

DARIAN RODRIGUEZ HEYMAN & CHERYL CONTEE

AI FOR NONPROFITS

Putting Artificial Intelligence to
Work for Your Cause

Practical tips and tools for strategic fundraising,
marketing, programs, and back office operations

WILEY

AI

FOR
NONPROFITS

**DARIAN RODRIGUEZ HEYMAN &
CHERYL CONTEE**

**Foreword by Jonathan Brill
Afterword by Blaise Agüera y Arcas**

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I dedicate this book to my incredible son, Rafael. Rafi, my love for you has served to deepen my commitment to helping usher in the thriving, equitable, and just world I know is possible. You deserve no less and I'm only sorry this book doesn't have more math in it!—DRH



I dedicate this book to my son, Colm Contee. Buddy, you are the future we've all been waiting for. Being your mom has made me a better person and every day I learn something, create something, or imagine something new with you. I hope this book inspires you and your peers to use innovation to build a better world not only for yourselves but also for everyone. Special shoutout to my brother Clarence Contee Jr., who has been my rock through both sunny and rainy days. Honorable mention to Fluffy and his warm companionship while I was writing! —CC

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Foreword

Your Future Is NOW

The future isn't just something that happens—it's something we create with every action we take. I've spent my career helping leaders anticipate and adapt to the turbulence of exponential change, and there's no question that AI is one of the most significant forces reshaping our world today. ***The remarkable surge of AI capabilities in the last few years is unlocking advancements poised to transform every corner of our society—including the nonprofit sector.*** *AI for Nonprofits* arrives at precisely the moment when nonprofit executives, social entrepreneurs, and philanthropists need actionable guidance on how to harness the power of intelligent systems for social good.

Our world is more interconnected than ever before. The challenges we face—climate change, income inequality, public health crises—are increasingly complex and intertwined, and the need for innovative solutions has never been more urgent. In the technology realm, ***AI stands out as a game changer for two main reasons: its ability to process massive amounts of data in real time and its capacity to transform that data into decisions, predictions, and insights at scale.*** From my vantage point as a futurist, I see AI as an extraordinary lever for change. But just as important, I see it as a tool that can liberate our most human qualities of compassion and creativity by reducing the complexity and repetition in our work.

The question I most often hear in my discussions with corporate executives and nonprofit leaders is, “How do we begin?” It's a fair concern, given the pace of transformation. In response, I always share the need to ***break AI adoption into manageable steps: start by clarifying your mission and objectives, then identify specific pain points where AI-driven solutions might be beneficial, and***

finally, cultivate a culture of experimentation. This book provides a tactical road map for doing exactly that.

At the heart of this road map is the idea that AI is not an end in itself. Yes, it's a powerful tool—one that can reduce the time staff spend on repetitive tasks, improve donor engagement, identify at-risk communities earlier, and free up valuable resources for the frontline work that truly matters. Yet technology is only as effective as the humans behind it. I often remind organizations that while we use AI to automate, accelerate, and amplify our capabilities, it's our people and our values that give technology its meaning. ***AI for Nonprofits shows you not just how to adopt new tools, but how to integrate them holistically into your mission, preserving the best of what makes your organization human and mission-driven.***

One recurring theme from my interviews with social sector executives is the reluctance some leaders feel about AI. They worry about biases in algorithms or fear that advanced technologies might distract from their nonprofit's human-centric mission. These concerns are real and legitimate. The solution is to lean in, not step away: by understanding AI's strengths and limitations, you equip your organization to steer AI in an ethical and inclusive direction. ***This book emphasizes best practices for transparency, accountability, and responsible innovation—keys to ensuring AI supports, rather than supplants, the values at your nonprofit's core.***

In my work, I often talk about “futureproofing” organizations—identifying ways to stay resilient and adaptable in times of uncertainty. In the nonprofit world, *futureproofing* means staying relevant and impactful in the face of rapidly changing social and technological realities. ***AI might not solve every challenge, but as you'll discover in this book, it can dramatically increase the speed and scale of solutions that do.*** With the right guidance and governance, AI becomes a force multiplier for every cause.

As you explore the pages of *AI for Nonprofits*, you'll learn the fundamentals of AI, unpack the jargon that often confuses leaders, and walk through practical case studies of how nonprofits across different sectors are transforming their strategies. You'll see ***real-world examples of how AI enhances donor outreach, reduces operational costs, and strengthens program delivery.*** You'll discover strategies to unleash the potential of your team: freeing staff from repetitive tasks, tapping into new insights

from the wealth of data you already have, and creating more dynamic relationships with the communities you serve.

Above all, my hope for you, as you read this book, is that you'll cultivate an *innovator's mindset*—a willingness to explore, iterate, and learn alongside your colleagues. AI is still evolving. ***The ultimate competitive advantage in the social sector will go to those who lean into this new frontier with curiosity, creativity, and courage.*** In my experience, the most promising organizations recognize that the best time to prepare for the future is *now*.

In these pages, you will find not only the technical and tactical guidance to make AI a driving force in your nonprofit, but also the inspiration to reimagine what's possible. I'm convinced that AI, when wielded responsibly, will unlock the full potential of your team and significantly amplify your impact—helping humanity take leaps forward in our quest to create a more equitable, thriving world.

So, let's get started on this journey! ***The insights and practical tools ahead are designed to fuel your mission, elevate your strategies, and catalyze the next era of nonprofit innovation.*** In my conversations with nonprofit leaders, I am often reminded that every bit of technological progress is ultimately about improving lives. AI is the frontier that can propel us to greater collective good, if we embrace its possibilities.

The future is now. Let's shape it together!

Interviewee Bio

Jonathan Brill is a renowned futurist, strategic advisor, and author committed to helping organizations navigate uncertainty and prepare for disruptive change. As the former global futurist at Hewlett Packard and author of *Rogue Waves*, he has guided nonprofits, global brands, and government agencies to anticipate, adapt, and thrive amid emerging challenges. His expertise lies in scenario planning, innovation strategy, and leveraging AI-driven insights to craft resilient road maps for the future. A trusted advisor to Fortune 500 leaders and a sought-after keynote speaker, Jonathan's thought leadership empowers nonprofits to embrace uncertainty as an opportunity to strengthen their strategies and serve their communities more effectively. <https://www.linkedin.com/in/jonathanbrill1/>

About the Book

“You don’t need to know all the answers; you just need to know where to find them.”

—Albert Einstein

In November 2022, the launch of ChatGPT 3.5 changed everything. More than just the fastest technology to reach 100 million users, which it did in just two months, it marked a tipping point: a moment when artificial intelligence (AI) became accessible to everyone through simple, conversational interactions. Beyond offering the world’s knowledge at your fingertips, AI now acts as a virtual assistant capable of helping you brainstorm, create, predict, and execute with unprecedented ease. It’s no exaggeration to say we are all now living on the jagged frontier of this technology with a rapidly evolving future ahead.

For nonprofits—particularly grassroots organizations often stretched thin on time, staff, and resources—AI isn’t just another tool. This is an opportunity to rewrite the rules. ***AI is a Swiss Army knife for the social sector, with three primary capabilities:***

- **Streamlining tasks:** From drafting emails and summarizing reports to automating workflows, AI can save countless hours and let you focus on what matters most.
- **Enhancing creativity:** AI can brainstorm with you, offering fresh ideas for outreach, fundraising, campaigns, and strategies you might not have considered.
- **Seeing into the future:** Through predictive analytics, AI can identify patterns and anticipate challenges, giving you insights to make data-driven decisions.

In short, AI can amplify your efforts in ways previously unimaginable. The question is, “Where do you want to point that thing?”

Book Purpose and Flow

This book exists because nonprofits are at a crossroads. With urgent community needs and the ever-present challenge of doing more with less, ***it’s critical to harness the tools that can make your work more efficient and effective.*** Yet AI—and the technology landscape overall—changes fast. How can we offer guidance that stays relevant in a rapidly evolving field?

The answer is simple: we focus on what’s *timeless*. Instead of detailed how-tos on specific platforms, ***this book provides real-world strategies, best practices, and tactical tips and tools that empower you to approach AI adoption with confidence.*** Whether you’re looking to raise more money, expand awareness, enhance programs, or streamline operations, the chapters ahead will give you the foundation to get started.

This book begins with a foundational section designed to help you set the stage for success. You’ll find essential guidance on understanding AI basics, preparing your organization for adoption, crafting a strategic plan, and building the confidence to use AI effectively. Through these, we provide you with the groundwork needed to approach AI as a partner in your work.

The core of the book focuses on four key areas where AI can make the most significant difference:

- **Fundraising:** Discover how AI can help identify prospects, build relationships, and optimize your development efforts with both donors and funders.
- **Marketing and community engagement:** Learn how to connect with your audience more effectively, amplify your message, and foster deeper relationships.
- **Program delivery:** Explore how AI can enhance service design, improve outcomes, and scale your impact.

- **Back-office operations:** Reduce administrative burdens and streamline essential functions like HR, finance, and board engagement.

Beyond these core areas, *the book also addresses three critical supplemental topics:*

- **Policies and protections:** Guidance on implementing AI responsibly and ethically, with tools to mitigate risks and align your efforts with your mission
- **AI for other mission-led organizations:** Tailored advice for foundations and donors, social enterprises, and higher education institutions, showcasing how they can apply these strategies in their unique contexts
- **Resource directory:** A curated list of tools, platforms, publications, and providers to support your AI journey, helping you stay informed and equipped to adapt as the landscape evolves

Together, these sections form a comprehensive road map for nonprofits seeking to harness the potential of AI. Whether you're just starting out or looking to refine your approach, this book offers the insights and strategies needed to build a brighter future for your organization and the communities you serve.

How to Use This Book

Think of this book as your AI owner's manual. It's not meant to be read cover-to-cover unless that suits your style. Instead, *approach it as a reference guide: dip into the chapters that address your current challenges, and revisit them as your needs evolve.*

Each chapter is structured consistently to maximize your time and impact:

1. **Introduction:** A quick overview of why the topic matters
2. **Critical skills and competencies:** Tactical tips and tools, plus frameworks to guide your adoption of AI
3. **Pitfalls and solutions:** Common missteps and how to avoid them
4. **Road map to the future:** Emerging trends and how to stay ahead

5. **Dos and don'ts:** Bite-sized, actionable takeaways underscoring key insights from each chapter
6. **Conclusion:** A recap of key points to leave you inspired to action
7. **Resource review:** Publications, platforms, and tools to explore further

Some chapters also feature insets on relevant subtopics and case studies to showcase real-world examples and inspire new ideas.

A Note on Formatting

We know you're busy. To help you get straight to the point:

- ***Bold italics*** highlight actionable tips and key takeaways.
- **Bold** text signals section headers or list introductions.
- *Italics* emphasize suggested AI prompts or specialized terms.

AI Disclosure

In an effort to practice what we preach, ***we used AI extensively when producing this book***. This was in part to walk in the shoes of nonprofit leaders and understand from experience what works, what doesn't, and what's coming soon. Specifically, we used Fireflies.ai to record and automatically transcribe our virtual Zoom interviews with all 57 experts. We then used ChatGPT, Claude, and our publisher Wiley's private large language model Scribble to help draft all book content based on the interviews with author edits, and once again to integrate feedback and proposed edits from our interviewees. Craig Johnson, one of our experts, adapted his software, Change Agent AI, to help analyze our manuscript, facilitating the creation of our glossary of terms. Please note however that ***we remained the humans in the loop (HITL) at all times***. Every single page of this book received human attention in review and editing. AI is inescapable in modern society and functions behind the scenes in more ways than most people may realize in daily life. Yet it's how humans adapt this multipurpose utility knife, especially generative AI, that will determine our future.

On behalf of the 57 expert contributors who helped shape this book, we hope these insights empower you to make a greater impact. ***While no book can answer every question, this one is designed to provide you with a solid foundation for using AI to further your mission.*** Together, let's work smarter, dream bigger, and build a better world.

Acknowledgments

It truly takes a village. This book is the result of countless hours of hard work and dedication—not just from the two of us, but from an incredible community of supporters who made this effort possible.

First and foremost, we want to express our deepest gratitude to the 57 extraordinary individuals who shared their hard-won insights, savvy suggestions, and practical wisdom. Your insightful contributions serve as the cornerstone of this work, enabling us to provide actionable tools and strategies for nonprofit leaders. Thank you for your shared dedication to strengthening the social sector and for offering your expertise to support others during this pivotal moment in the adoption of AI.

We also owe a heartfelt thanks to our families, whose support and understanding made it possible for us to devote so many hours to this project—often well beyond the demands of our day jobs. Your grace and encouragement have been invaluable.

Special thanks go to Gabriella (Gabby) De La Cruz, Sonam Tsering, Zach Bell, and Raina Pahade for their indispensable aid coordinating and managing this complex undertaking. Your efforts and ideas helped make this book possible! Much gratitude to the staff and board of The Impact Seat Foundation and Egeria Enterprises for their support during the intensive process of interviewing, writing, and editing for this project. Much appreciation and awe to Craig Johnson of Change Agent AI who applied his team's frontier tech to help us create a glossary of terms to ensure everyone's maximum understanding. We are also deeply grateful to our team at Wiley for their enthusiasm, dedication to nonprofit capacity building, and patience as we brought this community-centered vision to life.

Finally, to all the nonprofits tirelessly working to build a better world: thank you! And to you, our reader: we know the demands on your time are immense as you tackle pressing community needs every day. The fact that you've chosen to invest time in building your capacity and exploring how AI can amplify your impact speaks volumes about your leadership, foresight, and commitment. We hope this book serves you well on that journey.

Together,
Darian and Cheryl

Introduction to AI: Laying the Foundation for Responsible Adoption

“Knowledge corresponds to the past. It is technology. Wisdom is the future. It is philosophy.”

—Herbie Hancock, legendary American jazz artist and
UNESCO Goodwill Ambassador

AI is not a distant future—it’s here, now, transforming how nonprofits operate. Whether you’re drafting grant proposals, engaging donors, managing programs, or streamlining operations, AI has the potential to revolutionize every aspect of your work. But ***realizing this potential isn’t just about knowing the tools; it’s about using them thoughtfully and responsibly.***

This opening section lays the groundwork for your nonprofit’s AI journey. It equips you with the knowledge, frameworks, and practical strategies to start strong and avoid common mistakes in AI adoption. Each chapter provides a critical piece of your foundation, ensuring you adopt AI in ways that align with your mission, maximize your resources, and amplify your impact.

Part I begins with “The Future Is Now: AI 101, the Basics,” where we break down the basics of AI—what it is, how it works, and why it’s an incredible resource for nonprofits. From there, “Before You Get Started” guides you through assessing your organization’s readiness for AI adoption, with a practical framework for understanding the chapter inset, “Understanding the AI Adoption Life Cycle,” to help you move from experimentation to implementation with clarity and confidence.

The “90-Day Blueprint for AI Success” offers a step-by-step road map for launching your AI journey. The inset “Key Ingredients for AI Adoption Success” introduces the mindset, skill set, and tool set framework that ensures you’re setting your nonprofit up for long-term success. “Adapting and Thriving in the Age of AI” explores how nonprofits can foster a culture of experimentation and resilience, staying ahead in a rapidly changing landscape, and it includes a case study showcasing how the Michael J. Fox Foundation leveraged emerging technology to advance its mission.

In “How to Sell AI Upstream and Downstream Within Your Organization,” we address the critical challenge of securing buy-in, offering strategies to bring your board, leadership, and staff along on the journey. The inset on “AI as Your Institutional Memory” supports the case for adoption by speaking to the benefits of AI as it relates to helping your nonprofit learn from past efforts to support strategy development and programs.

Once you’re ready to select tools, “AI and Technology Planning: Figuring Out Your Tech” provides guidance for choosing platforms that align with your needs, including the inset “Guidelines for AI Vendor Selection” to help you evaluate potential partners. “Prompt Engineering: Asking AI the Right Questions” dives into how to communicate effectively with AI, featuring a case study that speaks to how a small nonprofit built a private large language model (LLM) “staffbot” to streamline their operations, raise awareness, and support fundraising.

These chapters were chosen and crafted consciously, aimed at collectively equipping you with the knowledge, tools, and confidence to embrace AI as a partner in your work. Whether you’re taking your first steps or refining your approach, this foundational section ensures your nonprofit is prepared to leverage AI strategically and in support of your ultimate mission and goals.

Darian and Cheryl’s Top 10 List: Critical Guidelines for AI Adoption

To help you succeed, *we’ve distilled the essentials of effective AI use into 10 actionable principles:*

- **Play around:** Experiment with AI across various tasks to uncover its potential, even for tasks where its value isn’t immediately clear. Try it on for size and practice a beginner’s mindset!

- **Ask for options:** Have AI generate multiple versions of outputs, refreshing as needed to explore a wide range of creative possibilities.
- **Start with teasers:** Begin with short summaries or outlines to ensure AI is aligned with your vision before diving into longer-form outputs.
- **Iterate for excellence:** Use follow-up prompts to refine AI's initial outputs, taking them from good to great before finalizing manually.
- **Be a hero, not a zero:** Guide AI by providing examples of desired outcomes to set clear expectations and achieve better results, also known as “multi-shot prompts.”
- **Prompt properly:** To generate the most helpful AI outputs, structure prompts to include your AI tool's role, desired outcome, goal, and format, plus examples for context.
- **Create a culture of experimentation:** Encourage staff to try out AI tools, share successes, and collaborate on challenges through forums, contests, and shared learnings.
- **Produce a policy:** Develop a clear AI policy outlining acceptable use, approved platforms and those to avoid, and alignment with organizational goals and values.
- **Dial in your data:** Keep your data accurate and secure, avoiding public tools for sensitive information and considering private LLMs when appropriate.
- **Human in the loop (HITL):** Always maintain human oversight to verify AI outputs, ensuring quality, accuracy, and appropriateness before taking action or sharing externally.

By following these guidelines and the advice offered in this section, you'll be equipped to embrace AI not as a replacement for human ingenuity but as a tool to amplify your efforts, ensuring your nonprofit thrives in the age of AI.

