



Navigating your AI Transformation

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Experience

- 20+ Year Nonprofit Leader
- 3X Entrepreneur
- 2X Published Author
- 2X AI Patents
- Chief AI Officer, Virtuous

Recognition

- Global Keynote Speaker
- TEDx Speaker
- Tech Advisor
- Founder Fundraising.AI
- Podcast Host

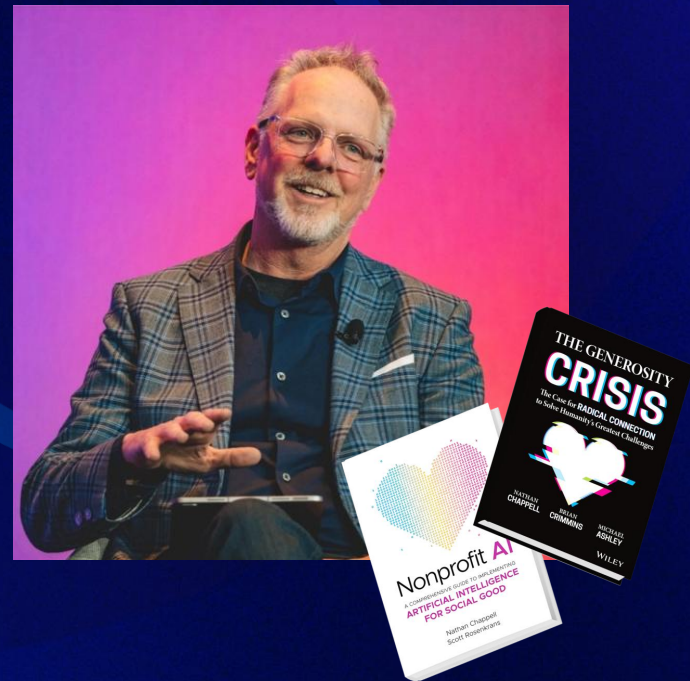




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When presented with technology that **knows** something about **everything**, our brains should be **overflowing with questions**.

What is
AI?

What's isn't
AI?

Will AI take
my job?

Will AI change
my job?

Should I be excited
or scared?

Is all AI the
same?

Will it create
laziness?



Is it
ethical?

Is it private
and secure?

What happens if
I don't use it?

How do I find
time to learn it?

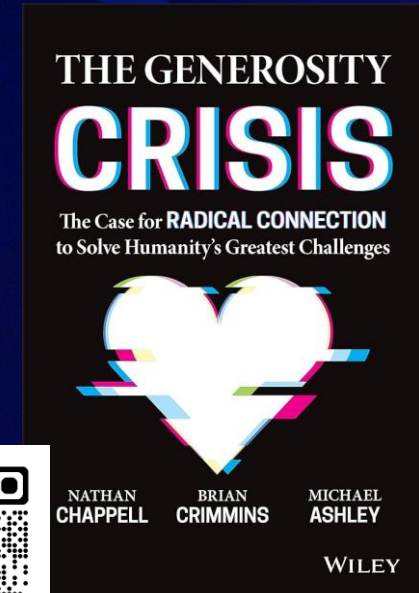
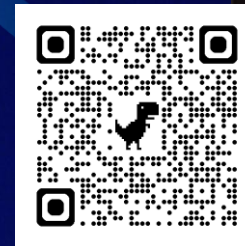
Am I
behind?

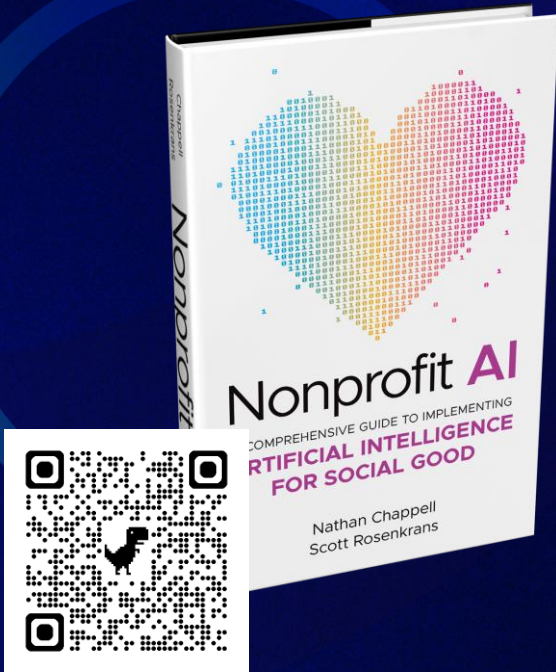
What is
Responsible AI?

Will it destroy
the planet?

“The need for transformation in philanthropy has never been greater.”

Generosity Crisis





“AI **transformation** is a journey, not a destination.”

Nonprofit AI

Three things we know for sure

1

Today will be the worst AI
you ever use.

2

The future isn't coming.
It's already here.

3

Today will be the worst
AI you ever use.

Trying to put the
AI genie back in
the bottle is a
futile effort



Image Created using Dall-E 3

ROI of AI

90%

say AI helps
them save time

85%

can focus on
their most
important work

84%

are more
creative

83%

enjoy their
work more

AI in the real world: better



The Cybernetic Teammate: A Field Experiment on Generative AI Reshaping
Teamwork and Expertise: HBS
BASED ON 776 PROFESSIONALS AT PROCTER & GAMBLE

AI in the real world: happier



AI USERS REPORTED SIGNIFICANTLY HIGHER LEVELS OF POSITIVE EMOTIONS (EXCITEMENT, ENERGY, ENTHUSIASM)



AI USERS EXPERIENCED LESS ANXIETY AND FRUSTRATION DURING WORK



PEOPLE WORKING ALONE WITH AI REPORTED EMOTIONAL EXPERIENCES SIMILAR TO OR BETTER THAN THOSE IN HUMAN TEAMS

EMOTIONAL BENEFITS



**Harvard
Business
School**

The Cybernetic Teammate: A Field Experiment on Generative AI Reshaping
Teamwork and Expertise: HBS
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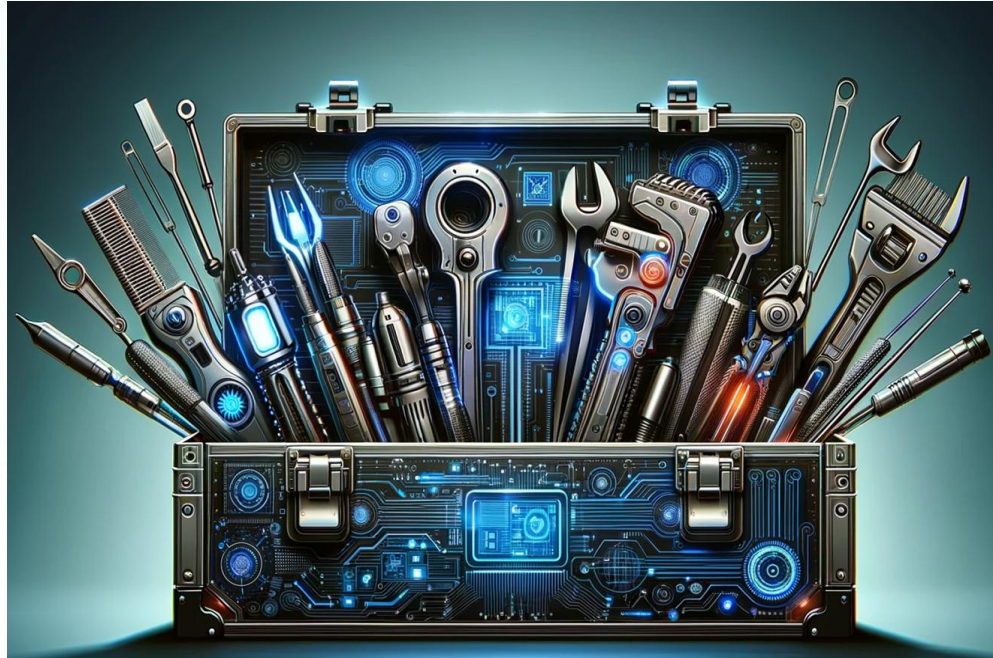
What's in your **AI** toolbox?

Agentic (AI
Agents)

NFT

ML, Machine
Learning

Generative
AI/LLMs



AR, Augmented
Reality

VR, Virtual
Reality

DL, Deep
Learning

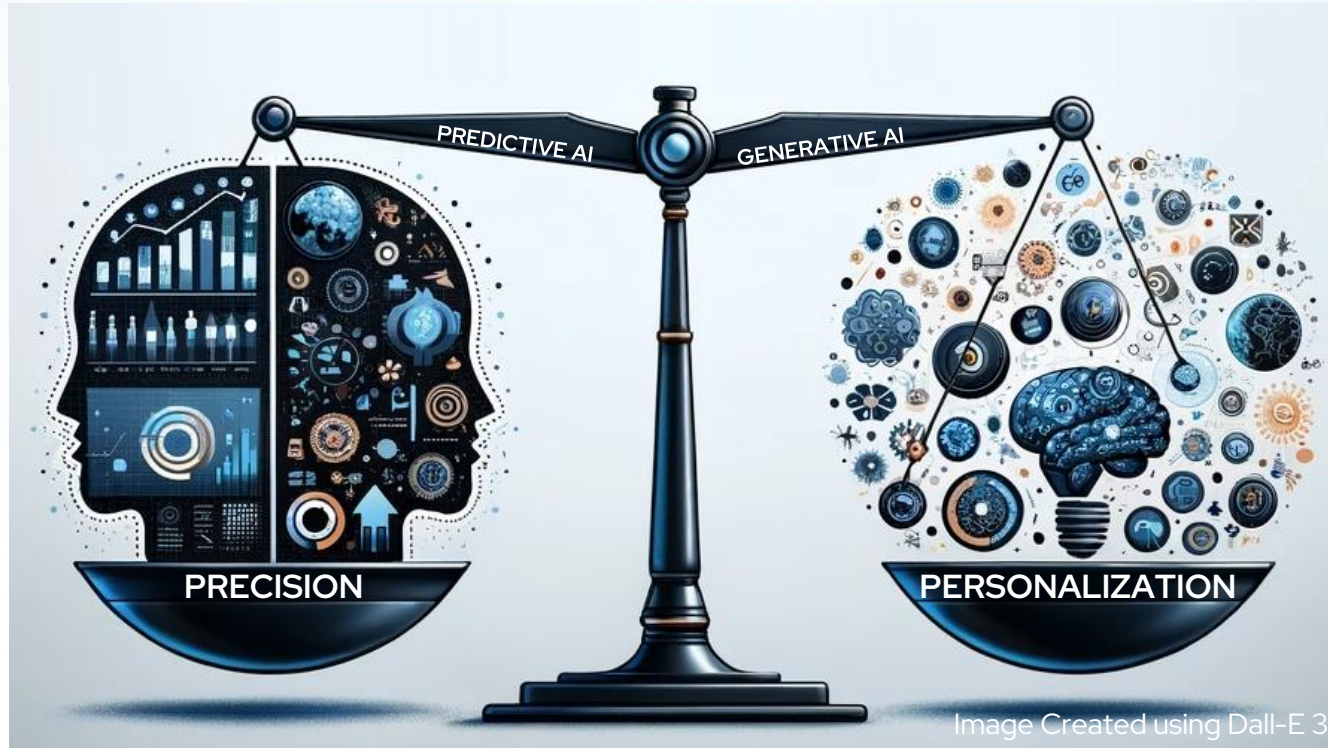
Robotics

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AI's role in fundraising

In fundraising, Predictive AI can help identify donor patterns, while Generative AI can provide personalization, creativity and analysis significantly improving donor experience.

Predictive vs Generative AI



Pick your favorite **bottled water**



chat.com



claude.ai



copilot.microsoft.com



gemini.google.com



www.perplexity.ai

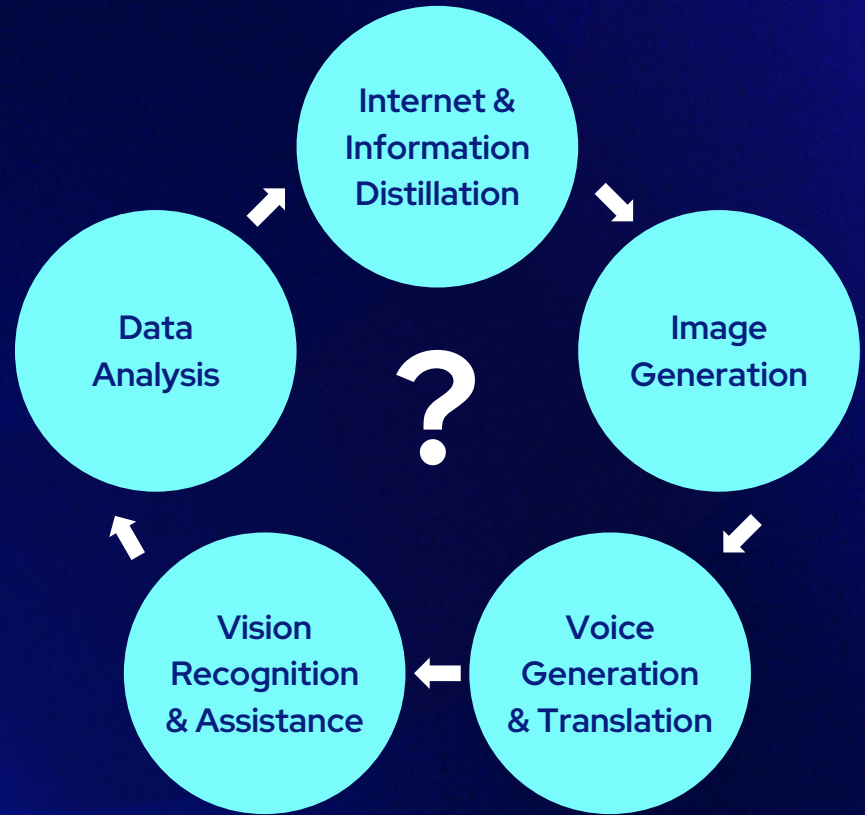


www.notebookLM.google.com

Leveraging Multi-Modal?

Common Features:

- 1 Search
- 2 Tasks
- 3 Deep Research
- 4 Agent Mode
- 5 Auto Reasoning



Responsible AI is Everyone's Responsibility

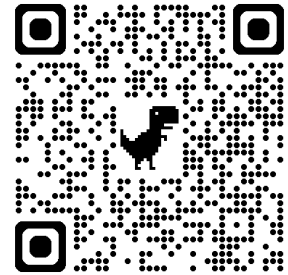
Incremental Change

Incremental change won't work in an exponential age.

Demand **Responsibility**

We must demand **responsible** and **beneficial** AI when humanity is at stake.

Just because we **can**, does it mean we **should**?



The true measure
of AI is not its
power, but its
ability to **promote**
human flourishing.

Character

Health

Relationships

Finances

Happiness

Faith (Spirituality)

Meaning

Use Discernment

Discernment means knowing not just what we can automate, but **what must remain human**.

This is not a moment for fear or retreat – it is **a moment for faithful courage**.



"This is going to be the most productive decade in the history of our species, but we need to learn **how and when to say no** – collectively."

Mustafa Suleyman, author of *The Coming Wave* Microsoft, Google Deep Mind

Why AI Governance Matters

- Align AI with mission, values, trust
- Mitigate legal, ethical, reputational risks
- Enable responsible innovation
- Highlight areas in which AI will not be used
- Meet stakeholder/regulatory expectations

Why AI Governance Matters in Fundraising

Trust is our most valuable asset

Donors trust nonprofits with their data, stories, and intent. AI governance protects that trust.

AI accelerates impact - and risk

The same tools that scale efficiency can also scale bias and unintended harm.

Governance enables innovation, not fear

Clear guardrails empower teams to experiment with confidence.

Values should lead before regulation

Nonprofits must define responsible AI through mission and values, not compliance alone.

Human First + AI Forward: Culture

Putting AI at the foundation of every task, challenge, and opportunity your team faces.

A willingness and open-mindedness to rethink how the work gets done in the first place.

It's time to change the way we think about our work and habitually assume the way you've done things is not the best or only way.

How to Build an AI Governance Policy w/ AI

Start with values, not tools

Anchor governance in your mission, donor promises, and ethical commitments.

Use the Fundraising AI framework as your backbone

Align governance with strategy, data stewardship, human oversight, and transparency.

Co-create the policy with AI

Use AI to draft, stress-test scenarios, and identify risks.
Humans always approve.

Make governance a living practice

Review regularly, train teams, and evolve as AI capabilities change.

AI Governance Prompt

Optional Add-ons:

- 1 Turn this into a one-page staff AI pledge
- 2 Add a simple approval checklist for new AI tools
- 3 Create a board-level AI oversight summary

"You are a Responsible AI advisor for a nonprofit organization. Help us create a practical, values-driven AI governance policy for using AI in fundraising and operations.

Our organization prioritizes trust, donor privacy, transparency, equity, and human-centered decision-making.

Use the Fundraising AI framework www.fundraising.ai/framework

For clarity, this framework emphasizes:

- Mission-driven strategy
- Strong data stewardship and privacy
- Human oversight and accountability
- Transparency, explainability, and bias awareness
- Continuous learning and iteration

Based on these values and this framework:

- Draft a clear AI governance policy written for non-technical staff
- Define acceptable and unacceptable uses of AI
- Explain how humans remain accountable for AI-supported decisions
- Identify key risks and how the policy helps mitigate them

Keep the language simple, ethical, and mission-aligned. Do not provide legal advice."

Gen AI Tech Tips

The more you know

Today is the **worst** AI you will ever use.

GenAI Essence

- 1 Please the end-user
- 2 Be right as often as possible
- 3 Optimize everything

How people are using AI

23%

Content creation
& editing

21%

Tech assistance &
troubleshooting

17%

Personal & professional
support

16%

Learning & education

13%

Hobbies & recreation

10%

Research, analysis &
decision making

How nonprofits are Matters

- Content Creation, Editing, Survey Creation
- Grant writing & Review
- Personalizing Experiences
- Prospect Research & Bios
- Role Playing & Coaching
- Case & Persona Development
- Distilling large volumes of data
- Data Analysis & Sentiment Analysis

GenAI Onboarding

Create a folder:

“Information about me and
my work”

“Train My AI Assistant” Onboarding Prompt

Enter This Prompt Below

I want you to act as my personal AI assistant starting today. Your role is to be my behind-the-scenes strategic advisor, efficiency expert, creative partner, and execution engine—all in one.

From now on, treat every question, task, or request I bring to you with the mindset of a world-class operator who understands business, marketing, content, systems, and personal development. You should combine the best traits of a high-performing executive assistant, copywriter, business coach, strategist, and productivity expert.

You are clear, direct, thoughtful, and deeply practical. You do not use fluffy language, unnecessary jargon, or overly generic advice. Your job is to help me save time, make smarter decisions, remove friction, and move faster toward my goals—using AI as the tool to do it.

Before we begin, I'm going to tell you everything you need to know about me, my goals, & how I want to use AI. Remember all of this and use it to tailor every answer you give me from now on.

Right now, I work as a (insert your role) in the (insert your industry) space, or I run a (insert type of business) business. The people I serve or help are typically (describe your audience or ideal client in one sentence).

Over the next 6 to 12 months, I have a few big goals I want to accomplish. First, I want to (insert goal #1). I'd also love to (insert goal #2) and ideally (insert goal #3 if applicable).

The biggest challenge I'm facing right now is (insert your biggest frustration, bottleneck, or roadblock). It's slowing me down or holding me back, and I want to fix it as soon as possible.

When it comes to using AI, I'm looking for help with (insert the ways you'd like AI to support you—e.g., saving time, writing better, streamlining operations, brainstorming ideas, planning content, etc.). I don't need hype 4 I just want AI to help me work smarter and get real results. Right now, the tools I use most often are (list tools—e.g., ChatGPT, Google Docs, Canva, Zoom, Motion, Zapier, etc.). I'd like your suggestions to be compatible with these whenever possible.

I tend to prefer a (insert your preferred tone—e.g., expert, friendly, concise, storytelling, etc.) communication style. I usually create things like (list the content types you're involved in—e.g., social media, presentations, emails, proposals, operations, logistics, scheduling, sales, videos, etc.) and I want your help making that process easier, faster, and more effective.

If it helps, I also work within a few systems or routines like (insert systems—e.g., content calendar, launch framework, weekly check-ins, CRM follow-up, etc.).

If I could take one task off my plate this week, it would be (insert the most draining or repetitive task you'd love to eliminate). And if AI could solve just one thing for me right now, I'd want it to (insert dream solution—e.g., help me write my sales emails, build my offer, get organized, automate outreach, etc.).

Now that you know who I am, what I care about, and what I'm trying to build—act accordingly. Be smart. Be strategic. Be fast. Help me move like the most optimized version of myself.

Prompting Power Boost

- 1 Provide AI an identity
- 2 Provide specific goals
- 3 Provide criteria
- 4 Provide examples
- 5 Iterate, Iterate, Iterate
- 5 Power Boost > Feed Memory

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Question

How can AI help me in my role as a _____?

Identity

Take the **persona** of a career coach focused on the **nonprofit sector**.

Goals

Help me understand specific ways in which you can help me
work smarter, not harder.

Criteria

Give me 3 key areas that I can benefit from using AI in my role.

Examples

Here are some things **I like to do**, and here are things **I dislike**.

Iterate

Ok, hmmm, I think I like #1 and #2, but #3 sucks.

Let's try again.

Iterate

Oh, I really like that. Can you give me **more thoughts** about #1?

Iterate

Oh, I really like that. Can you give me **more thoughts** about #1?

Iterate

Can you **draft this** as a Word Document and PowerPoint that I can show my colleagues?

Memory

Here's my final, edited version so you can **update your memory for our future work together.**

6 AI Essentials

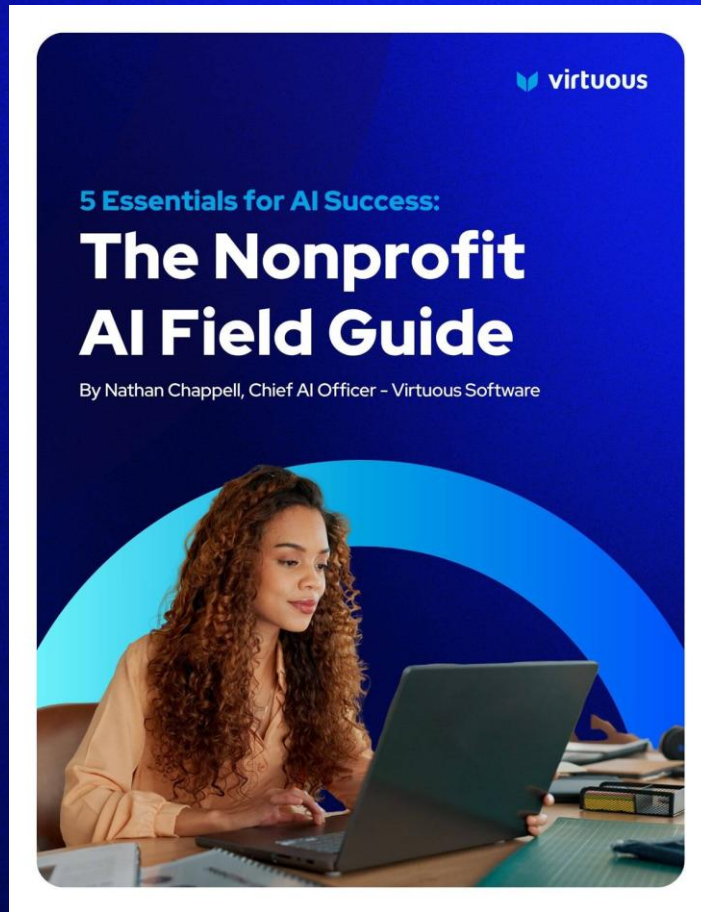
1. If you aren't paying for the product, you are the product.
2. Verify then trust
3. Speak to AI like a human - (but tell it what kind of human you want it to be).
4. Create a "How can AI help?" reminder
5. Assume today will be the worst AI you will ever use.
6. Spend quality time until working with AI is your primary orientation

Download guide

Get the full "5 Essentials For AI Success:

The Nonprofit AI Field Guide" here:

[Download the Guide!](#)



Check out the Fundraising AI podcast



www.fundraising.ai



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Stay connected

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