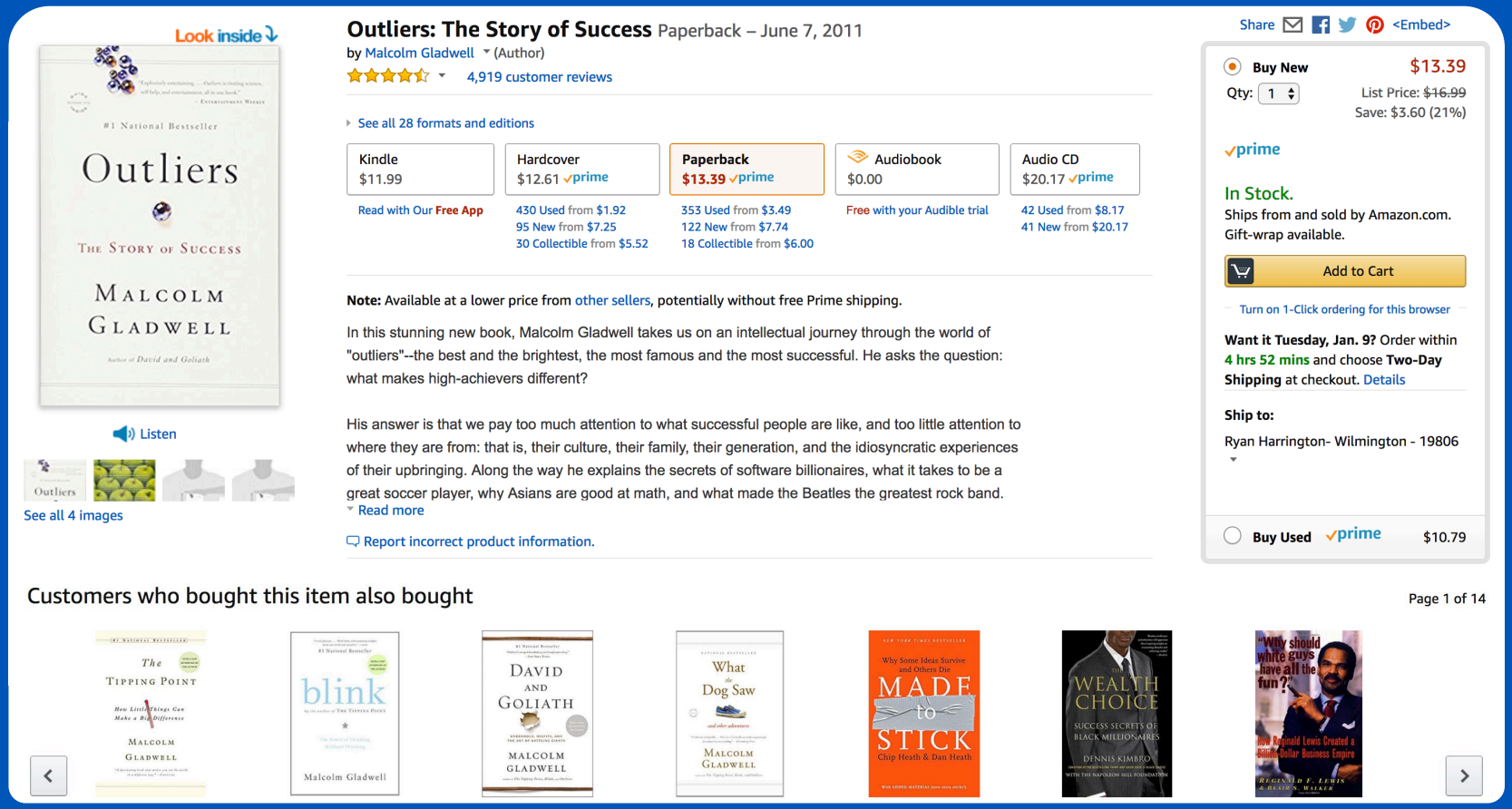

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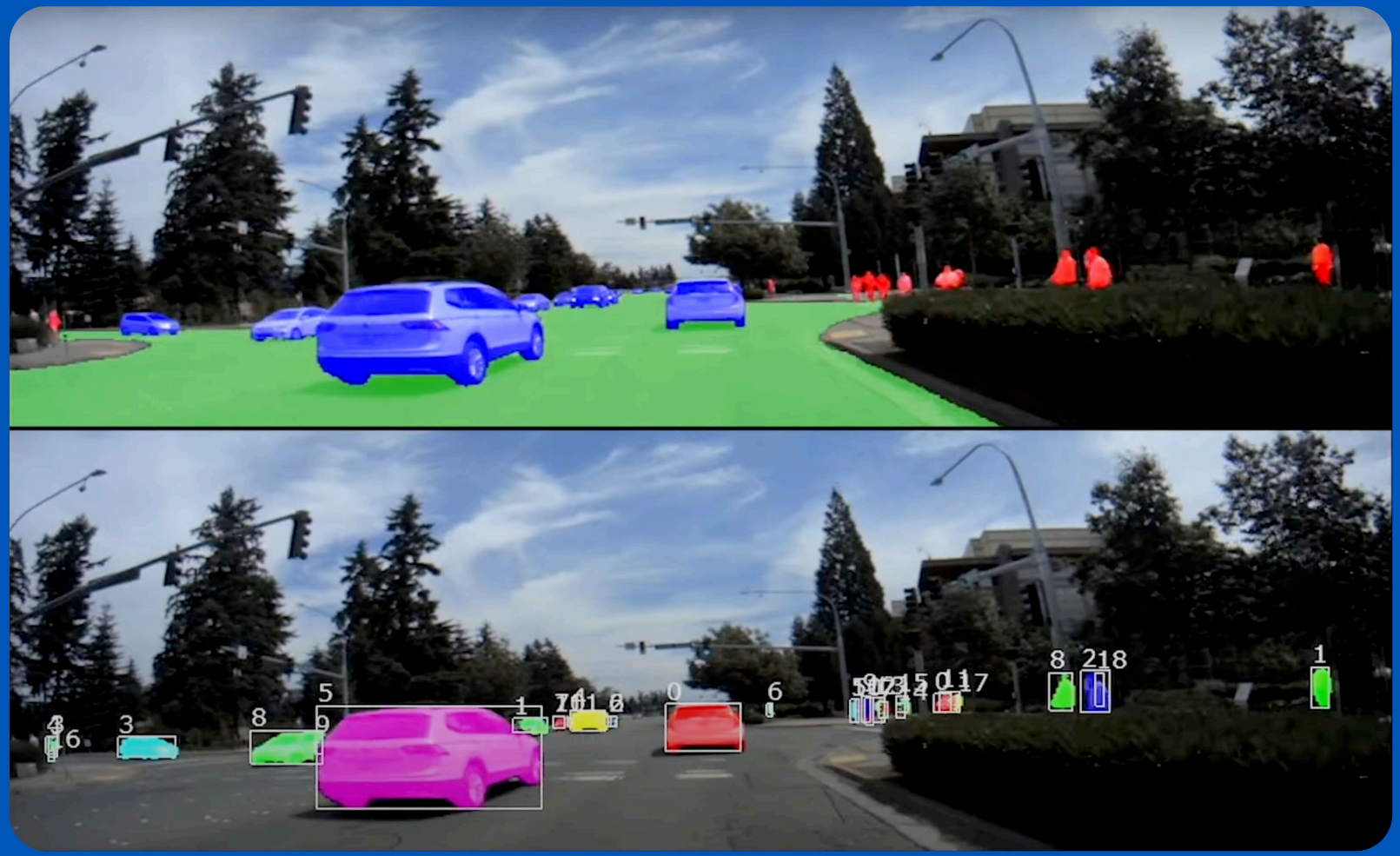

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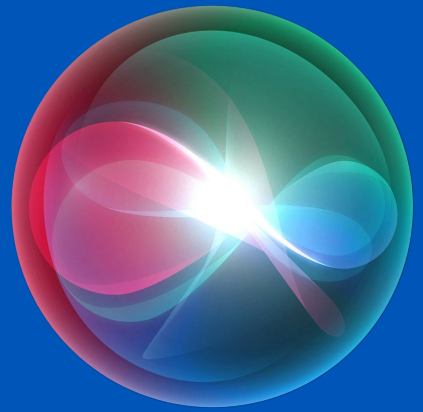

Machine Learning

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Natural Language Processing

What is *generative* AI?

Key components

Internet Scale Data

Content Creation

Variability & Creativity

Various Modalities

Use it to…

write a first draft

refine language

summarize

ideate

extract or classify data

automate communication

localize content

generate code

augment your work

…and many, many more

Problem: We want to begin using generative AI in our practice.

Solution: Free, Off-the-Shelf Tools

Solution: Prompt Engineering

- Include Details
- Adopt a Persona
- Use Delimiters
- Specify Output Length
- Specify Steps
- Provide Examples

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Before:

```
Write a thank you letter to a grantee organization for
attending a conference.
```

Solution: Prompt Engineering

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- Adopt a Persona
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- Provide Examples

Before:

```
Write a thank you letter to a grantee organization for
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```

After:

```
You are a grant making officer at a large Foundation.
You want to build stronger relationships with grantees.
Recently grantees attended a conference focused on
measurement and evaluation. Write a thank you letter to
your grantees including your excitement for them to
begin using the techniques discussed at the conference.
```

Solution: Prompt Engineering

- Include Details
- Adopt a Persona
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- Specify Output Length
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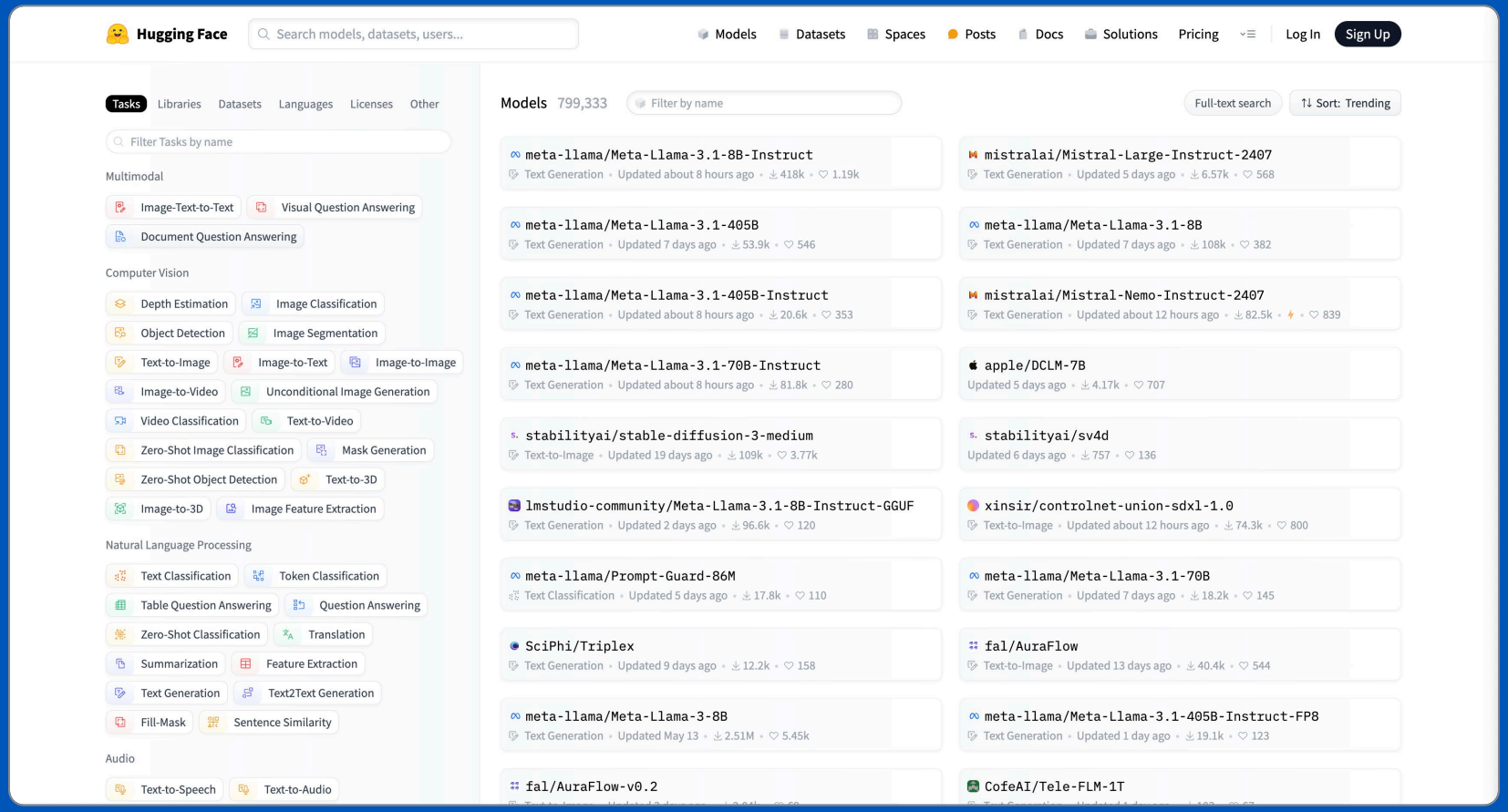
```

Problem: We need to keep our data secure while using generative AI.

Solution: Paid Tools

Solution: Self-Hosting



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Do not edit
How to change the design

What are some challenges your team have run into while using generative AI tools?

ⓘ The Slido app must be installed on every computer you're presenting from

slido

Large *Language* Model

≠

Large *Knowledge* Model

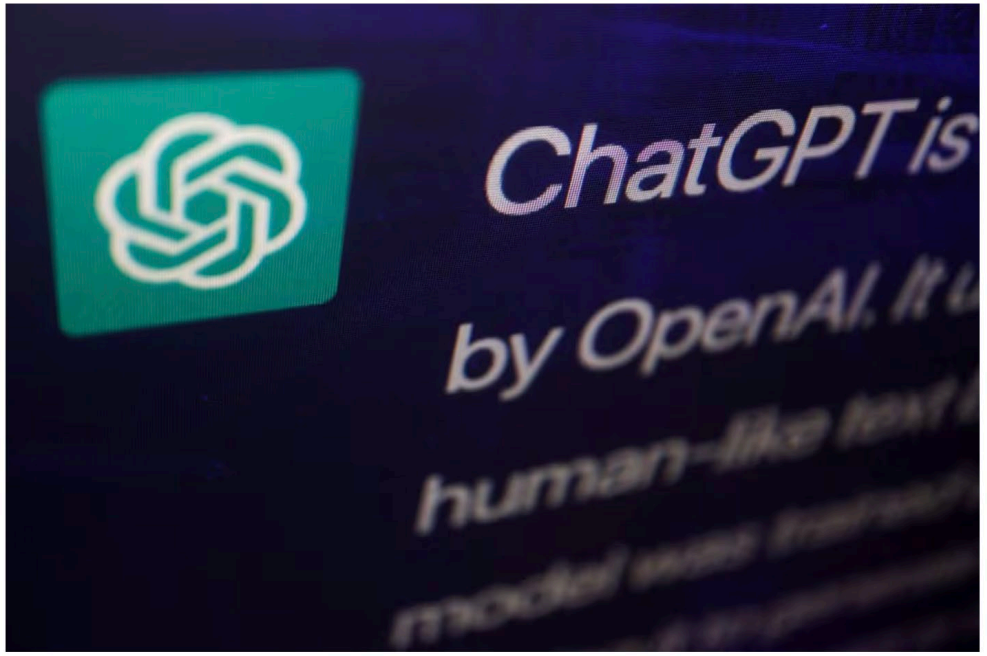
Hallucinations

Creating incorrect responses (that sound correct) with high confidence.

New York lawyers sanctioned for using fake ChatGPT cases in legal brief

By **Sara Merken**

June 26, 2023 4:28 AM EDT · Updated 5 months ago



A response by ChatGPT, an AI chatbot developed by OpenAI, is seen on its website in this illustration picture taken February 9, 2023. REUTERS/Florence Lo/Illustration *Acquire Licensing Rights*

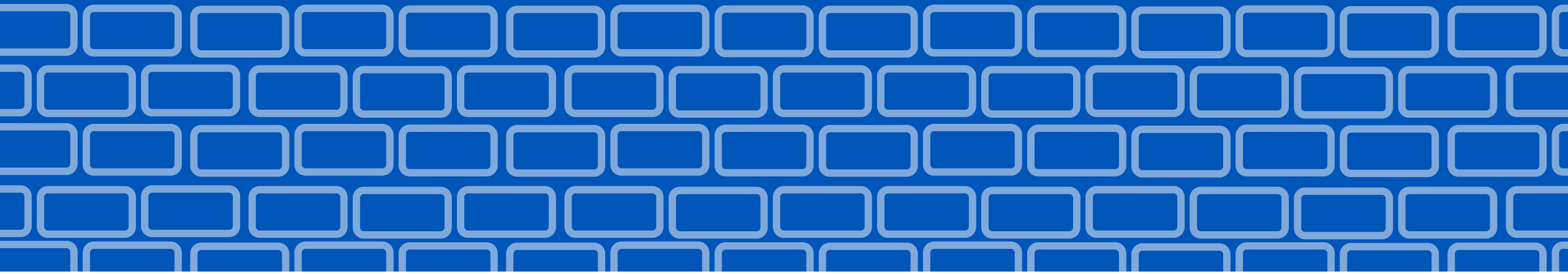
NEW YORK, June 22 (Reuters) - A U.S. judge on Thursday imposed sanctions on two New York lawyers who submitted a legal brief that included six fictitious case citations generated by an artificial intelligence chatbot, ChatGPT.

Source

Problem: We need the outputs of our generative AI tools to reference accurate, up-to-date information.

You are a legal aid organization. You have a repository of case law that you want to summarize and directly reference to augment the work of your legal team.

Foundation Models



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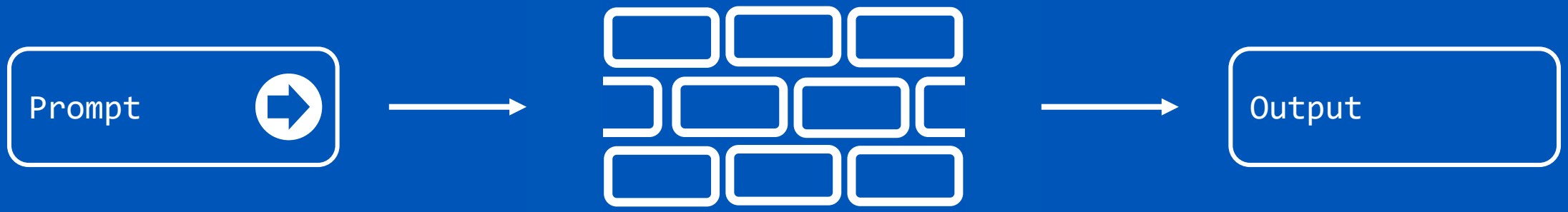
GPT 3.5

GPT 4.0

GPT 3.5

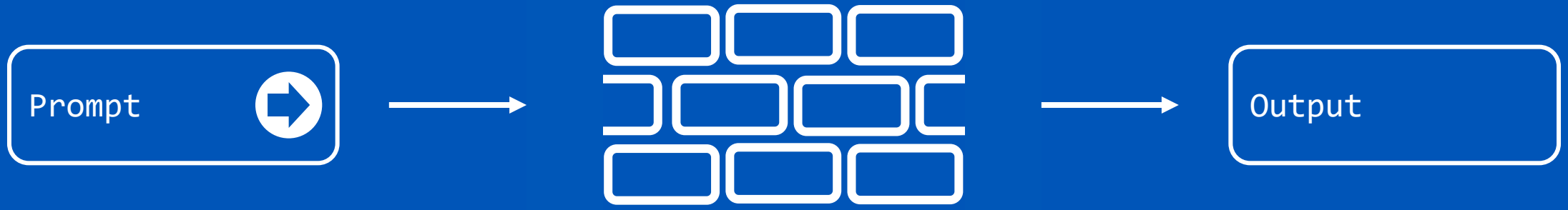
GPT 4.0


Prompt
Output

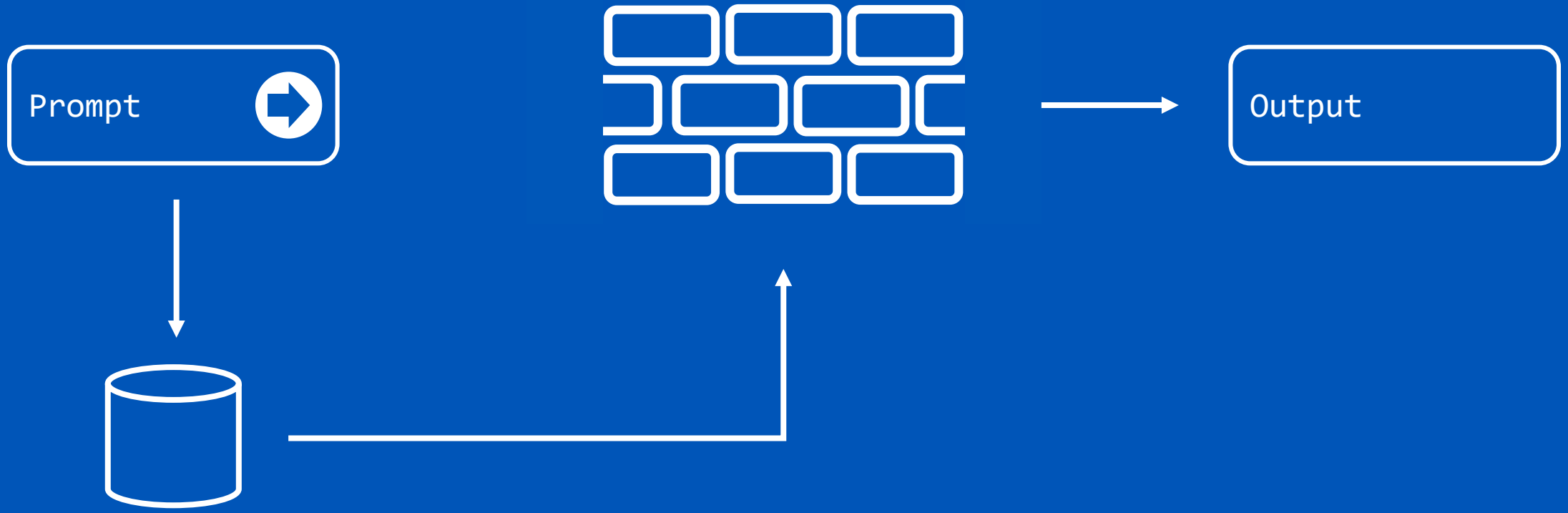
Solution: RAG Models

Retrieval Augmented Generation

Solution: RAG Models



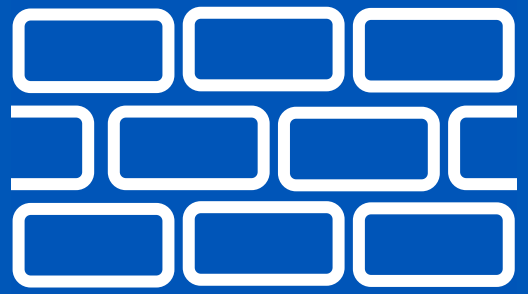
Solution: RAG Models



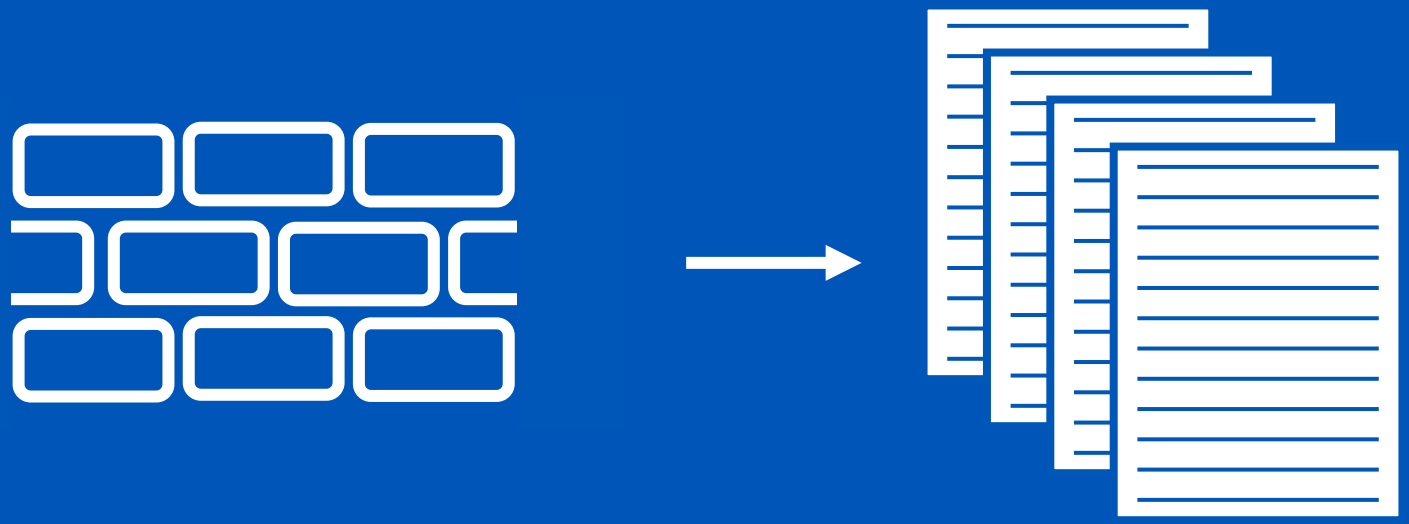
Problem: We have language specific to our domain that generative AI does not understand.

Your organization is focused on helping patients who are aging in place. Your case notes for your patients regularly include medical terminology.

Solution: Finetuning



Solution: Finetuning



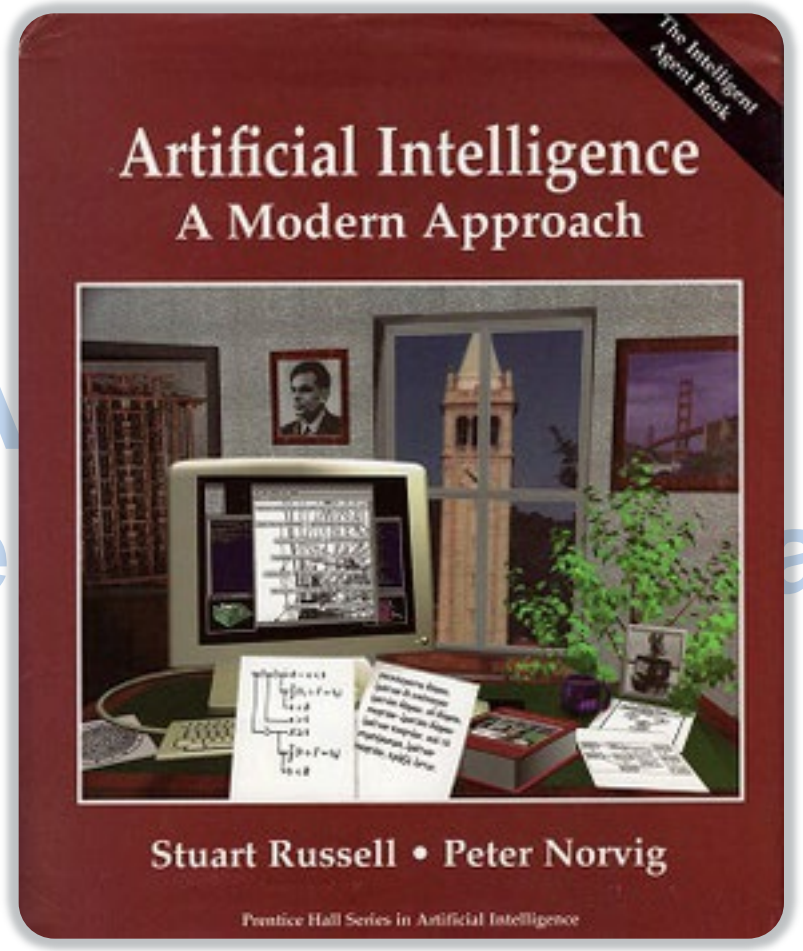
Solution: Finetuning

Problem: We have a specialized task that we want to use generative AI to solve repeatedly.

Your organization needs to intake new patients. When a new patient is booked and their intake survey is completed, you want to make sure their counselor receives a summary of their history.

What are agents?

Anything that perceives its environment and acts on it



1995!

A perceives its
e and acts on it

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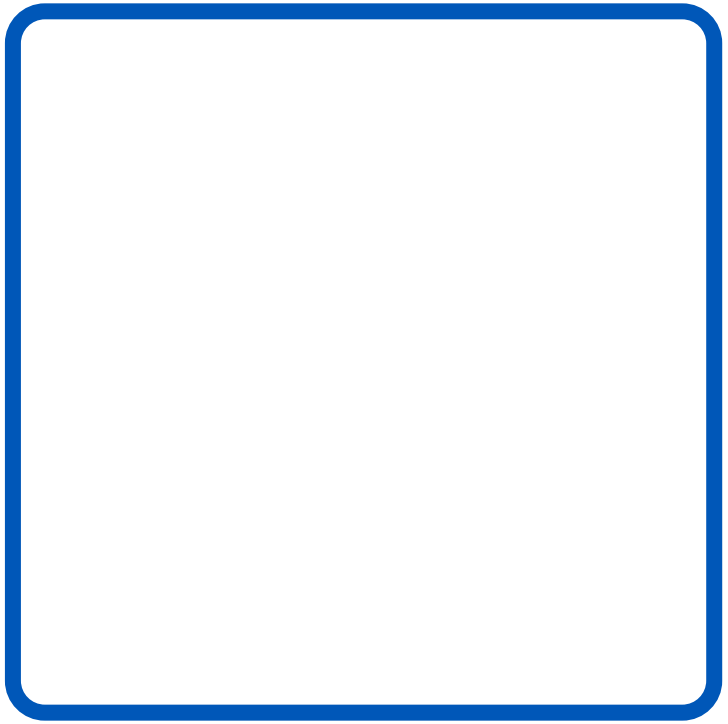
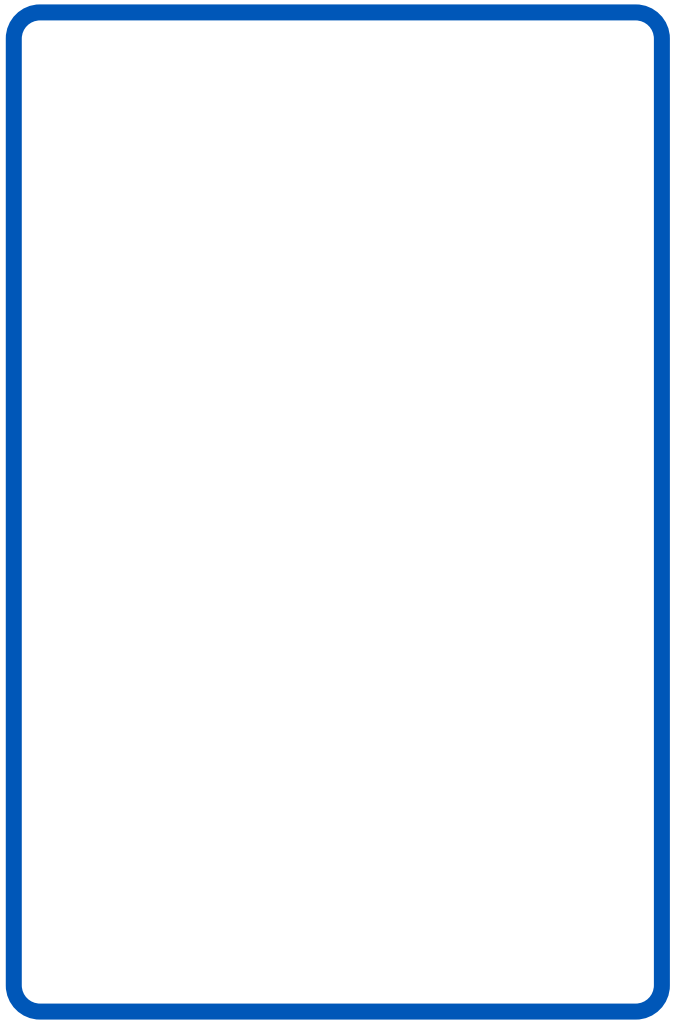


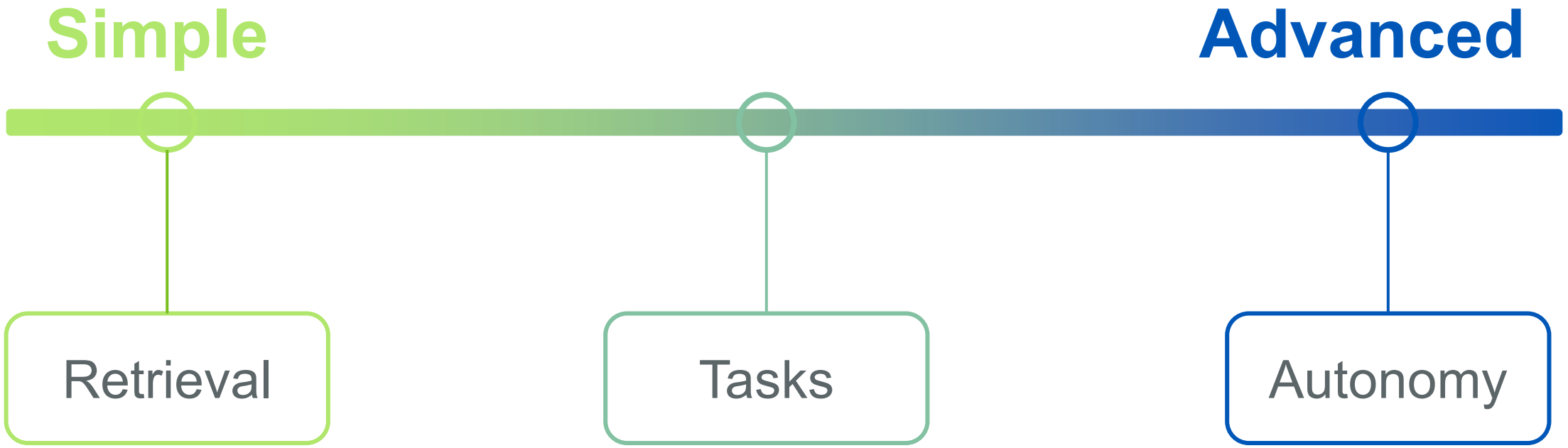


Agents

Automation

Non-deterministic

Deterministic


Simple
Advanced
Retrieval
Tasks
Autonomy

Customer Service	Sales	Finance	Marketing	HR	Legal	IT
Support Entry	Customer Self Service	Quote to cash	Customer insights and strategy	Employee Engagement	Compliance Management	Capacity Management
Assignment	Lead Generation	Record to Report	Demand creation	Recruiting	Contracts & Agreements	Customer Satisfaction Score
Diagnosis	Sales Engagement	Tax & Treasury	Content Creation	HR Admin	Risk Management	IT Budget Variance
Resolution	Sales Presentation	Planning & Analysis	Campaign execution	Compensation & Benefits	Litigations	Security
Continuous Improvement	Negotiations & Closing	Risk Management & Compliance	Recommendation engine	Learning & Development	Consultations	Service Operations
	Post-Sale Follow Up and Upsell	Procure-to-pay	Sales enablement	Talent Management	IP	
	Sales Analysis & Forecasting		Communication	HR Strategy & Planning		

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Source: Microsoft Nonprofit Summit

What are the components of an agent?

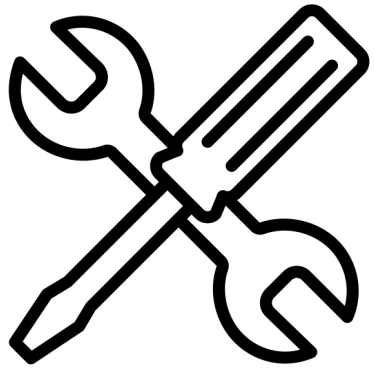
Large Language Model

Environment

Trigger

Data

Tools



Supervisor

How have we done this?

Nonprofit PolicyBuilder

Welcome to the Computer Use Policy Digital Workbook

Developed by Tech Impact, this tool leverages over a decade of industry experience to help you assess and document your organization's technology practices to auto-generate a customized Computer Use Policy.

WE FOCUS ON FOUR KEY AREAS

A strong Computer Use Policy is essential for nonprofit organizations to protect sensitive data, ensure compliance, and promote responsible technology use across their teams. This workbook cover policy elements that include:

Acceptable Use

Covers how employees can responsibly use their organization's tech, data, and resources.

Bring Your Own Device

Governs how employees can use their personal devices, such as smartphones, laptops, or tables for work purposes.

Data Security

Protects sensitive information, including donor records, client data, and organizational assets, from unauthorized use.

Artificial Intelligence

Ensures ethical and transparent use of artificial intelligence that aligns with organizational mission and values.

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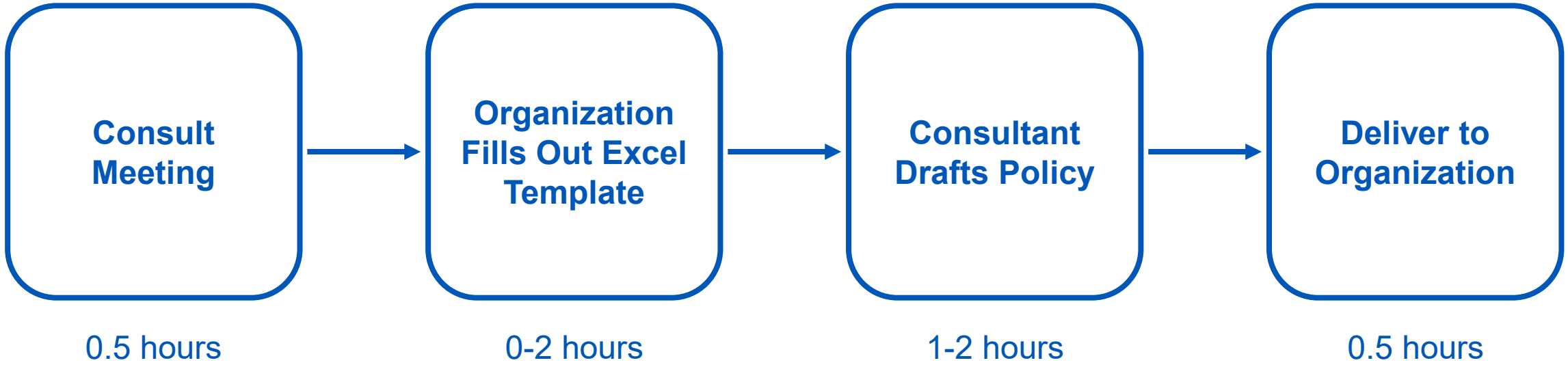
Before Agents



Total Time
2-5 hours

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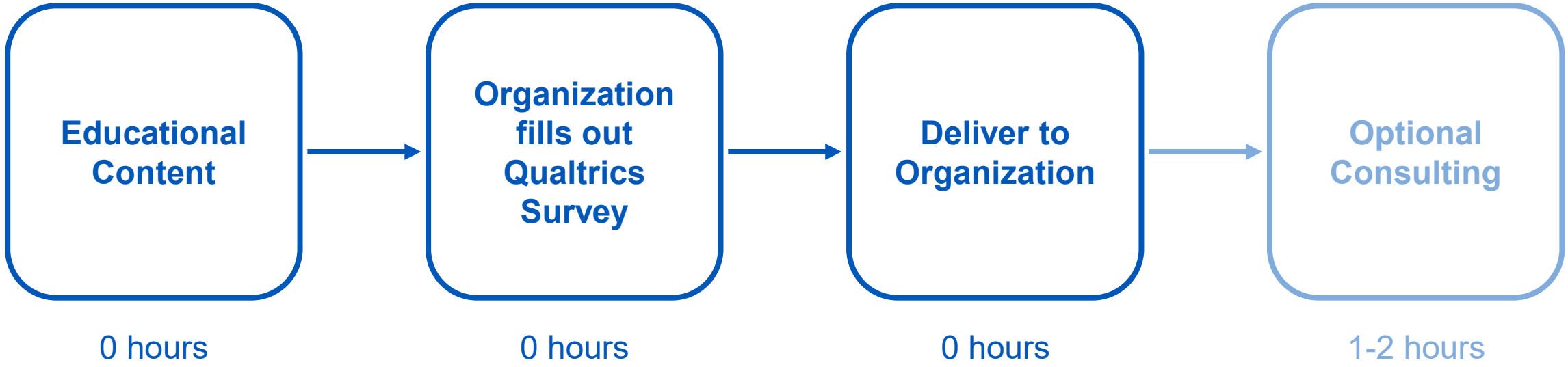
After Agents



Total Time
0 hours

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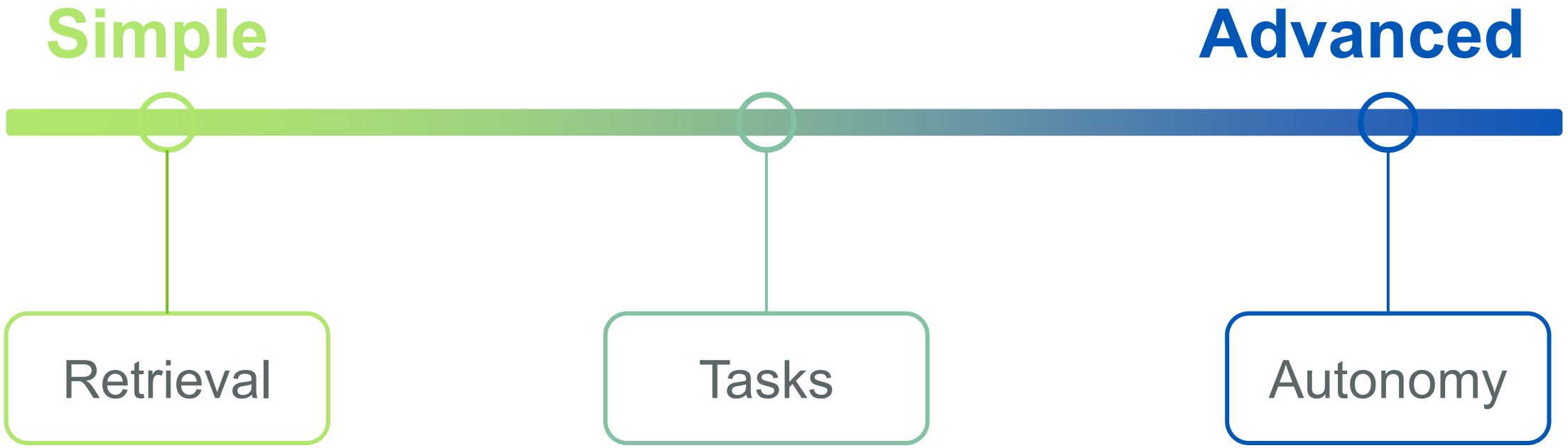
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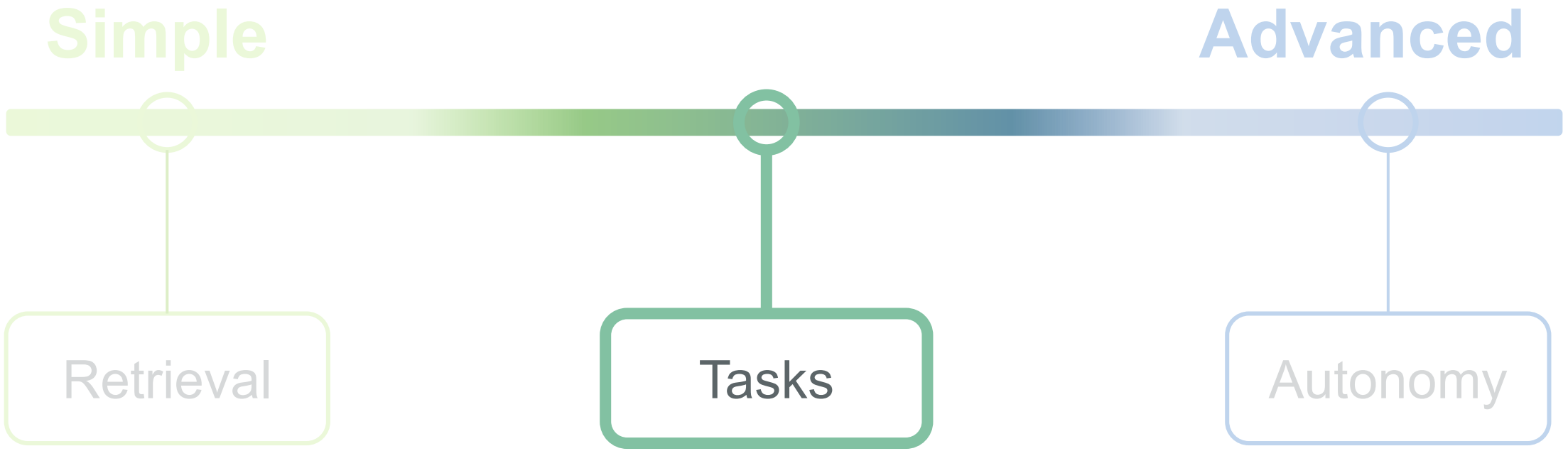
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Use it for free:
techimpact.org/policybuilder
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include:
Acceptable Use
Covers how employees can responsibly use their organization's tech, data, and resources.
Bring Your Own Device
Governs how employees can use their personal devices, such as smartphones, laptops, or tables for work purposes.
Data Security
Protects sensitive information, including donor records, client data, and organizational assets, from unauthorized use.
Artificial Intelligence
Ensures ethical and transparent use of artificial intelligence that aligns with organizational mission and values.

How can you do this in your organization?

1. Identify opportunities
2. Map logic & requirements
3. Prioritize
4. Build & iterate

1. Identify opportunities
2. Map logic & requirements
3. Prioritize
4. Build & iterate

1 Identify opportunities

What are tasks that you or your team performs regularly?

List at least three opportunities on your own.

1 Identify opportunities

For each opportunity:

1. What current level of effort does this require?

2. By saving this level of effort, what additional value would this allow you to create?

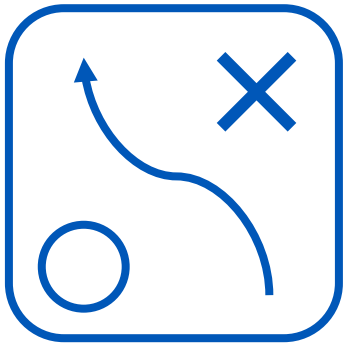
1 Identify opportunities

Share opportunities in groups.

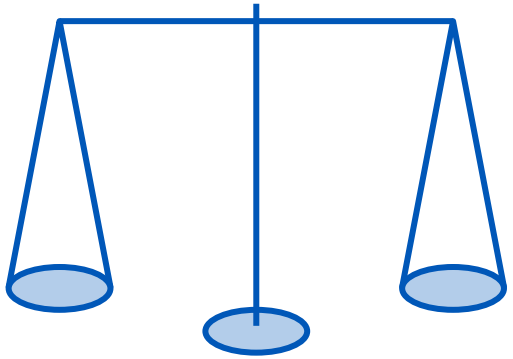
Look for areas of inspiration.

Are there additional opportunities that emerge?

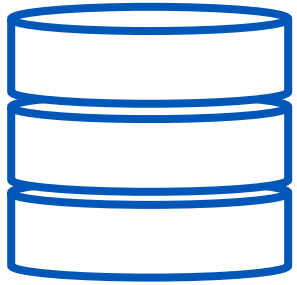
Have you implemented what you need to in order to effectively use AI?



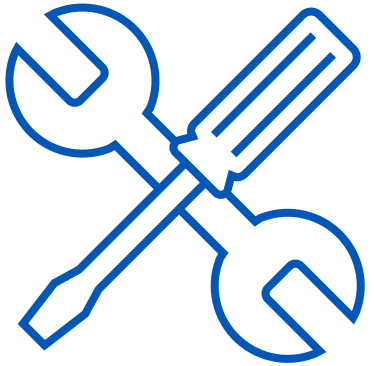
Vision & Strategy



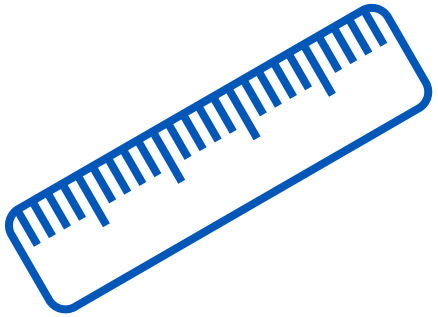
Governance & Ethics



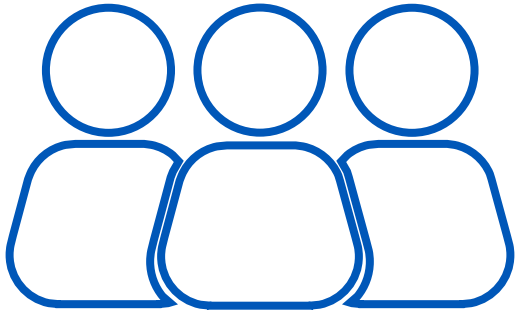
Data & Infrastructure



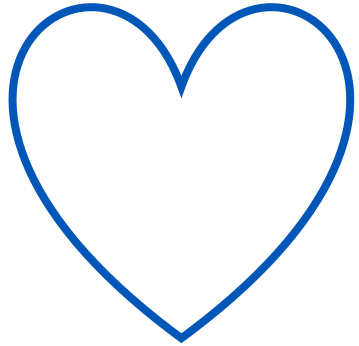
Skills & Capabilities



Measurement & Evaluation



Culture & Transparency



External & Sustainable Support

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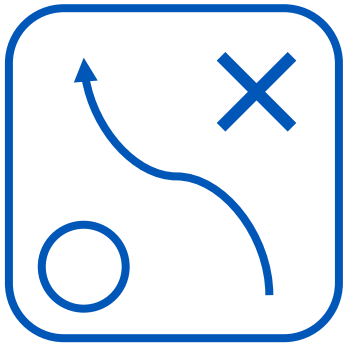


Vision & Strategy

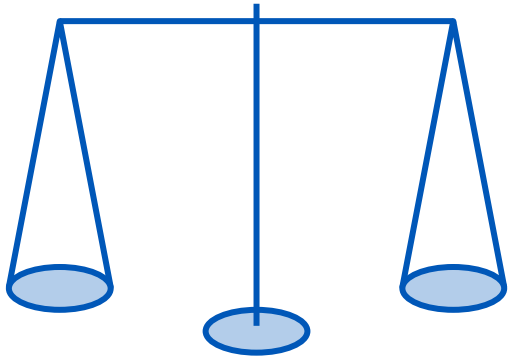
Does your organization have a strategic plan document?

Does the strategic plan guide the organization to consider AI technologies?

Have you leveraged AI in any organizational operations or programming this year, and do you plan to continue doing so in the near future?

Is technology expertise represented among your board or executive leadership team?

Does your organization have the time to invest on innovation tasks/projects (e.g., testing AI use cases)?



Governance & Ethics

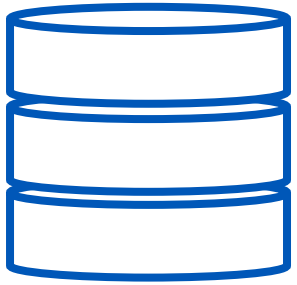
Does your organization have a policy suite/ecosystem that includes data & technology use policies and AI policies?

Do you have systems in place to prevent cybersecurity threats and a robust security plan for your enterprise data?

Who is the lead person or team focused on overseeing enterprise governance matters?

To what extent is staff trained on ethics and governance matters?

How do you communicate risks, breaches, or other data-related concerns to your users?



Data & Infrastructure

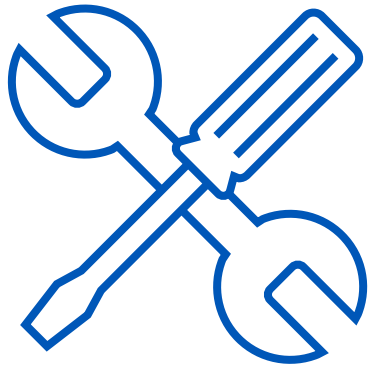
How would you describe the quality of the data you collect across your organization?

Do you have any restrictions on data sharing, and do you leverage data to compare yearly trends?

Is most, if not all, of your data stored digitally, and do you leverage a cloud system for data storage and processing?

Does your current technology infrastructure support AI technologies, and to what extent is that reflected across your systems?

To what extent are recurring reports automated?



Skills & Capabilities

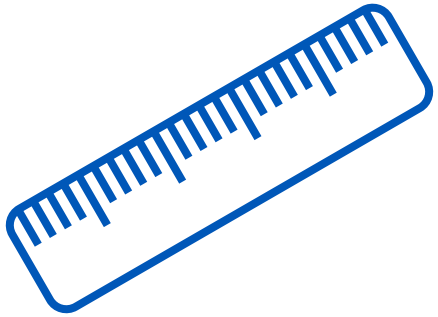
Are people in your organization demonstrating any curiosity towards leveraging AI in the workplace?

How tech-savvy are your associates, and how often are individuals allotted time for developing skills?

Have your staff been introduced to AI in the workplace, and have they worked on any paid AI technologies?

Would you be able to accommodate organization-wide AI training?

How likely are you to be able to integrate AI capabilities into your operational processes?



Measurement & Evaluation

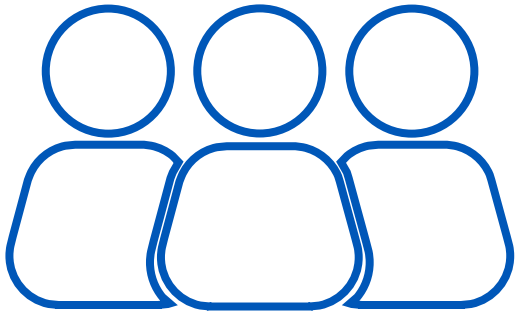
Does your organization have a measurement, learning, and evaluation team(s)?

What is the consensus across your leadership on the ways in which your organization is creating impact?

Does your organization's social impact model follow a measurement plan?

What are your organization's experiences with quasi-experimental and experimental evaluation projects?

Does your organization have the capacity to leverage analytics for decision-making?



Culture & Transparency

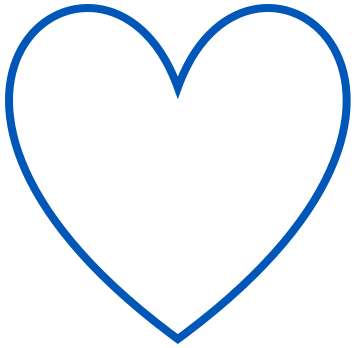
Is there a defined culture for learning within your organization?

To what extent are evaluation processes embedded within your operations and service offerings?

How do you assess and address systematic bias across your data and technology processes?

Are there any possible concerns with AI adaptation among your associates?

How receptive are your associates to your communications, and to what extent do you believe you have the capacity to create a community of support for AI uses within your organization?



External & Sustainable Support

Does your organization receive any external funding sources, and do any of them place restrictions on its ability to leverage data for analytics?

Do you have the funds to test and implement AI innovations?

Would AI potentially help with personnel capacity issues, and have you projected those cost savings yet?

Is your organization involved in research projects, and do any of those partnerships provide an opportunity for innovating with AI at your organization?

How prepared is your organization?

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How prepared is your organization?

Your group will be assigned one (or more!) of the AI readiness domains.

As an individual, reflect upon the key questions related to the domain. Consider how prepared your organization is as it relates to that domain.

Where do you excel?
Where do you need help?

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Find the AI Readiness Domains here:

bit.ly/
ai-readiness-domains

How prepared is your organization?

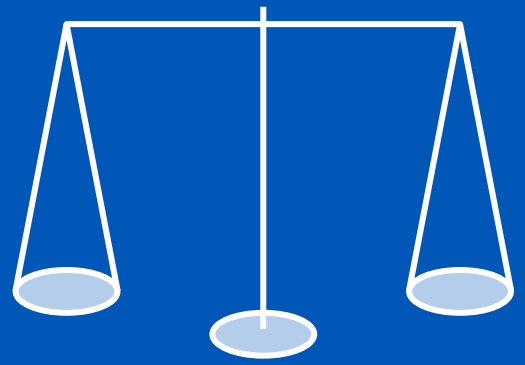
As a group, discuss your individual reflections.

Where is there common ground?

How would you tackle these issues?

Free Tools	Get started!
Prompt Engineering	Improve the output of your prompts
Paid Tools	Keep your organizational data secure
Retrieval Augmented Generation	Reference accurate, up-to-date information
Finetuning	Utilize domain specific language
Agents and Assistants	Solve specialized tasks repeatedly

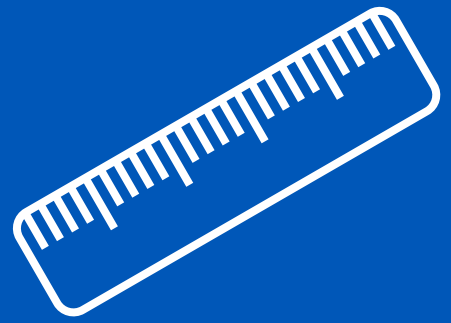
Vision & Strategy



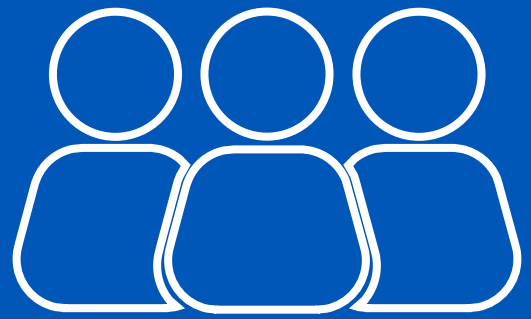
Governance & Ethics

Data & Infrastructure

Skills & Capabilities



Measurement & Evaluation



Culture & Transparency

External & Sustainable Support

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Preparing for AI

Key Considerations for Nonprofits

Ryan Harrington
ryanh@techimpact.org

Linda Widdop
linda@techimpact.org