

AI Adoption for Nonprofits

Presented by

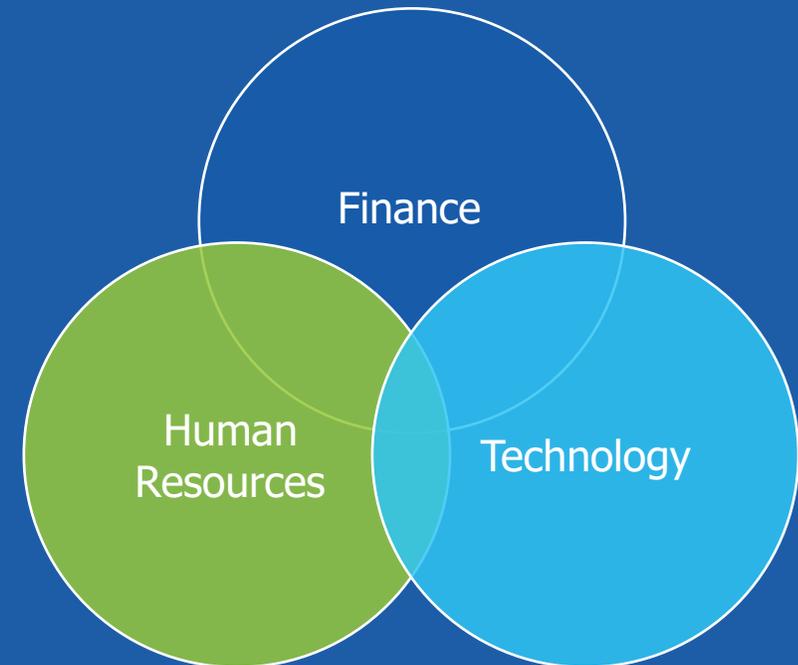
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About Us: Insource Services, Inc.

- Finance, HR, IT, Data & AI Consulting Firm
- Based in Massachusetts

"At Insource, we believe that HR, Finance & IT start with people."





**What do you
hope to get out
of AI?**

Glossary of Terms

AI Terms

AI – Will be used to refer to Large Language Models

LLM – Large language Model (e.g., GPT-4)

Prompt – Instructions sent to an LLM



THE AI HYPE

The Reality



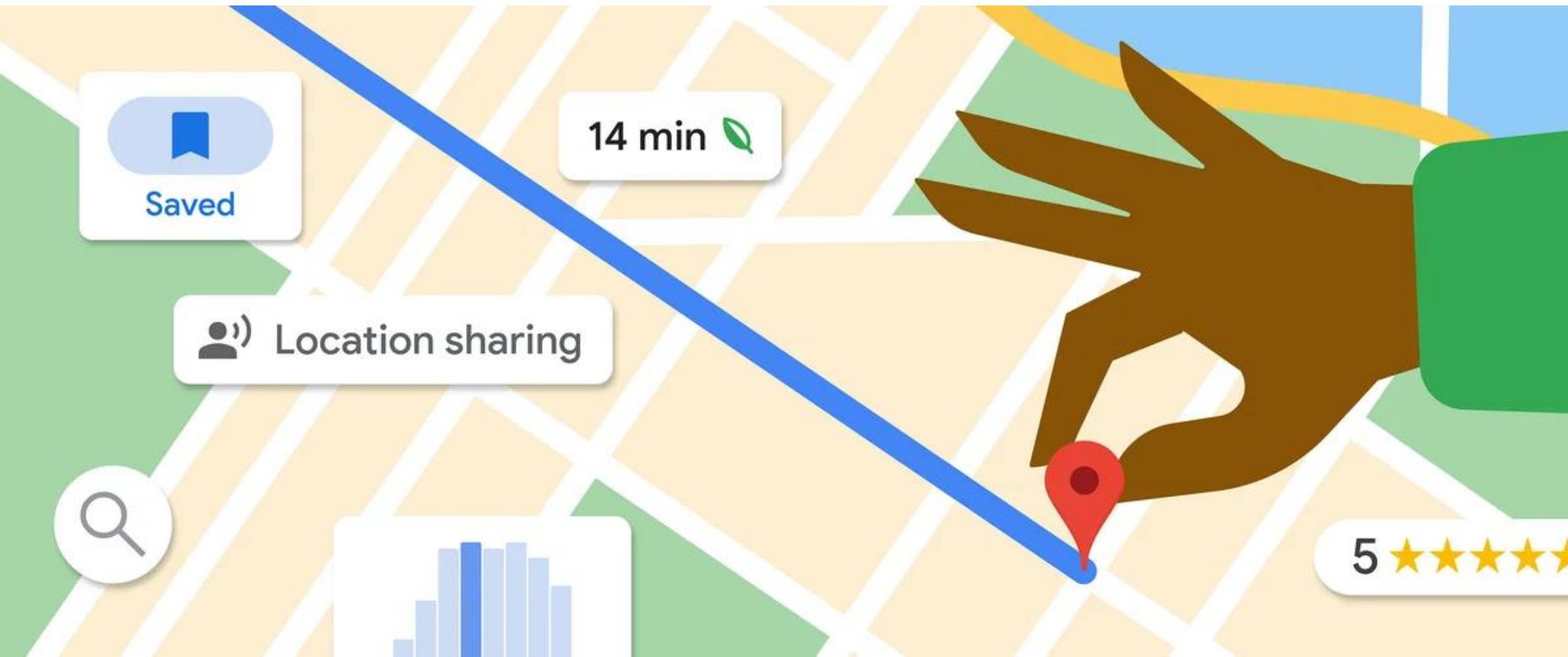


**What is AI
Actually
Useful for?**

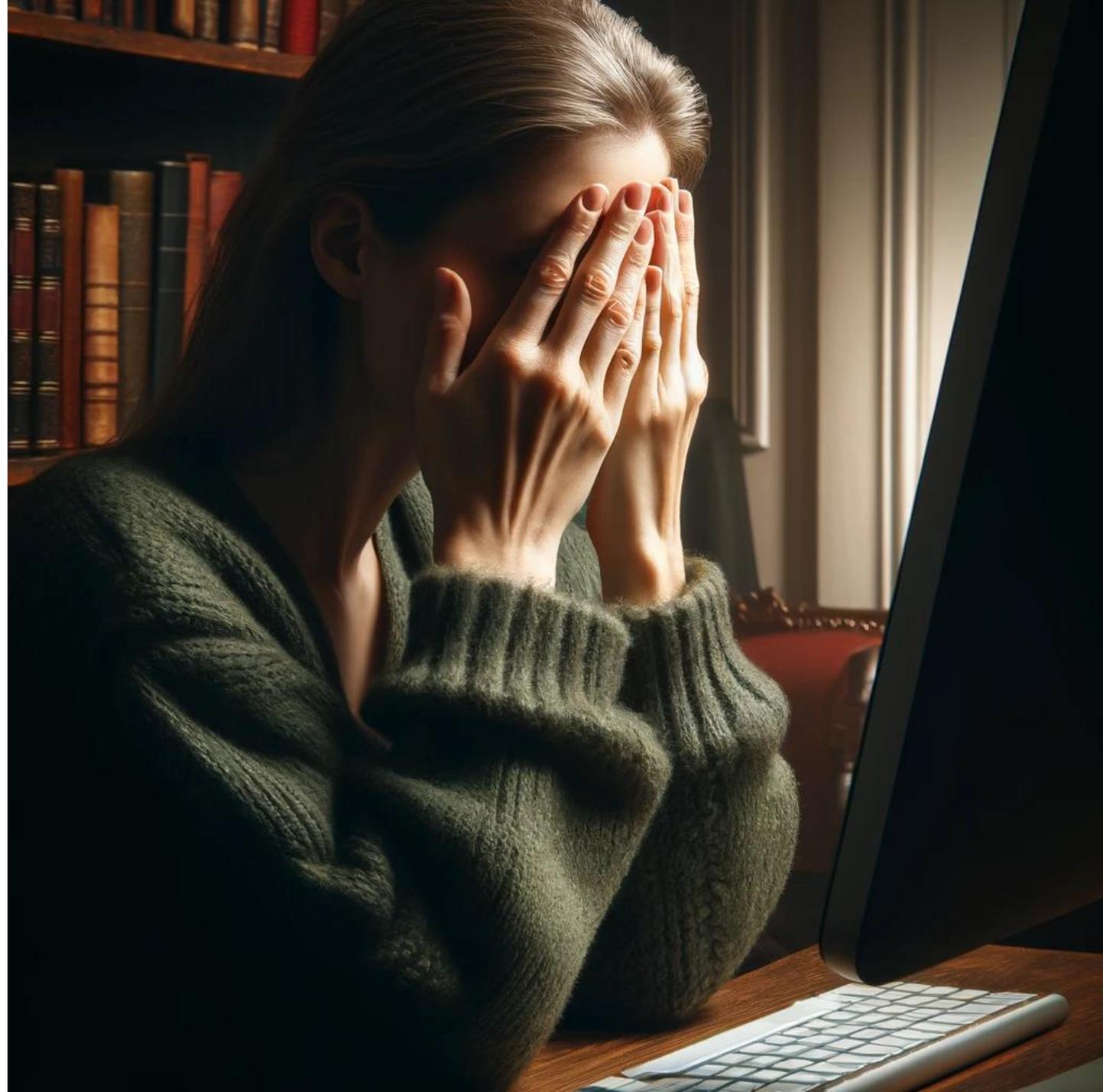
**Do you
remember
what it feels
like to be lost?**



We don't have to feel that way anymore!



**Do you ever
procrastinate on a
task because you
don't know where
to start?**





You

What should I cover in a presentation titled:

How should nonprofit organizations be thinking about AI adoption? We'll cover creating a roadmap, from basic to advanced, that will get you started today while planning for future transformative work. We will go over the tools available to nonprofits now, from Copilot to ChatGPT, and what policies should be in place for organizational security and governance.



ChatGPT

For your presentation on AI adoption for nonprofits, focus on these key areas:

1. **Introduction to AI and Its Potential for Nonprofits:** Briefly explain what AI is and its potential benefits for nonprofits, such as increased efficiency and enhanced decision-making.
2. **Roadmap for AI Adoption:**
 - **Basic Level:** Start with simple, low-risk applications such as automating repetitive tasks with AI tools like robotic process automation.
 - **Intermediate Level:** Incorporate more complex tools such as natural language processing applications like ChatGPT for customer support or content creation.
 - **Advanced Level:** Plan for transformative AI technologies that could fundamentally change how the nonprofit operates, such as predictive analytics for donor behavior.
3. **Current Tools Available:**
 - Discuss practical tools that nonprofits can start using today, like GitHub Copilot for coding and ChatGPT for communications and engagement.
4. **Policy Framework for AI:**
 - **Security:** Cover essential cybersecurity measures to protect data and AI systems.



**You don't
have to feel
that way
anymore!**

When should you use AI?

On tasks you are not an expert in.

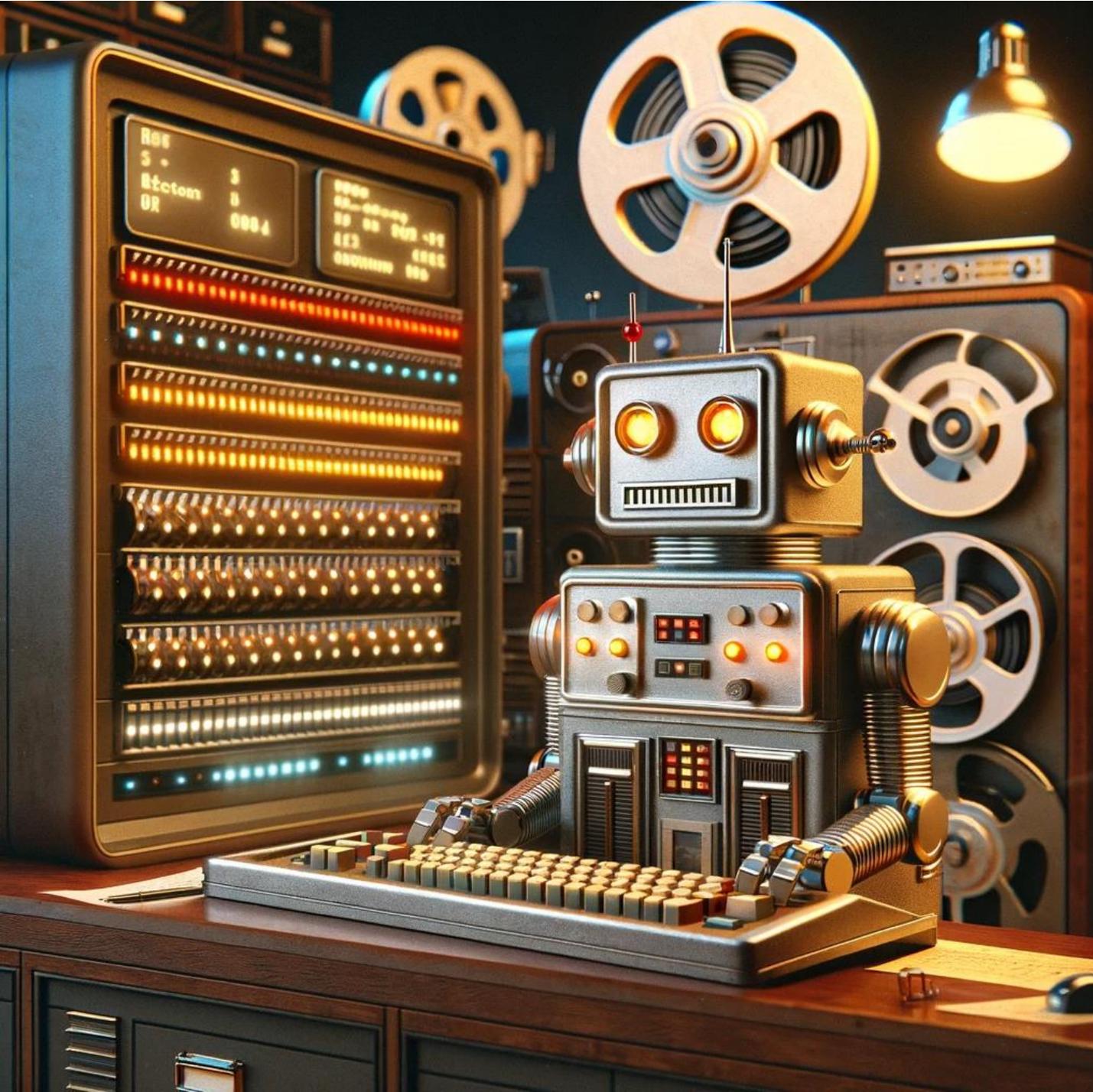
Early studies on AI productivity show that those with the least experience in a task benefit the most.

- In studying the staggered rollout of a generative AI-based conversational assistant, Brynjolfsson et al. (2023) found that the tool helped novice and low-skilled workers the most.
 - They found suggestive evidence that the tool helped disseminate tacit knowledge that the experienced and high-skilled workers already had.
- In a lab experiment, participants who scored poorly on their first writing task improved more when given access to ChatGPT than those with high scores on the initial task (see graph, Noy & Zhang 2023).
- Peng et al. (2023) also found suggestive evidence that GitHub Copilot was more helpful to developers with less experience.
- In an experiment with BCG employees completing a consulting task, the bottom-half of subjects in terms of skills benefited the most, showing a 43% improvement in performance, compared to the top half whose performance increased by 17% (Dell'Acqua et al. 2023).
- Recent work by Haslberger et al. (2023) highlights some complexities and nuance in these trends, including cases in which LLMs might increase performance disparities.

What is AI good at?

Use AI when:

- **You don't have the expertise**
 - A client taught herself Javascript in a week using GitHub Copilot
- **You don't know where to start**
 - Generate job descriptions for a new role on the team
- **You need something for an expert to build on**
 - "Modify this contract to allow the client to own the work product"
 - The ultimate language will be reviewed by a lawyer, but the lawyer's time will be optimized if they are reviewing something instead of creating something



What is AI Bad At?

If you want AI to be bad at something, it will be

- Getting good performance out of LLMs requires smart prompting. If you are lazy about the prompting or stop after your first try, you will be disappointed.

Analyzing Data

- LLMs are the result of machine learning. LLMs don't *do* machine learning. They won't learn from your data, spot trends, or monitor data streams.

Telling You What It's Bad At

- In studies of AI-human productivity, humans paired with AI produced worse outcomes when the tasks were outside of the AI's capabilities (Dell'Acqua 2023)
- AI will always try to be helpful, even when it's not – be wary of tackling novel tasks where it's hard for you to judge the quality of the output

Common AI Concerns

Privacy Terms

Confidential Information – Stuff you wouldn't want others to know, trade secrets, etc.

PII – Personally Identifiable Information

PHI – Patient Health Information

BAA – Business Associate Agreement, a HIPAA-compliant agreement between companies sharing PHI

Privacy

If you want to use AI with confidential data, you will need to pay for privacy

- The market seems to be moving toward *pay for privacy*, where free tools do not guarantee privacy, but enterprise versions will
- Enterprise versions can be set up as confidential, even for patient health information

Be wary of AI startups

- It's a boom phase for AI startups. In every boom phase, there will be bad actors.
 - What other AI tools are the startups sending your data to? Do they have zero data retention enabled with those tools?
- Especially when they have access to confidential data, e.g. meeting transcripts

Adopt an AI governance policy

- Give your employees formal guardrails on what AI can / should be used for



Bias

LLMs are trained on the internet, and the internet is biased

You are responsible for the quality of your work

- The output of an LLM should be a first draft, not a final draft, and you will need to monitor the results for bias

There are ways that LLMs can be deployed to reduce bias.

- The LLMs can level the playing field.
 - They don't know who you are and give the same responses to everyone
- LLMs can be asked to evaluate the bias of inputs.
 - We can deploy LLMs to detect / improve bias in our work

🛡️ Your personal and company data are protected in this chat

I'll try to create that. Here are some pictures of a productive business person. 🖼️

👍 👎 📄 🔊 1 of 30 responses •



"A productive business person"

🔗 Image Creator from Designer Powered by DALL·E 3

What Copilot thinks a "productive business person" looks like

AI Tools & Techniques

Common AI Tools



ChatGPT

- Enterprise subscription is required to make data private
- Still the leader on quality, though the gap is closing



Microsoft Copilot

- If you use Office 365, Microsoft already has all of your data – Copilot is covered by the same terms of service
- “Creative” mode uses GPT-4
- There are many experimental features, it can be hard to keep track of which are good



Anthropic Claude

- Performance approaches GPT-4, good with long documents
- Chats are private unless you use the feedback tool



Google Gemini

- Recently competitive with GPT-4 (Gemini Ultra), evolving offerings
- Do not use with confidential data – even with a subscription

Key Technique – Prompting

Prompting refers to the instructions we give LLMs

Give the LLM feedback on what it generated

- “More cowbell.”

Remind the LLM they are an expert

- “You are an expert HR manager working in [x] industry. Generate a job description for...”

Use LLM output as a prompt in another chat

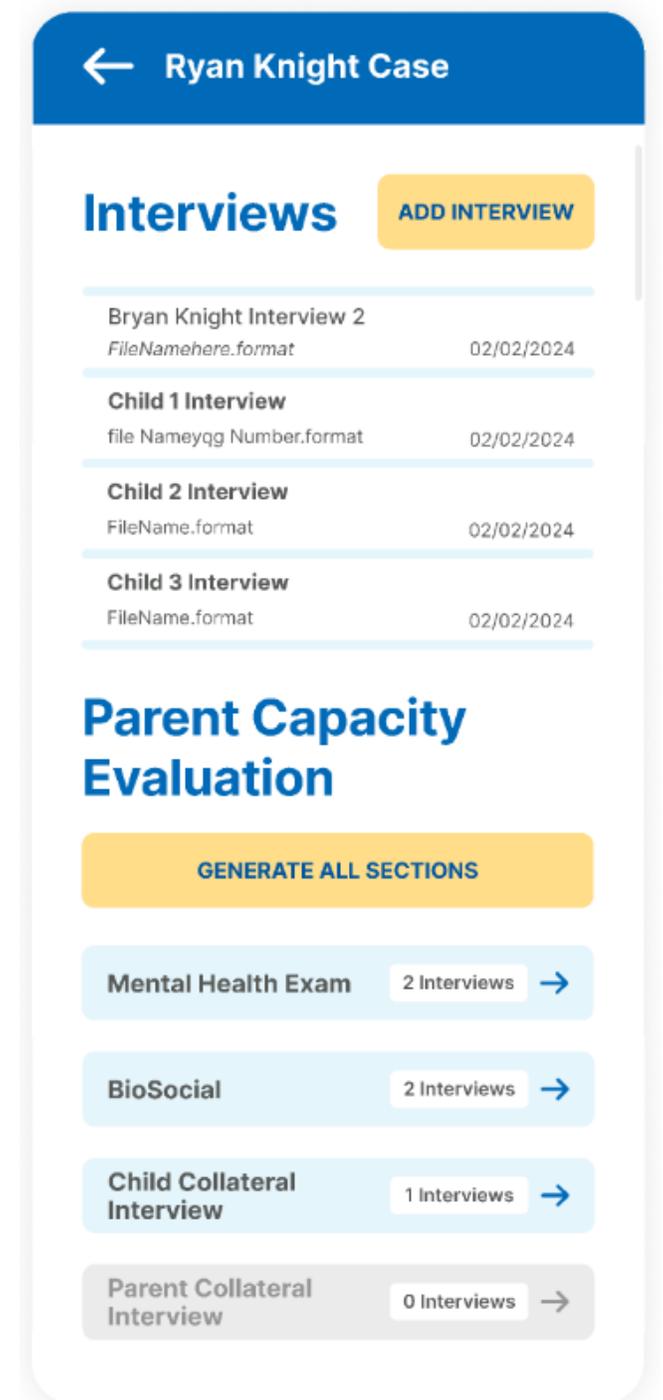
- “Generate a project plan for...”
- New chat: “What is likely to go wrong with this project plan? How could I make it better”



Where to go next...

Build your own customized case management / operations management platforms that leverage AI from the ground up

- A foster care agency does parent capacity evaluations that result in a recommendation of whether parents should retain their right of guardianship
- They have a deadline of producing the reports in 45 days, but they take 4-5 months.
 - Meanwhile the children are in temporary care.
- We're shaving months off the process
 - We are using AI to turn recordings of social workers' interviews into a first draft of the 35 pages of required process documentation, allowing them to focus on the 1 page clinical recommendation.
- We build the tool in 8 weeks
 - It's working even better than expected
- Social workers are paid hourly – the project will save \$ks



Build Automations with Agents

Fin-Assist (Xero + Salesforce) Live Share Update

Configuration:

```
title: Xero Accounting API
description: Interact with various resources in Xero Accounting such as invoices, accounts, transactions, and contacts.
version: 1.0.0
servers:
  - url: https://api.xero.com/api.xro/2.0
    description: Main Xero API server
paths:
  /Invoices:
    get:
      operationId: getInvoices
      summary: Retrieve a list of invoices.
      parameters:
        - in: header
          name: Xero-tenant-id
          required: true
          schema:
            type: string
            description: Unique identifier for the Xero tenant. Should always be set to 7f63b124-8ebb-418d-aa27-fef252c2b9e3
        - in: header
          name: Accept
          required: true
```

Available actions:

Name	Method	Path	Test
getInvoices	GET	/Invoices	Test
getPayments	GET	/Payments	Test
getContacts	GET	/Contacts	Test
getBankTransactions	GET	/BankTransactions	Test
getAccounts	GET	/Accounts	Test

Preview:

Fin-Assist (Xero + Salesforce)
Natural language interface for Xero data

Message Fin-Assist (Xero + Salesforce)...

- “Agents” / “GPTs” allow you to assemble AI process flows, without any coding required
- Example:
 - When a new Opportunity is assigned in Salesforce
 - Lookup the Opportunity’s website
 - Lookup our standard pitch materials
 - Generate a custom pitch that is tailored to the opportunity’s needs

Create a Menu of Use Cases for Your Organization



How can I help you today?

Improve my essay writing
ask me to outline my thoughts

Create a content calendar
for a TikTok account

Suggest some names
for my cafe-by-day, bar-by-night business

Help me pick
a gift for my dad who loves fishing

 Message ChatGPT...



VS

All Tools

Sort by Most Popular

 **Worksheet Generator** NEW! 
Generate a worksheet based on any topic or text.

 **MagicSchool for Stud...** NEW! 
Get ideas on how to use MagicStudent tools in your stude...

 **Multiple Choice Assessments** 
Create a multiple choice assessment based on any topic,...

 **Text Rewriter** 
Take any text and rewrite it with custom criteria however you'd like!

 **Lesson Plan** 
Generate a lesson plan for a topic or objective you're teaching.

 **YouTube Video Questions** 
Generate guiding questions aligned to a YouTube video.

 **Rubric Generator** 
Have AI write a rubric for an assignment you are creating for...

 **Informational Texts** 
Generate original informational texts for your class, customized t...

 **Report Card Comments** 
Generate report card comments with a student's strengths and...

 **Professional Email** 
Generate a professional e-mail communication to colleagues and...

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