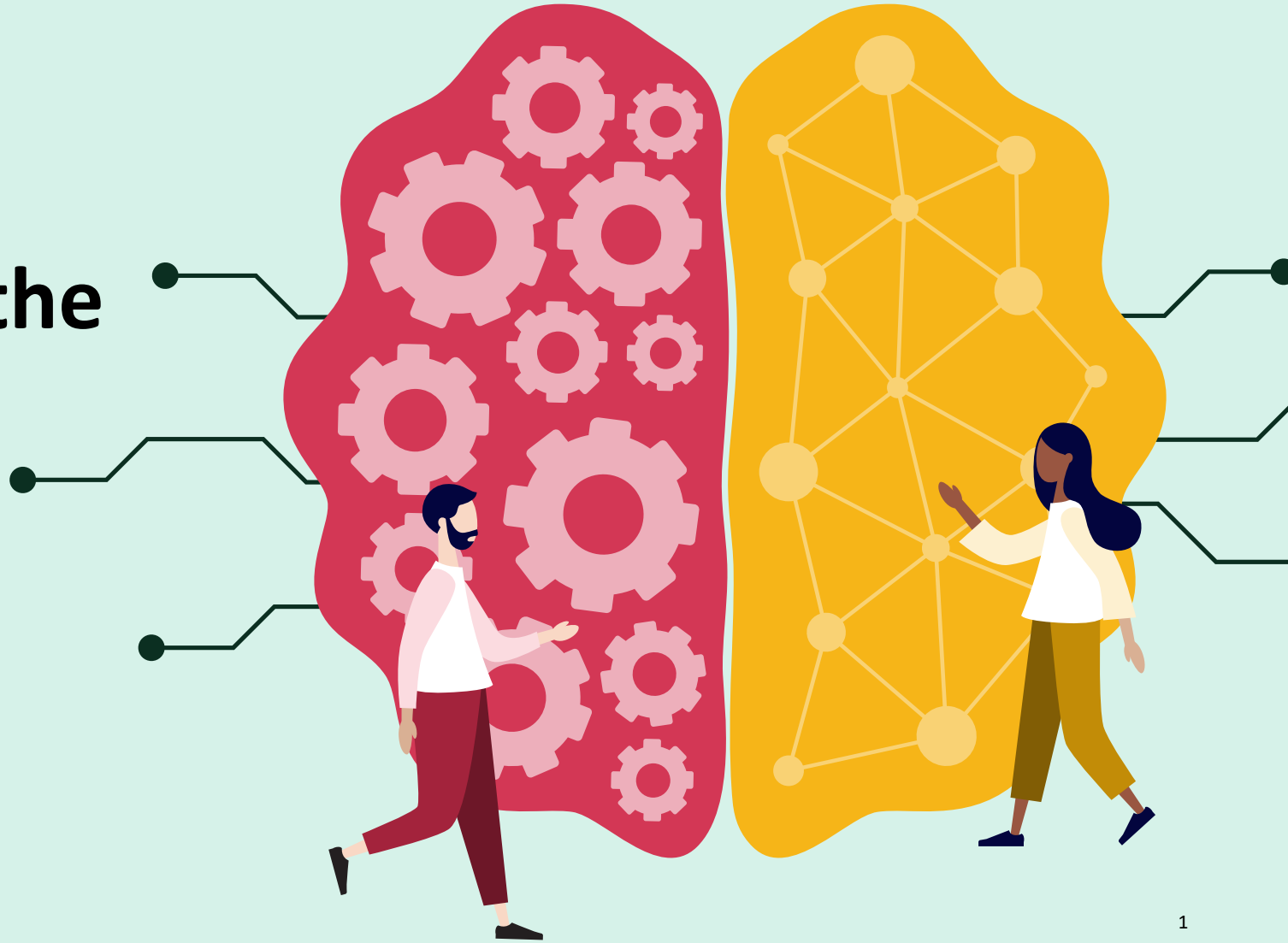
Mission delivery enabled by gen AI: A guide for teams in the not-for-profit sector

Team member version

2026



True as of December 2025

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Each version of this guide serves a different purpose

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This guide is the Team member version

1 Leadership version

Leading not-for-profit organisations (NFPs) through a period of change and disruption to implement generative AI (gen AI) safely and effectively

Key focus areas

- Deepening understanding of important AI concepts to enable better AI leadership and decision-making
- Fostering an environment that promotes learning, experimentation and collaboration
- Creating and communicating risk and governance guidelines

2 Team member version

Implementing end-to-end gen AI pilots in NFPs

Key focus areas

- Selecting and planning a workflow for early AI-enabled transformations
- Training and encouraging staff to use the new workflow
- Building skills and AI knowledge to allow the safe use of gen AI

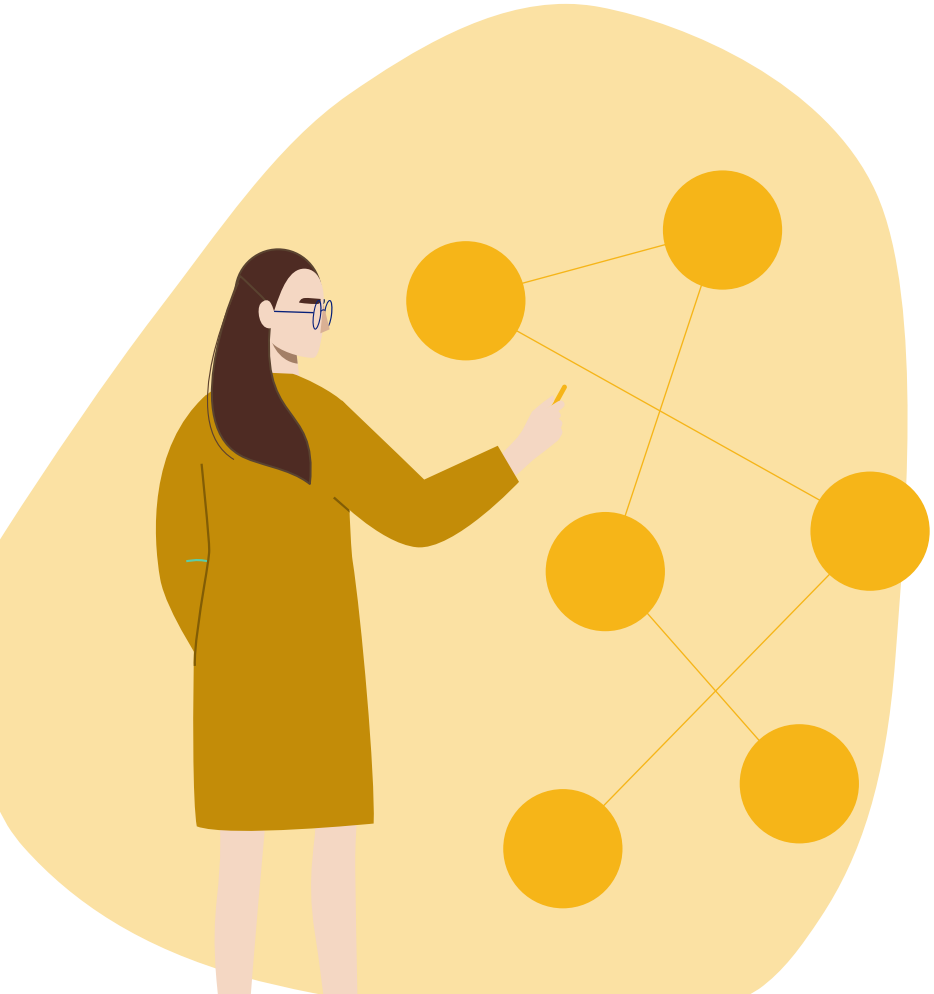
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1. Introduction and orientation



1A Executive summary

1B Acknowledgement of gen AI impacts

1C What this guide is and is not

1D Gen AI basics

1E Vision and framework

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Helping Australian NFPs use gen AI



Transforming challenges into opportunities

With over 60,000 charities, the Australian not-for-profit (NFP) sector plays a vital role in supporting communities. But many of these organisations struggle with limited resources and a heavy administrative burden. Generative AI (gen AI) can help ease these pressures, **giving organisations more time for the work that really counts**



A toolkit to empower change

This is a simple how-to guide to give team members the tools and insights they need to use gen AI effectively and responsibly in their NFP. **It is an end-to-end guide** to help organisations launch their first gen AI pilot to improve productivity, strengthen services, and increase impact

Acknowledgement of gen AI impacts



Gen AI presents a range of societal challenges, including output bias, misinformation risks and **workforce disruption** — issues that demand proactive solutions to ensure **responsible implementation**

Gen AI also requires significant computer power, intensifying **energy consumption**, carbon emissions and the mining of rare minerals, while putting pressure on water and hardware infrastructure



The NFP sector's resource limitations demand **strategic solutions**

Adopting **gen AI thoughtfully** can **unlock capacity** and redirect staff to **mission-critical initiatives**

Achieving success requires gen AI to be deployed with **structured safeguards** to **amplify outcomes** while mitigating risks

What this guide is and is not

This guide gives NFP team members a clear starting point for using gen AI in one specific area, **but it will not provide all the answers** for a successful implementation

Organisations can treat this guide as a road map that illustrates how to get from an idea to a first, simple, gen AI pilot

Most importantly, organisations should always be in control of gen AI; it is a tool to support organisational goals, and doesn't replace human judgement and emotional intelligence

What this guide is:

An outline of the essential concepts and steps involved in a gen AI pilot

A step-by-step framework to follow at your own pace

A resource to revisit at any stage of an AI adoption journey

What this guide is not:

It is not a universal solution for your organisation

It will not make decisions for you or replace your team's judgement

It does not eliminate the need for creative thinking, problem-solving, and experimentation

Maximising the guide's value:

Read once for an overview, then revisit sections as needed

Customise templates to align with your organisation's language, processes, and culture

Experiment with initial small pilots, learn from outcomes and adjust accordingly

Engage your team to implement the guide. Gen AI adoption thrives when individuals feel involved and empowered

Success with gen AI depends on how organisations adapt these ideas to their mission, needs, and resources

Gen AI is a powerful tool within the AI ecosystem

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Artificial Intelligence (AI) is the science and engineering of machines that can support decision-making, recognise patterns, and process language

	Machine learning	Deep learning	Generative AI (gen AI)	Agentic AI
What it is	AI that utilises patterns in data to improve over time	Uses a network of "digital brain cells" to handle very complex data	Creates new content (like text, images or videos)	Operates independently to complete tasks and achieve objectives through interaction with its environment
How it works	Spots patterns or makes **predictions** from data	Uses layered networks (like a simple brain) to understand or **categorise** data	Produces **new content** that looks or sounds like what it learned	Processes tasks into manageable, smaller steps, can perform **actions**
Examples in NFPs	Predicting trends in climate change	Analysing thousands of images to detect areas in need after a disaster	Writing a draft grant proposal	AI agent designed to monitor grant deadlines, generate application drafts and alert staff as required

Effective adoption of any AI tool relies on strict governance, human oversight, ethical frameworks, clear approval mechanisms and defined escalation pathways to promote safe use

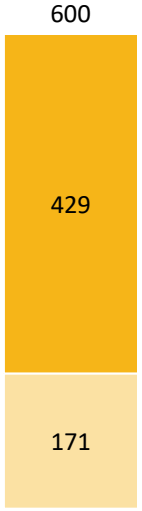
The potential use cases for gen AI to help NFPs in their mission are rapidly expanding

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Included in the library created in 2018 | Additions since 2018

The number of AI-enabled use cases identified per UN Sustainable Development Goal (SDG)[1] expanded rapidly between 2018 and 2023, and continues to grow

82%
of all use cases have at least one deployment (492 out of 600)



				Number of use cases with at least one deployment in 2023
SDG 3: Good Health and Well-Being	43	122	165	128
SDG 16: Peace, Justice, and Strong Institutions	28	27	55	40
SDG 15: Life on Land	10	30	40	38
SDG 4: Quality Education	13	27	40	37
SDG 13: Climate Action	7	25	32	31
SDG 2: Zero Hunger	8	24	32	29
SDG 11: Sustainable Cities and Communities	11	20	31	26
SDG 9: Industry, Innovation, and Infrastructure	9	21	30	21
SDG 8: Decent Work and Economic Growth	7	20	27	17
SDG 14: Life Below Water	1	25	26	24
SDG 12: Responsible Consumption and Production	3	18	21	19
SDG 7: Affordable and Clean Energy	2	19	21	18
SDG 10: Reduced Inequalities	6	13	19	15
SDG 6: Clean Water and Sanitation	2	16	18	16
SDG 1: No Poverty	10	7	17	12
SDG 17: Partnerships for the Goals	8	8	16	13
SDG 5: Gender Equality	3	7	10	8

Source: McKinsey, AI for social good: Improving lives and protecting the planet, 2024; AI for Sustainable Development Goals academy; Candid database 2018–23; IRCAI global top 100 2022 report, International Research Centre on Artificial Intelligence (IRACAI), 2022; United Nations activities on artificial intelligence (AI) 2021, International Telecommunication Union, 2021; United Nations Statistics Division; United Nations University Institute for Water, Environment and Health reports

Learning gen AI safely can support your NFP's mission

Gen AI and its uses are **rapidly expanding** year-to-year and will **affect every industry,** including non-profits

Gen AI has the potential to support NFP missions through over **600 AI-enabled use cases**

Learning to use gen AI **safely** is fundamental to managing its inherent **risks and societal implications**

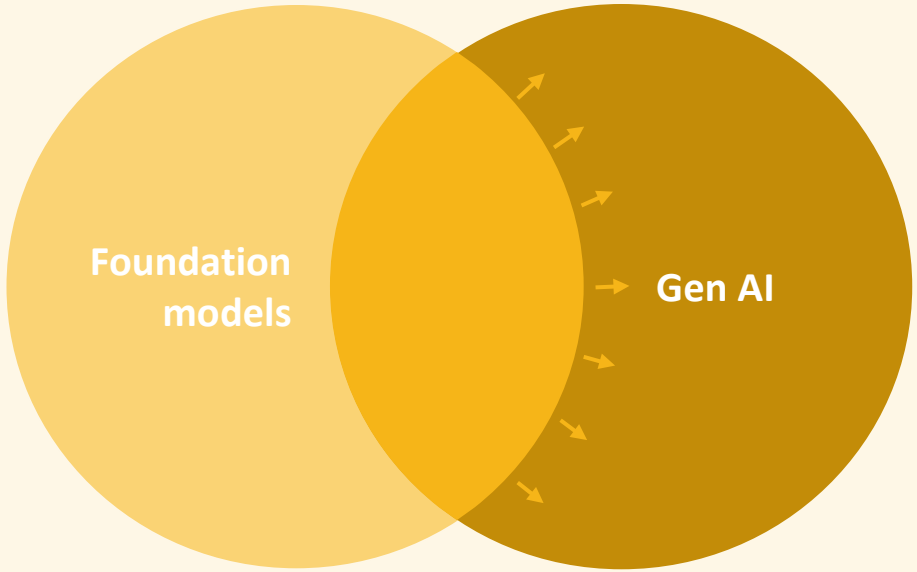
Foundation models are the engine behind gen AI

NONEXHAUSTIVE

Gen AI creates new content like text, images or summaries by drawing on powerful "foundation models" trained on huge amounts of data

At their core, foundation models work to predict the next item in a sequence

Foundation models work by learning patterns and relationships from the broad training data they ingest, which, for example, enables them to predict the next word in a sentence or the next pixel in an image



Foundation models
Extensive AI systems built on vast datasets, designed for adaptability across diverse tasks

Gen AI
AI that leverages these foundation models to generate new content such as text, images or audio, instead of solely analysing existing data

Source: McKinsey, *What every CEO should know about generative AI*, 2023.

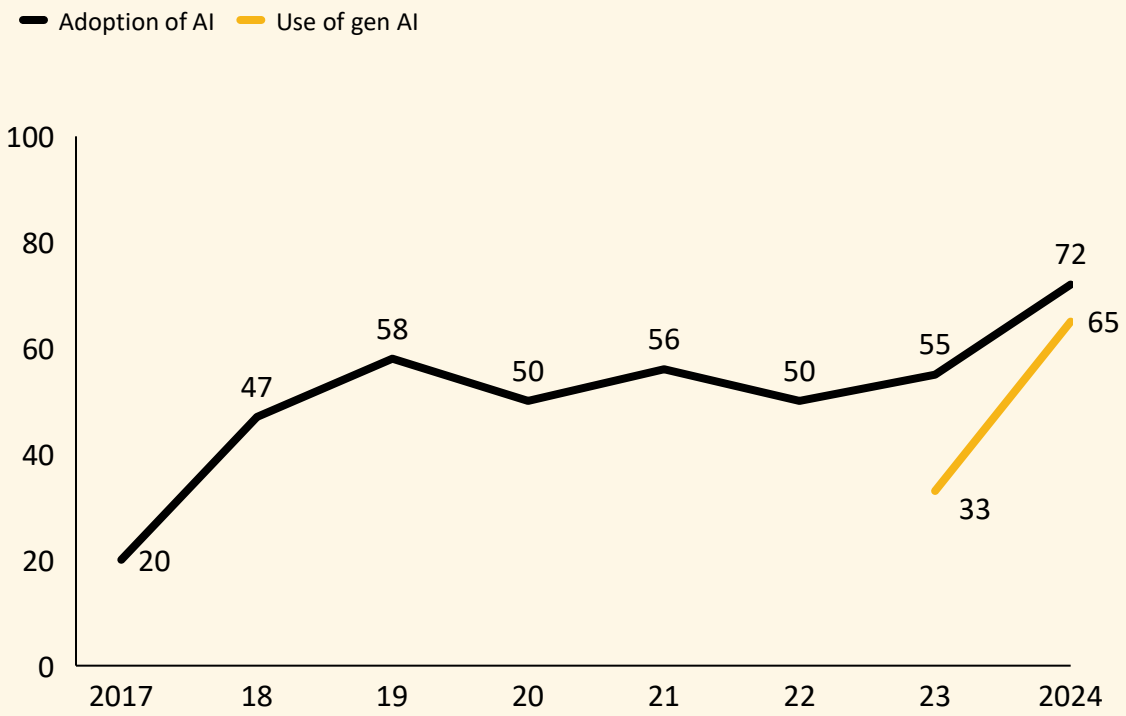
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AI adoption is accelerating and gen AI is leading the way

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Global AI adoption has increased dramatically over the past year …

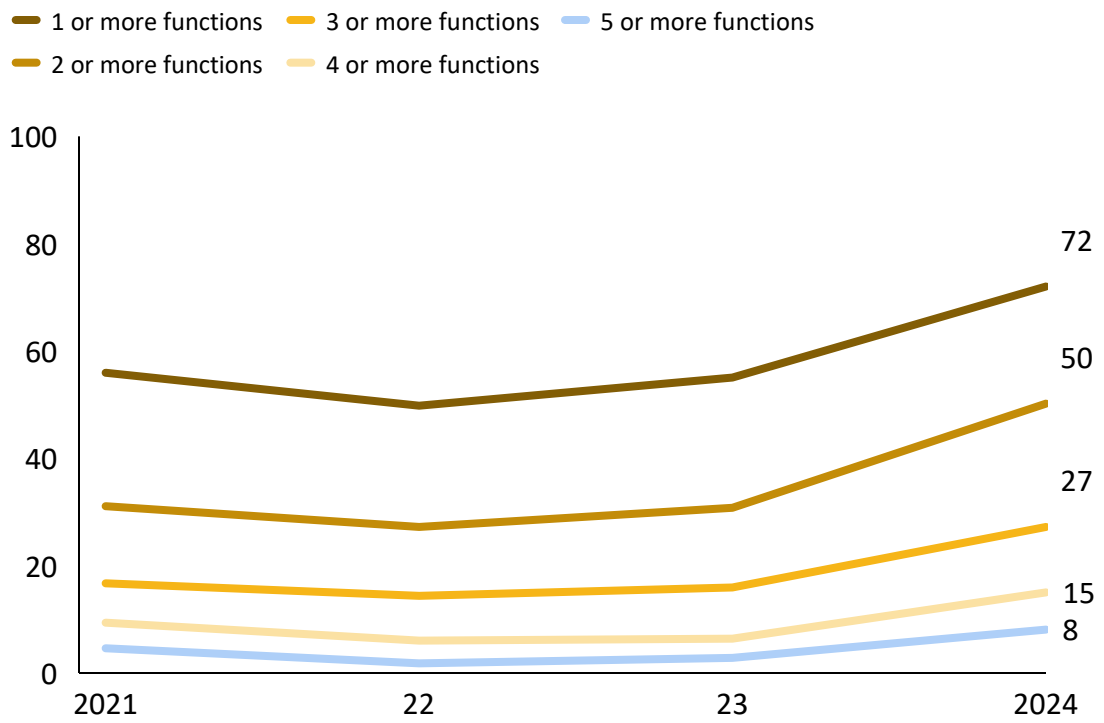
% of survey respondents



Source: McKinsey 2024, The state of AI in early 2024: gen AI adoption spikes and starts to generate value'.
Values are % of respondents

… and AI is being used across more areas of organisations

% of survey respondents



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Gen AI can be a value-add to creative, content-based and language-driven tasks

Focus in this how-to-guide



	Suited to AI	Suited to gen AI	Better suited to specialist tools
Problem	AI is particularly effective for **repetitive, predictable tasks** that involve structured data or clear decision rules	Gen AI excels in **creative, content-based and language-driven tasks**	Specialist tools are **purpose-built for a narrow, high-precision function** that requires domain expertise, strict accuracy or compliance with regulations. These tools often incorporate gen AI, but their design focuses on a specific use case rather than being general-purpose
Examples	Matching volunteers to upcoming events based on availability Predicting seasonal donation trends from past data Routing supporter enquiries to the correct team	Drafting donor letters, grant proposals or campaign messages Creating social media posts, images and videos Generating training materials	Grammer and tone checking Spell-check and auto-formatting Recording and storing calls

The use of gen AI is not limited to time savings: it can also improve quality

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Class of gen AI	Time savings	Quality improvement
 **Insight gen AI** Makes sense of messy data	Use gen AI to streamline analysis *Eg, Summarise open-text survey responses and extract the main themes*	Use gen AI to generate ideas or make predictions *Eg, feed in impact data and prompt gen AI to find trends that you haven't considered*
 **Content gen AI** Creates new text, images or audio	Use gen AI to delegate tasks *Eg, Draft donor emails, funding applications or impact summaries*	Use gen AI to review and improve work *Eg, use gen AI as an extra reviewer for your donor newsletter, picking up mistakes or inconsistencies that you've missed*
 **Interaction gen AI** Power conversations	Use gen AI to support interactions *Eg, Act as an onboarding assistant to help new staff or volunteers learn*	Use gen AI as a thought partner *Eg, help staff prepare for sensitive conversations such as funding declines*



The time saved by using gen AI can free up staff for more impactful activities such as directly interacting with donors or tailoring communications for different audiences

There are several examples of how gen AI is being used in NFPs

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Comprehension

Summarise long or messy text (like meeting notes or reports)

Help find key points or answers in documents

Suggest useful sources

Example

Help review grant applications faster



Content creation

Write and edit emails, contracts, or reports

Create marketing or fundraising materials

Generate images or charts

Example

Draft donor emails or fundraising letters



Coding

Write or fix code automatically

Help update old IT systems or build simple tools

Data synthesis

Example

Automate beneficiary feedback survey



Community engagement

Power chatbots to answer common questions

Help teams respond faster and collect feedback

Example

Give helpline staff quick answers about grants

Gen AI works best when it is used correctly through effective prompting

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1

Provide clear context to promote tailored and relevant answers (Eg, "I'm a nonprofit leader focused on increasing employment opportunities for disadvantaged youth")

2

Be clear and concise when specifying your needs: Eg, "I am **creating a funding proposal presentation** and need a **5-page deck** on x, y, z. Please outline the **high-level structure"**

3

Ask repeatedly and **provide detailed feedback** to refine responses – **engage in a conversation**

4

Ask for sources: When researching numbers (Eg, percentages), request the best sources to **verify** the data

5

Ask for questions: When using gen AI, ask it to ask you questions to help you provide sufficient context

Remember: Tone should be requested in a follow-up prompt, rather than in the original prompt!

Source: Centaurs and Cyborgs on the Jagged Frontier

Refining your prompts can help you to get even better answers

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Good Better



Examples

Providing examples is a great way to give the gen AI tool more clarity on the type of response or information you seek

Define the Australian nonprofit early-childhood sector in in 2-3 sentences. Give its overall size (revenue, employees, volunteers) and how that is split across the 5 biggest players in a table

Define the Australian nonprofit early-childhood sector in in 2-3 sentences, **in a similar format to this definition of the Australian charity sector:** "The Australian charity sector has an annual revenue of $190 billion dollars, 1.42million employees and ~3.2 million volunteers. The top 5 organisations, in terms of revenue, include The University of Sydney, University of Melbourne Group, Catholic Education Commission of Victoria Limited, Monash University and St Vincent's Health Australia Ltd)"



Personas

Assigning the gen AI tool a role or character helps tailor its responses to fit a specific perspective or expertise

Define the Australian nonprofit early-childhood sector in in 2-3 sentences. Give its overall size (revenue, employees, volunteers) and how that is split across the 5 biggest players in a table

Act as the Head of Strategy for [NFP] . Define the Australian nonprofit early-childhood sector in in 2-3 sentences. Give its overall size (revenue, employees, volunteers) and how that is split across the 5 biggest players in a table



Tone

You can adjust the gen AI tool's tone to change the style and manner of its response

Define the Australian nonprofit early-childhood sector in in 2-3 sentences. Give its overall size (revenue, employees, volunteers) and how that is split across the 5 biggest players in a table

Define the Australian nonprofit early-childhood sector in in 2-3 sentences. Give its overall size (revenue, employees, volunteers) and how that is split across the 5 biggest players in a table

Then describe the growth opportunity for Bright Beginnings Early Learning Group in 3 bullet points. **Be optimistic and excited!**

Meta-prompting: Ask the AI to improve or clarify your prompt before answering – for example: *"Suggest how I could refine this prompt to get a clearer response"*

Gen AI still has limitations that need to be considered before you start your AI journey

NONEXHAUSTIVE

Ethics and risk considerations



Output quality

It can be confidently wrong and provide misinformation from made up or non-reliable sources



IP infringement

It could break copyright or trademark by reusing protected content



Data privacy and quality

It can share private data or rely on bad information



Malicious use

It can be misused to spread misinformation or create harmful content



Security threats

It can be misused in cyberattacks, fake emails, or impersonations



Impaired fairness

It may give answers that offend, exclude, misrepresent people or display bias to the user



Misaligned strategy

It can give answers that do not align with your organisation's mission and values



Human judgement and oversight are essential to protect your NFP when using gen AI

Best practices to minimise gen AI risks

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Deep dive to follow



Governance and effective leadership

Establishing the right governance mechanisms around policies, data access guardrails, risk tolerances, decision committees, e tc



Guardrails including human in the loop

At least for the near term, ensure a trained and accountable human colleague makes all decisions - using gen AI only for enablement



Pilot before scaling to employees

Pilot and rigorously test use cases before implementing at scale



Performance validations

SMEs[1] could check the model outputs for accuracy and any degradation – both during and post deployment



Data management, including ethical and bias concerns

Data sets could be independently tested for bias and labelled as being healthy or not for use



Clear communication of guardrails

Communicating a clear set of guardrails – do's and don'ts – to employees

1. An SME is a subject matter expert

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Deep dive: Techniques to check AI outputs for factuality



Ask the AI to show its sources



Run a cross-check using a second tool



Use a short human checklist before sharing

Why	Errors often happen when the model makes claims without backing them up	Different gen AI tools may give slightly different answers. If they agree, your confidence increases.	Human review catches tone, factual errors, and bias that machines miss.
How to do it:	After you get an answer, type: “List the sources you used for this answer. For each source, include a short quote and the link.” Then open the links and check that the facts actually appear in those pages	Copy the same question into another model (for example, ChatGPT or Google Gemini). Compare both answers and note differences. If they conflict, search that point yourself on a trusted website or in your organisation’s files before using it	Before sending or publishing, ask: “Does this sound right for our audience? Are all facts correct? Does it include sensitive or private data?” Make one person on your team responsible for doing this quick check for every gen AI-assisted document

Source: Expert interviews

Situations where hallucination risks are higher

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Hallucination:

A response generated by gen AI that contains false or misleading information presented as fact



Ambiguous, vague or unfamiliar prompts

If the prompt is unclear, open-ended or not directly answerable from the training data, the gen AI is forced to "guess" at what the user wants



Exact numbers and arithmetic

Models often slip on long calculations, larger number ranges, unit math and bookkeeping-like problems



Very long inputs

When relevant facts are buried in the middle of a long prompt or multi-doc context, models miss them – the "lost in the middle" effect



Citations on demand

When asked to provide sources, models may fabricate references or conflate similar titles/authors



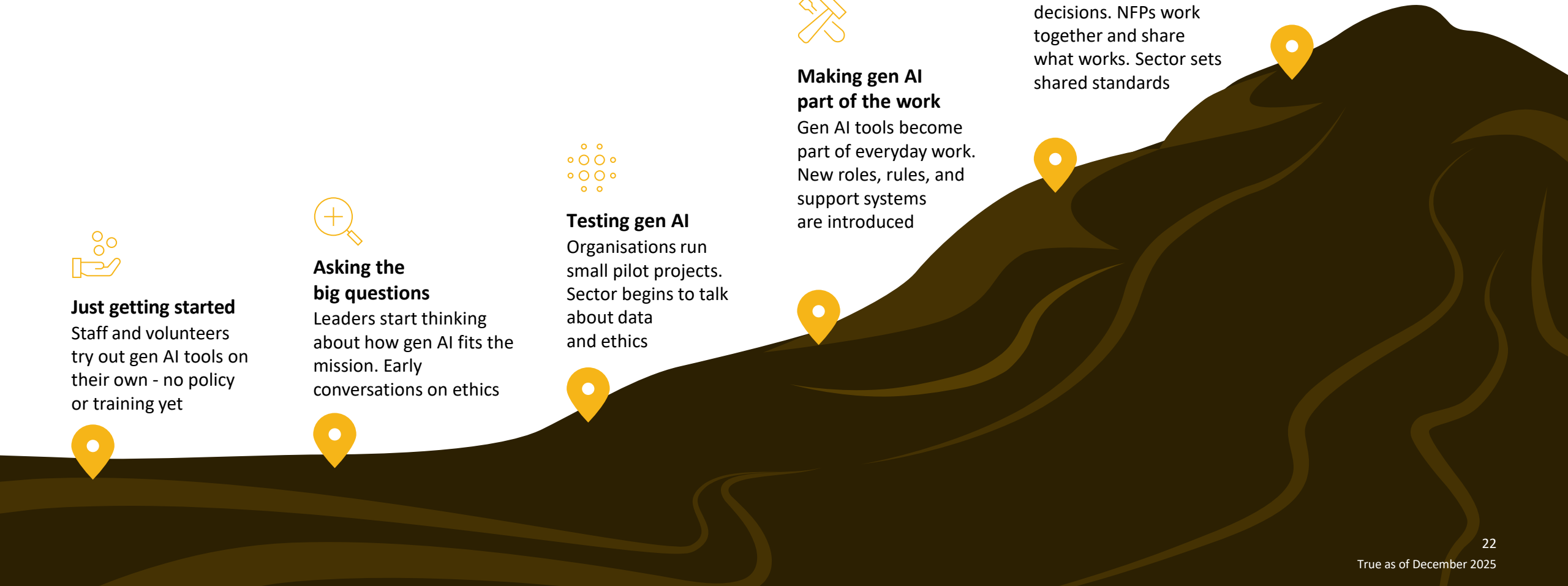
Niche topics

When the gen AI encounters topics or facts that were rare, missing or inaccurately represented during training, it may fill gaps with plausible-sounding but incorrect information

Source: DataCamp, AI Hallucination, 2025. Shao, Beyond Misinformaton: A Conceptual Framework for Studying AI Hallucinations in (Science) Communication, 2025. Ji, Survey of Hallucination in Natural Language Generation, 2024. Agrawal, Do Language Models Know When They're Hallucinating References, 2024.

How NFPs can make gen AI part of delivering their mission

How can this shift be made safely and fairly?



Just getting started
Staff and volunteers try out gen AI tools on their own - no policy or training yet

Asking the big questions
Leaders start thinking about how gen AI fits the mission. Early conversations on ethics

Testing gen AI
Organisations run small pilot projects. Sector begins to talk about data and ethics

Making gen AI part of the work
Gen AI tools become part of everyday work. New roles, rules, and support systems are introduced

Using gen AI to drive change
Gen AI helps guide decisions. NFPs work together and share what works. Sector sets shared standards

Gen AI done well and widely
Gen AI is embedded across the sector. It's safe, inclusive, and focused on community impact

Rewired Framework for digital and AI transformation

Strategic alignment

1. Road map
Align on how to pilot a new gen AI workflow in a way that is efficient, safe and ethical

Delivery capabilities

2. Talent
Upskill staff to use gen AI

3. Operating model
Create a working environment where teams can regularly test new approaches

4. Technology
Update existing technology to enable gen AI

5. Data
Collect and structure data for gen AI to use

Change management

6. Adoption and scaling
Support the new gen AI solution through clear communications, role modelling, training and accountable leadership

What is it?

The Rewired Framework is a comprehensive approach designed to drive transformation in organisations by integrating digital and gen AI capabilities. It is built on lessons from hundreds of digital transformation programs

What is the benefit of using it?

It provides a structured approach to navigating the complexities of modern business environments while driving sustainable growth

How to use it?

Aim to follow all six steps of the framework. It has been adapted here to be more specific to AI transformations in small NFPs

Source: McKinsey, *What is a digital transformation?* 2024.

Framework to help NFPs on safe gen AI adoption

Following the **Rewired Framework**, the rest of this how-to guide uses a six-part structure to approach adoption of gen AI by NFPs

Strategic alignment

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Align on how to pilot a new gen AI workflow in a way that is efficient, safe and ethical

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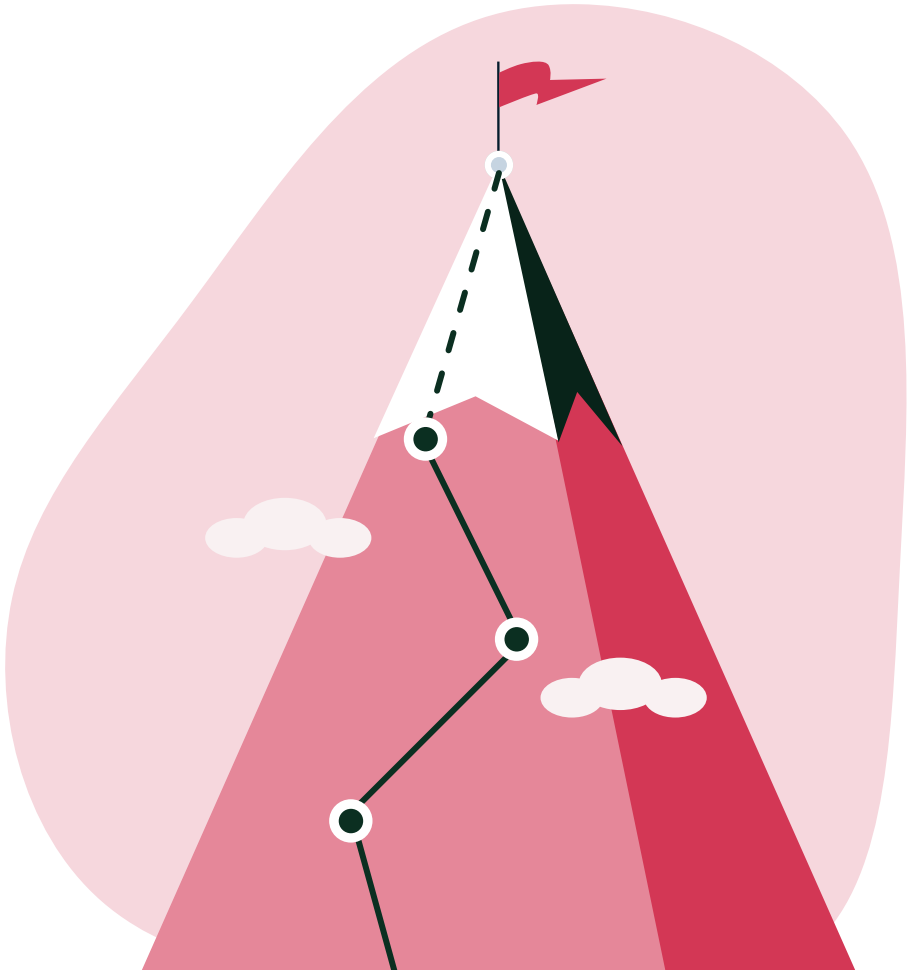
6. Adoption and scaling
Support the new gen AI solution through clear communications, role modelling, training and accountable leadership

Source: McKinsey, *What is a digital transformation?* 2024.

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2. Road map

Align on how gen AI can help the organisation better support the community



2A Overview

2B Draft a workplan

2C Choose your first domain

2D Reimagine this domain

2E Consider ethics and risks

2F Set clear measures of success

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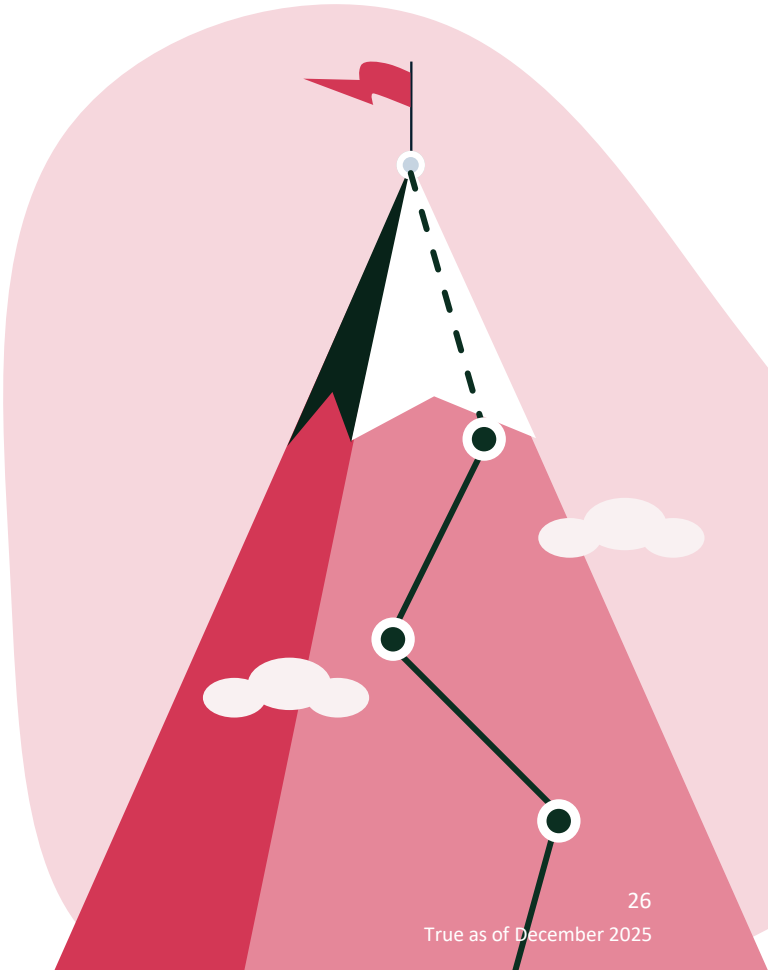
Road map checklist

Completing these tasks will help your team align on how gen AI can help you to support the community

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This section will teach you how to do each of the following:

- [ ] Draft a workplan for your gen AI pilot
- [ ] Identify domains of organisation
- [ ] Choose domain for pilot
- [ ] Map out current workflow
- [ ] Map out future, gen AI enhanced workflow
- [ ] Complete risk exercises
- [ ] Document and track measures of success



Framework to help NFPs on safe gen AI adoption

Strategic alignment

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Align on how to pilot a new gen AI workflow in a way that is efficient, safe and ethical

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Collect and structure data for gen AI to use

Change management

6. Adoption and scaling
Support the new gen AI solution through clear communications, role modelling, training and accountable leadership

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Overview of Road map

This road map is a step-by-step guide to help your organisation identify where gen AI can help, test it safely in one area, and prepare for structured adoption

Module and description

2B. Draft a workplan	Begin by planning out how long you think your NFP will need to plan and build a gen AI pilot, and what the steps will be to get there
2C. Choose your first domain	Pick one area of work that is high value but low risk. Start small to prove gen AI's impact with a safe, quick win
2D. Reimagine this domain	Map today's process, then redesign it with gen AI handling repetitive tasks and staff focusing on higher-value work
2E. Consider ethics and risks	Run a pre-mortem: imagine your project failed and ask "what went wrong?" Put in guardrails so adoption is safe and trusted
2F. Set clear measures of success	Decide how you'll track progress, Eg, time saved, improved quality, staff satisfaction or more time spent on mission work

Start with one high-value, low risk area, prove that it works, and build momentum from there

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Click to view template in appendix T

Design a workplan that fits your NFP

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	Example conservative workplan for a gen AI pilot	Q2	Q3	Q4
I Prep	Establish gen AI working team			
	Shortlist priority domains for gen AI solution			
	Align on priority domain for gen AI solution			
	Create current priority domain workflow			
	Understand current tech and data landscape			
	Develop evaluation metrics			
	Develop checklist of ethical and risk guardrails			
	Reimagine priority domain workflow with gen AI			
	Develop ethics and risk framework policies			
	Create high-level change management plan and people enablers			
II Pilot build	Design and test prompts for each new workflow step			
	Align on tech & data changes needed for new workflow			
	First draft design of MVP gen AI solution			
	Design and test visualisation of MVP gen AI solution			
	Create pre/post pilot gen AI solution reporting			
	Test and iterate draft design of an MVP gen AI solution			
	Develop gen AI training guides on new workflow			
	Finalise design of MVP gen AI solution			
III Live pilot	NFP conducts training on new gen AI solution			
	NFP goes live with pilot gen AI solution			
	Preliminary evaluation of gen AI solution			
IV Iteration	Set up bi-monthly check-ins			
	Improve on lessons learned			
	Begin extension into other workflows			

The speed and complexity of your pilot depends on your NFP's goals and culture

Many organisations will want to **start slow**, put guardrails in place and learn as they go

Example: *One 30 FTE NFP was conscious of the risks of AI, choosing to begin with a* ***prompt library***[1] *tailored to their donor newsletter drafting workflow*

Other organisations may prefer to **iterate quickly**, implementing ambitious solutions

Example: *One 15 FTE NFP had gen AI champions eager to bring the latest tools to their organisation, choosing to begin with a basic* ***agent***[2] *for their impact reporting workflow*

A workplan acts as an alignment tool to help your team decide on a path forward, and allows you to work backwards from the outcome

As you work through this guide, revisit the workplan and think about whether it makes sense for your NFP. The workplan can also be modified during the pilot planning and implementation

1. A prompt library is a curated and governed set of reusable prompt templates, including best-practice instructions, examples and guardrails, designed for repeatable tasks
2. An agent is a gen AI system that can plan and execute multi-step tasks, taking limited actions on behalf of a user within defined guardrails

Collaborate as a team to work out where gen AI can help

ILLUSTRATIVE **NONEXHAUSTIVE**

To identify where gen AI could create the most value for your organisation, begin by understanding your **current workflows**, **key challenges**, and areas that could be **enhanced through gen AI**. Conducting this assessment **as a team** provides a more complete and diverse perspective on how your organisation operates and where opportunities for improvement exist

Examples of how to collaborate as a team for the following sections



Virtual white-board session

Facilitate a live brainstorming session using Miro, Mural, or FigJam. Use digital sticky notes and templates



In-person whiteboarding

Use a physical whiteboard or flipchart to map workflows. Encourage sketching, clustering, and rapid iteration



Structured brainstorming

Run short, focused idea bursts (Eg, “3-minute rounds”) where each participant shares one idea



Team reflection and prioritisation

Review the brainstorm output as a team. Apply “traffic light” voting (green/yellow/red) to prioritise ideas

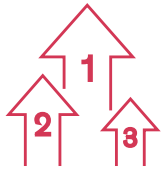
Start small, start smart by picking one area to pilot gen AI where you can show a quick win



Selecting the **right initial domain** is critical to generating **organisational enthusiasm** for gen AI



Focus on a **high-value, low-risk domain** to deliver **quick, visible ROI** and build staff confidence



A **well-executed pilot** establishes trust, accelerates progress, and provides a **strong foundation** for broader adoption and scaling of gen AI

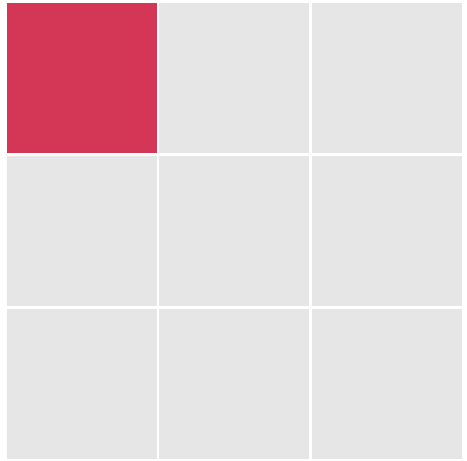
True as of December 2025

It is important to define what constitutes a “domain” or an area to improve with gen AI



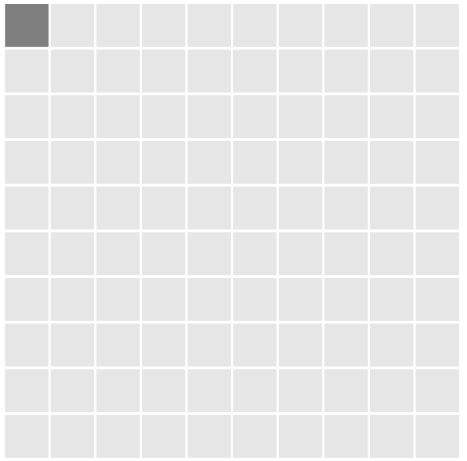
Entire enterprise – too big

Too many domains, data sets and stakeholders to be able to get to meaningful impact quickly



Transforming a domain – just right

Balance of end-to-end impact, leadership excitement and achievable results

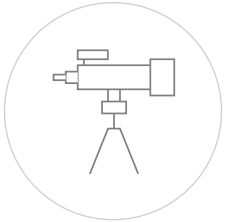


Use case – too small

Too niche to demonstrate material impact on an end-to-end domain

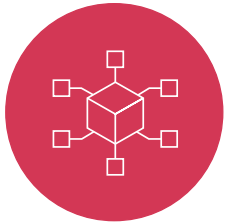
Source: McKinsey, *Choose the right transformation ‘bite size’,* 2024.

There are multiple options to define a “domain”



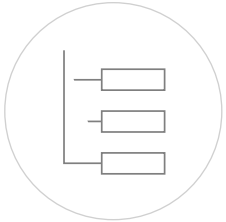
Function

Traditional groups, such as sales, finance, marketing or supply chain



Workflow/process

High-value processes like program delivery, fundraising, or reporting



Journeys

Interaction-intensive processes like onboarding, providing advice or buying a product online

For a first gen AI pilot, it is recommended to start with a **single workflow**. It’s focused enough to measure impact, contained enough to manage risks, and representative enough to show potential for wider adoption

Source: McKinsey, *Choose the right transformation ‘bite size’,* 2024.

Start by identifying the domains of your organisation

ILLUSTRATIVE **NONEXHAUSTIVE**

Potential domains

Domains that are likely suitable for gen AI pilots

Program & service delivery

Program delivery

- Digital (self-service)
- Digital (webinar)
- Face-to-face
- Integrated servicing and partners

Policy & Advocacy

- Forecasting and projections
- Research
- Submissions
- Publication

Fundraising

- Donor targeting and relationship management
- Grantmaking
- Learning and reapplication
- Acquittal and closure
- Impact reporting

Corporate and enabling

HR

- Recruitment
- Performance mgmt.
- Learning & Development

Procurement and finance

- Procurement
- Finance
- Asset management

Technology and data

- Technology modernisation
- Technology support
- Cyber
- Data management
- Digital product

Marketing and communications

- Campaign design and launch
- Internal and external communications

Compliance

- Legal, licensing and tax
- Governance standards and policy
- Annual reporting (Eg, ACNC, AIS)
- Internal reporting (Eg, Board)

Cross-cutting gen AI domains

- Employee productivity (knowledge management, generative writing/summarisation)
- Data analytics and visualisation (Eg, report writing)
- Scheduling and administrative support

You will need to adjust this template to your organisation structure

This is an example of a workflow (ideal for a gen AI pilot)

This is an example of a function (more difficult for a gen AI pilot)

Think about which domains are worth shortlisting straight away

This step will ideally be carried out with the oversight of leaders who are familiar with multiple functions and workflows in the organisation

Source: McKinsey, *Choose the right transformation 'bite size'*, 2024.

Group the key domains of your organisation into priorities to form a shortlist

ILLUSTRATIVE **NONEXHAUSTIVE**

Example of short-listing domains for prioritisation, methodology to follow



These are examples. In this example, donor relationship management may be less feasible for this NFP. But in your NFP, you might have better data which makes it more feasible

Source: McKinsey, *Choose the right transformation 'bite size', 2024.*

Examples of how to approach prioritising a domain for your gen AI pilot

ILLUSTRATIVE **NONEXHAUSTIVE**

Consider how gen AI can deliver impact in each domain, and its feasibility

What gen AI can offer (impact)

Better service
Make it easier for community to get the help they need

More capacity
Do more with the same resources by improving how time and money are used

Less admin hassle
Cut down the steps and barriers that slow down work

Happier staff and volunteers
Simplify systems and tools to focus on what matters

Lower risk
Improve quality and control to reduce mistakes and protect your organisation

What needs to be in place (feasibility)

Leadership support
Leaders are willing to back the change and make it happen

Right technology
You have (or can access) the tech and tools needed to use AI

Useful data
Information you have is ready and good enough to use for AI

Simplicity & speed
You can make changes that deliver value quickly, using practical and easy-to-follow processes

Risk, legal, social license

Gen AI opportunities can be used safely and responsibly with the right checks in place

Source: McKinsey, *Choose the right transformation 'bite size', 2024.*

Three examples of prioritising individual domains



Impact reporting

High impact: Gen AI can help summarise your program results, highlight what's working, and turn data into clear, visual stories for funders or reports

High feasibility: Most NFPs already collect data on outcomes and use standard report formats, so gen AI can be easily added to the process



Donor relationship

High impact: Gen AI can help tailor messages to donors and volunteers, saving staff time and improving engagement

Low feasibility: To do this safely, you need clean, up-to-date donor data and privacy controls in place



Legal, licensing and tax

Low impact: These areas rely on detailed human review and judgment, where gen AI currently adds little value

Low feasibility: The work involves sensitive or regulated information that can't easily be shared or automated

True as of December 2025

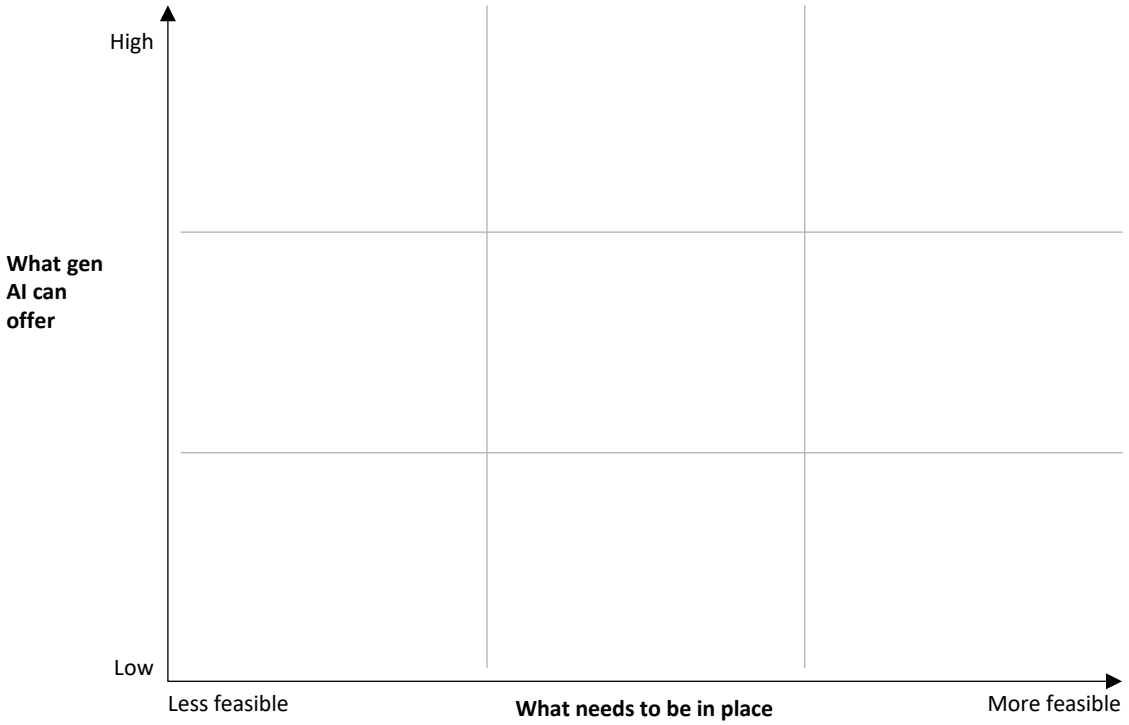
Click to view template in appendix T

How to prioritise which domains could benefit from being reimagined with gen AI as your first pilot

ILLUSTRATIVE **NONEXHAUSTIVE**

1

Place your NFP's domains on a grid of impact and feasibility (examples to follow)



2

Colour-code the best candidates from green (best), to orange, to red (worst)

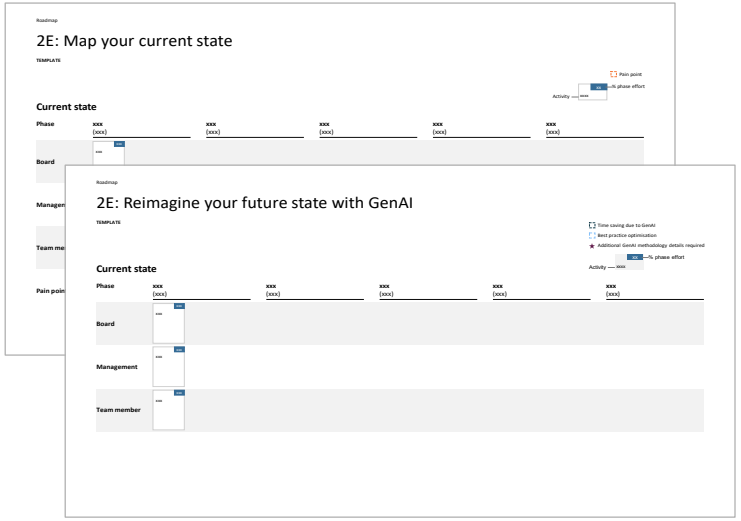
Digital (self-service)	Digital (webinar)	Face-to-face	Integrated servicing and partners
Forecasting and projections	Research	Submissions	Publication
Donor targeting and relationship management	Grantmaking	Impact reporting	Acquittal and closure	Learning and reapplication
Recruitment	Performance management	Learning and development	Procurement	Finance	Asset management
Technology modernisation	Technology support	Cyber	Data management	Digital product/ software productivity
Campaign design and launch	Internal and external communication	Legal, licensing and tax	Governance standards and policy	Annual reporting (Eg, ACNC, AIS)	Internal reporting (Eg, Board)
Employee productivity (knowledge management, generative writing/summarisation)	Data analytics and visualisation (Eg, report writing)	Scheduling and administrative support			

Which domains are best depends on how your organisation works

Once you have chosen your domain, reimagine how the work can get done with gen AI

Reimagining a domain means looking at your current workflow step by step, spotting where time and effort are wasted, and envisioning **how gen AI could streamline or transform those steps**

By mapping today's state against a future state, you can see both the pain points and the opportunities — **making change concrete, not abstract**



Why is it important to map?

- Makes hidden work visible
- Pinpoints areas where staff effort is inefficient
- Identifies opportunities for gen AI to drive impact
- Builds a compelling case for change by saving hours, reducing errors and enhancing quality

First questions to ask when mapping your current process

ILLUSTRATIVE **NONEXHAUSTIVE**



Steps and flow

What are the main steps from start to finish?

Who is involved at each step?

Time and effort

How long does each step usually take?

Where do staff spend the most time or effort?

Pain points

Which steps feel repetitive, manual, or frustrating?

Where do staff spend the most time or effort?

Data and tools

What information or data is needed at each step?

What tools or systems are currently used (spreadsheets, emails, etc)?

Opportunities

Which tasks feel “low-value”?

Which steps require lots of reading, writing or data crunching that gen AI could accelerate?

Click to view template in appendix T

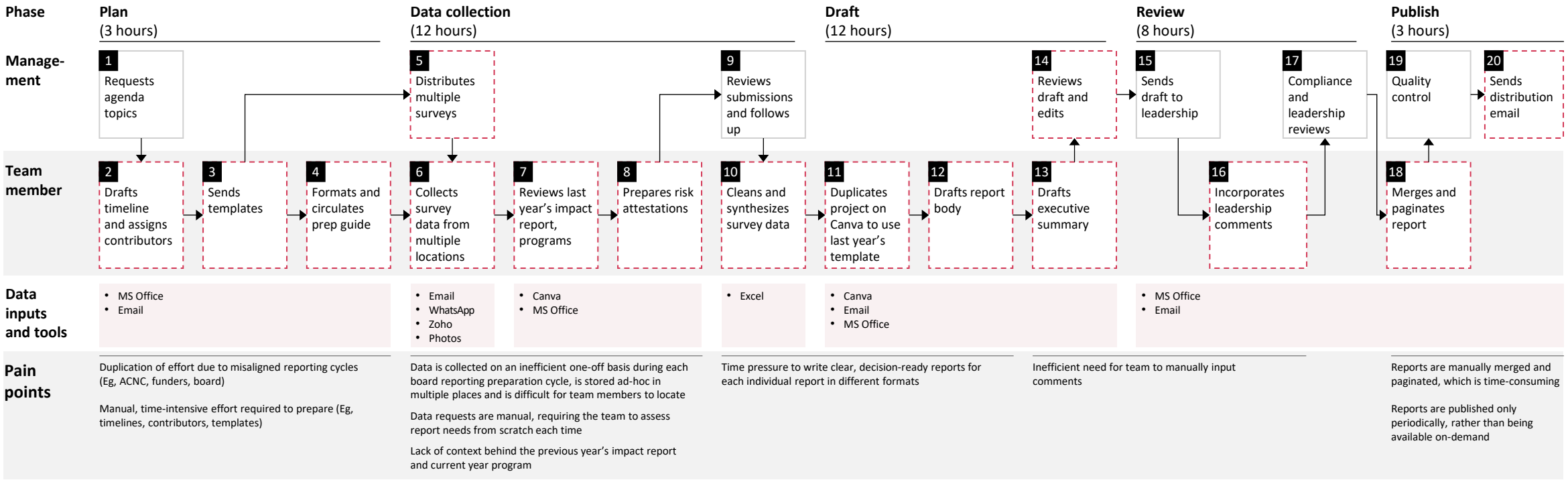
Example of the current state of impact reporting workflow – the process is highly manual for each phase

Pain point

Activity — xxxx

ILLUSTRATIVE **NONEXHAUSTIVE**

Example: current reporting process, 38 hours total[1]



It's important to think about what kind of technology platforms you're using while you're at this stage – it will help you later when you need to plan what new tools to bring

1. Hours given as hours per report prepared (which may vary based on the frequency of a particular not-for-profit)

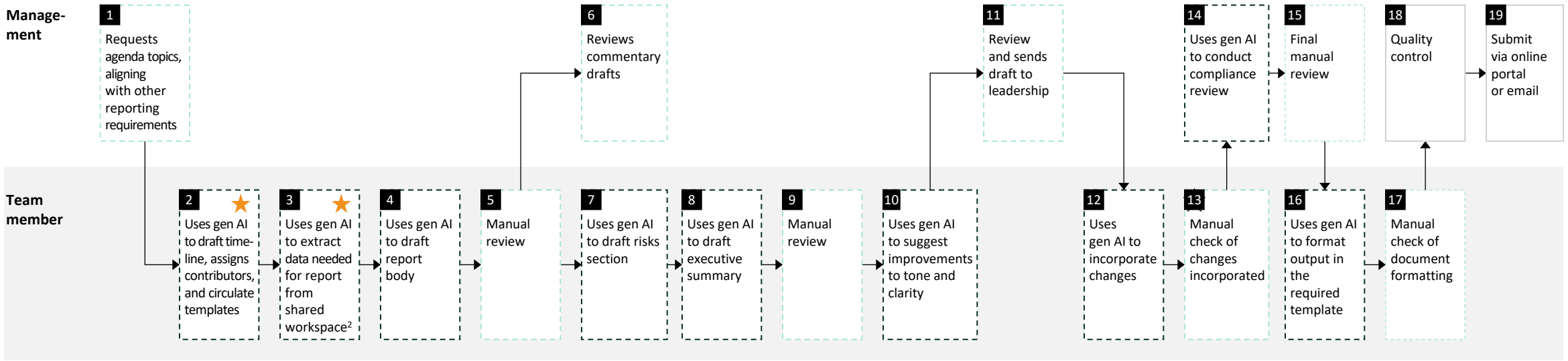
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Example of future-state impact reporting with gen AI shows impact reporting production time reduced by 22 hours (~60%)

Time saving due to gen AI
Best practice optimisation
★ Additional gen AI methodology details required

ILLUSTRATIVE **NONEXHAUSTIVE**

Example future-state reporting process, 16 hours total[1] (highly illustrative)



1. Hours given as hours per report prepared (which may vary based on the frequency of a particular not-for-profit) |
2. Depends on the tech/data enabler – requires folder of all required source documents and precedents available to upload to LLM

Plan ahead to spot and prevent gen AI risks early

ILLUSTRATIVE **NONEXHAUSTIVE**

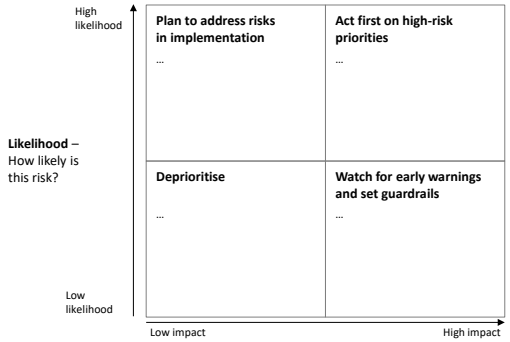
2F. Pre-mortem exercise

TEMPLATE

Step 1
What could stop us being successful?

1. ...
2. ...
3. ...
4. ...
5. ...
6. ...
7. ...
8. ...

Step 2
Use a risk matrix to map possible failures



What it is?

Before you begin, take time to imagine that your gen AI pilot has already failed; then ask *why*. This helps you spot weak points early.

What is the benefit of using it?

It helps catch potential ethics and risk considerations, establishes guardrails and mitigates unexpected challenges

How to use it?

1. Ask your team: “If this pilot fails in a year’s time, what is likely to have caused the failure?”
2. Write down every possible reason: some broad areas to think about include technical, ethical or operational
3. Discuss what safeguards or actions could prevent each example
4. Focus first on the issues that would have the biggest impact

Click to view template in appendix T

Risk-matrix exercise

ILLUSTRATIVE

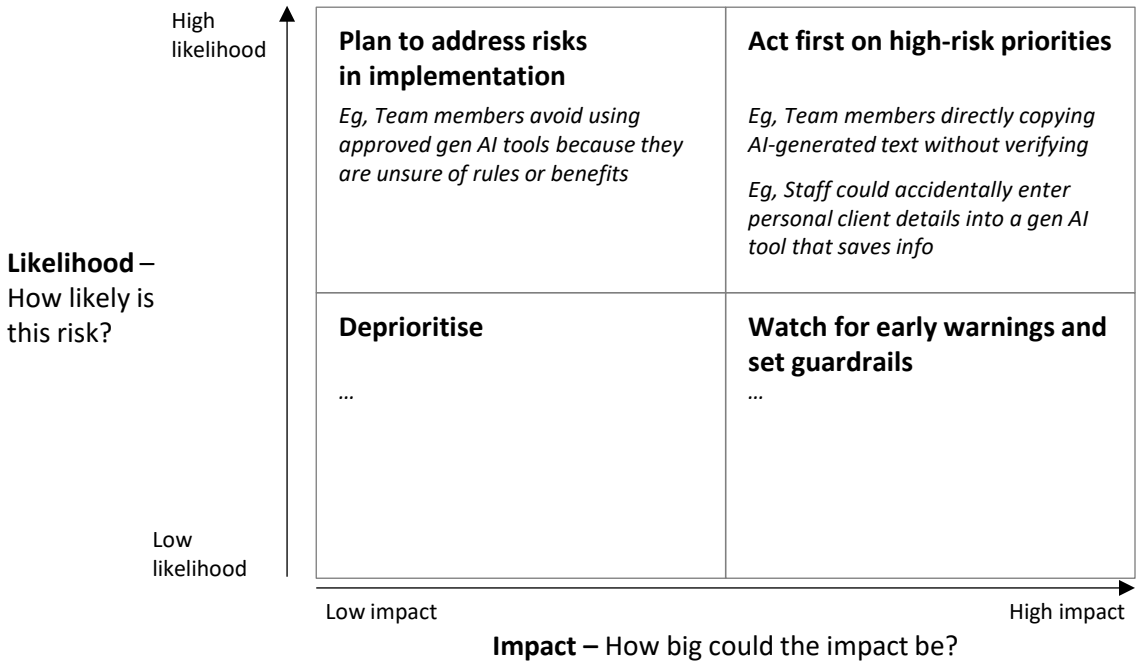
Step 1

What could stop us being successful?

1. *Eg, Team members may copy AI-generated text directly into reports or posts without checking facts or tone*
2. *Eg, Staff could accidentally enter personal client or donor details into a gen AI tool that saves or reuses this information*
3. *Eg, Some team members avoid using approved gen AI tools because they are unsure of the rules or benefits*
4. …
5. …
6. …
7. …
8. …

Step 2

Use a risk matrix to map possible failures



Your team needs to look ahead, ask what might go wrong during the pilot, then prioritise those risks and make plans for addressing them (Eg, through human oversight, training and rules)

Guardrails to help mitigate risks for your new gen AI workflow

ILLUSTRATIVE **NONEXHAUSTIVE**

Risk management core

Governance, policy and gen AI risk principles



Human in the loop:
Decide which steps need humans to review. Ideally steps that result in important decisions, or before any output leaves the organisation



Hallucination management:
Make sure gen AI answers are grounded in real facts (Eg, ask the gen AI to show its sources and verify content)



Escalation pathways:
Create ways for people to report problems with the workflow, or concerns about quality or ethics



Responsible gen AI policy:
Designing the workflow to follow the organisation's responsible AI policy (if available) may reduce the likelihood of unforeseen problems

Supported by

Talent

Delivery capabilities

Work with **teammates from different disciplines** (Eg, data, operations, design) to make sure a wide range of possible problems have been accounted for

Make sure the users of the workflow have the right **training** to use it safely

Operating model

Agree as a team **who is responsible** for reviewing gen AI outputs and signing off before it is seen externally

Encourage **open feedback** on what's working and what feels unsafe

Technology

Use only **trusted, secure platforms** for gen AI experiments (Eg, Microsoft Copilot, ChatGPT Enterprise)

Start small, test the workflow on limited cases before expanding

Data

Confirm you understand **what data the workflow uses** and where it is stored

Do not design workflows that involve pasting confidential, client or personal data into public gen AI tools

Adoption and scaling

Change management

Ensure staff adopt a **safety-first mindset** for the workflow (Eg, understanding that it is a tool and can't replace human judgement)

Capability building: not just training, but hand-to-hand coaching, including on risks and limitations

Role modelling: have trusted colleagues role model using the new workflow transparently and responsibly

Measurement system: track the quality and effectiveness of the tool so that any problems are picked up and fixed



Here are some examples of "guardrails" or ways to guard against risks. The core risk principles, such as "human in the loop", are supported by measures taken in every layer of the wider organisation

Click to view template in appendix T

Use your prioritised risks to design guardrails to address each risk

Example risk planning for impact reporting pilot workflow

ILLUSTRATIVE **NONEXHAUSTIVE**

Risk category	Risk	Mitigation
Act first on high-risk priorities	Team members copy gen AI-generated text directly into reports without checking accuracy or tone	Always fact-check and review tone before publishing. Assign a "human reviewer" for all external outputs
	Staff accidentally enter personal or donor data into a gen AI tool	Only use approved tools (Eg, ChatGPT Enterprise). Never input names, contact details, or confidential info
	Misuse of metrics or biased results in impact reporting	Include a manual review step to validate key findings, cross-check with source data
	Gen AI-generated insights are misunderstood by non-technical users	Add plain-language summaries and context notes before sharing
Plan to address risks in implementation	Some team members don't use the gen AI workflow because they're unsure of rules or benefits	Run a short "safe use" demo session and share a quickstart guide
	Gen AI tools produce inconsistent results	Test prompts and document best examples, agree on a standard prompt library
	Lack of clarity on who reviews gen AI outputs	Define a sign-off process: one person reviews each deliverable before sharing externally
	Staff unsure about which data sources are approved	Keep a shared list of verified data sources and where data is stored
Watch for early warnings	People skip review steps under time pressure	Add quick reminders or checklists in the workflow (Eg, "Did you verify gen AI output?")
	New data sources added without validation	Review data inputs monthly so they remain appropriate and up to date
	Over-reliance on gen AI and skills decline	Keep certain outputs fully human-written for comparison and balance
	Staff unsure how to raise issues or concerns	Remind team of the escalation path (Eg, responsible gen AI contact or project lead)

Don't just aim for one mitigation for each risk. Think of the categories of risk strategy from the previous slide, and how these could apply to each risk

Example checklist to verify gen AI outputs against ethical and risk guardrails

- ☐ I am responsible for all content I produce with gen AI, in accordance with our organisation's AI policy
- ☐ Appropriate Subject Matter Experts (SMEs) have reviewed the generated content
- ☐ I have communicated the use of gen AI to relevant groups

1. Hallucination and accuracy	☐ Are the data points, studies, and claims real, verifiable and properly sourced? Has a human personally checked them?	☐ Does the content accurately reflect underlying data (no invented findings, projections, or citations) and has the accuracy of key statements been confirmed?	
2. Governance and regulation	☐ Does the content comply [NFP's] policies and procedures?	☐ Does it meet grant, reporting, copyright, and environmental-claims obligations?	
3. Validation	☐ Does the content include all required elements (Eg, data sources, assumptions, limitations, partners)?	☐ Does it accurately capture the key points from the original brief or input, without omission?	
4. Appropriateness and brand fit	☐ Does the content reflect [NFP's] tone, language, and style guide?	☐ Is the content culturally respectful and free of alarmist, harmful, biased or stereotypical language?	☐ Does the content read as credible and authentic? (Eg, avoids excessive em-dashes or overly generic phrasing)
5. Impact alignment	☐ Does the framing support our mission, values and evidence-based approach?	☐ Is the content structured appropriately for the intended use (Eg, policy brief, project update, media communication) and does it stay within organisational remit?	
6. Environmentally conscious use	☐ Have I prepared or refined the task so gen AI uses only the effort necessary (Eg, refined prompt, smaller model, data cleaning prior to gen AI analysis)?		

True as of December 2025

Click to view template in appendix T

An example of defining success before launching your new gen AI pilot to confirm it was worth the effort

ILLUSTRATIVE **NONEXHAUSTIVE**

Goal	Metric	Baseline	Target	Who tracks it	Notes
Saves staff time	Hours spent on task per week	5 hours	3 hours	Managers and team leads	Pre and post pilot survey
Staff satisfaction	% staff positive about new workflow	30%	60%	HR team, managers and team leads	Pre and post pilot survey and manager observations
Quality improvement	Number of errors and/or revisions needed	4 per doc	2 per doc	Managers and team leads	Human oversight and define metric of "how many revisions were needed"
Mission impact	Hours of volunteers reallocated to high-impact work per week	2 hours	7 hours	HR and operations team	Track hours logged to each task and by each volunteer

It's not enough to document these measures. Your team will need to keep tracking them once the pilot is up and running to validate whether the pilot is working

3. Talent

Upskill staff to use gen AI

NONEXHAUSTIVE



3A Overview

3B Spot and address skill gaps

3C Create workflow training plans

3D Build your best practice libraries

True as of December 2025

Talent checklist

These tasks will help you plan how to upskill staff to use gen AI

NONEXHAUSTIVE

This section will teach you how to do each of the following:

- [ ] Complete skills gap map
- [ ] Create workflow training plan
- [ ] Build best practice libraries



Framework to help NFPs on safe gen AI adoption

Strategic alignment

1. Road map
Align on how to pilot a new gen AI workflow in a way that is efficient, safe and ethical

Delivery capabilities

2. Talent
Upskill staff to use gen AI

3. Operating model
Create a working environment where teams can regularly test new approaches

4. Technology
Update existing technology to enable gen AI

5. Data
Collect and structure data for gen AI to use

Change management

6. Adoption and scaling
Support the new gen AI solution through clear communications, role modelling, training and accountable leadership

True as of December 2025

Overview of Talent

This section suggests ways to spot skill gaps, design training, and create support systems to help your staff feel empowered

Modules and description



3B. Spot and address skill gaps
Determine the skill your team will need and assess current confidence levels



3C. Create workflow training plans
Design simple, scalable trainings to build skills and confidence across the organisation



3D. Build your best practice libraries
Capture and share the knowledge that staff develop through pilots so learning spreads beyond individuals



Gen AI pilot success is built on the skills and confidence of your people; even **small investments in skills will deliver big productivity gains and lasting adoption**

True as of December 2025

Do a skills gap map to identify where you need to focus training efforts

ILLUSTRATIVE **NONEXHAUSTIVE**

3B. Skills mapping

TEMPLATE

Skill area	Current confidence (low/medium/high)	Why it matters	Support needed
…	…	…	…
…	…	…	…
…	…	…	…

Click to view template in appendix T

What is it?

A skills mapping exercise helps you identify which gen AI skills your staff already feel confident in, and where gaps exist

What is the benefit of using it?

It helps determine the right targeted training and where it is needed the most

How to use it?

Think about your new domain workflow in six months' time, what would potentially make it difficult to use?

Use a quick survey, workshop or sticky-note exercise to ask staff questions based off the template

Cluster skills into themes (Eg, prompts, data privacy, reviewing outputs).

Focus on the top 2-3 areas where staff need the most support as a starting point for training

Skills mapping

ILLUSTRATIVE

Skill area	Current confidence (low/medium/high)	Why it matters	Support needed
Eg, Writing effective gen AI prompts	*Medium*	*Staff use gen AI tools for grant writing and community newsletters, but outputs often sound too formal or generic. Better prompting can save time and produce content that matches our tone*	*Short workshop on "prompt writing for NFPs" with examples of good vs. poor prompts and a shared prompt library*
...	...	...	...
...	...	...	...

Activities to consider to address skill gaps

ILLUSTRATIVE **NONEXHAUSTIVE**

In-person/ virtual training

Boost staff confidence in gen AI with practical, hands-on learning sessions that cover gen AI fundamentals, safe and responsible use and the updated workflows

Best-practice guides

Offer clear, step-by-step instructions for staff to use gen AI in daily tasks with examples, prompt templates and tips for reviewing and refining outputs

Expert coaching

Enhance staff expertise with expert-led sessions and on-the-job support, with coaches delivering real-time feedback, answering questions and guiding staff in applying gen AI to workflows

Examples of quick, easy and flexible ways to help teach a new gen AI workflow

Using impact reporting as an example

ILLUSTRATIVE **NONEXHAUSTIVE**

	1	2	3	4
	Lunch and learns	**Micro-learnings**	**Peer-to-peer sharing**	**Guided practice sessions**
	Short, informal sessions where staff can see live demos and/or ask questions	5–10-minute videos, tips and tricks sheets, or prompts of the week sent via email	Staff "show and tell" how they are using gen AI in the new workflow	Hands-on, small-group exercises using the real workflow
Examples	"Gen AI in action" demos: show how to draft a donor update or summarise a report using ChatGPT	Two-minute screen recording showing how to clean data or prompt Gen AI to summarise survey results	Create a short "Gen AI wins" segment in team meetings: staff share how gen AI helped save time or improve clarity	Book a 30-minute "Gen AI practice hour": teams upload data, run prompts, review outputs and discuss improvements

Click to view template in appendix T

Create a training plan for staff using the new workflow

Example training program for new impact reporting workflow

ILLUSTRATIVE **NONEXHAUSTIVE**

	Week 1: Awareness	**Week 2:** Familiarity	**Week 3:** Practical use
Focus	**Awareness of the new workflow**, its purpose and benefits	**Familiarity with the new steps**, how gen AI fits into the current reporting process and how to execute each step safely	**Practical use and guardrails**, applying the new workflow to real data while reinforcing accuracy, ethics and quality checks
Indicative agenda *(not exhaustive)*	30-min Lunch and Learn: live demo of the AI impact-reporting process Show how gen AI drafts reports or summarises survey data Q&A on data safety, approvals and ethical use Share one-page “do’s and don’ts” handout	10-min micro-learning videos, walking through the steps 30-min team huddle: practise one step of the new workflow (Eg, analysing survey data) Peer sharing: discuss what worked and record prompts in a shared folder	60-min guided practice session: teams upload real program data, run prompts, and edit AI drafts together Review guardrails for data privacy and tone; complete a “risk check” before sharing outputs Document lessons and good examples for the gen AI info hub
Outcome	Staff understand what the new workflow is and why it matters. Team curiosity and buy-in increase	Staff can identify which reporting steps use gen AI. Core users gain comfort with prompts and reviewing gen AI outputs	Staff confidently use gen AI in real reports under supervision Teams apply safe-use guardrails in practice

Include workflow-specific information in a central gen AI info hub

ILLUSTRATIVE **NONEXHAUSTIVE**

Each new workflow or pilot will generate tips, prompts and lessons that others can use. Store these in a shared folder (Eg, SharePoint, Google Drive) so future teams can learn faster

Aim to create best-practice guides for every new pilot or workflow you reimagine, and include them in a central gen AI knowledge hub if available

Example to follow

Examples of what to include in the best practice hub

Guardrail reminders

Clear “do’s and don’ts” for safe use of data and gen AI outputs

Best-practice guides

Contain information such as example prompts and guardrails, and tips for specific use-cases and steps within the workflow

Quick-tip videos

Two-minute screen captures or demos showing what good use looks like

Mini how-to guides

One-page guides explaining each workflow step (drafting, editing, reviewing)

Click to view template in appendix T

Example of a best practice guide

ILLUSTRATIVE **NONEXHAUSTIVE**

Best practices for drafting impact reporting

Use case

Preparing quarterly impact reports for funders

Prompt formula

Act as a [role]. Draft a [task] in a [tone], formatted as [format]

Example prompt

Act as a communications officer. Draft a onepage impact report for funders using the data below. Use a clear, friendly, and professional tone with a structured format: 1. Outcomes achieved 2. Challenges faced 3. Next steps

Tips and tricks

Clearly define the target audience

Request initial bullet points, then develop into a cohesive narrative

Validate data and incorporate qualitative insights

Risks and guardrails

Ensure the tone reflects your organisation’s core values

Avoid including any sensitive information

Verify the accuracy of all statistics

Secure final approval from your manager

Example of prompt-engineering best practices to include in a guide

ILLUSTRATIVE **NONEXHAUSTIVE**

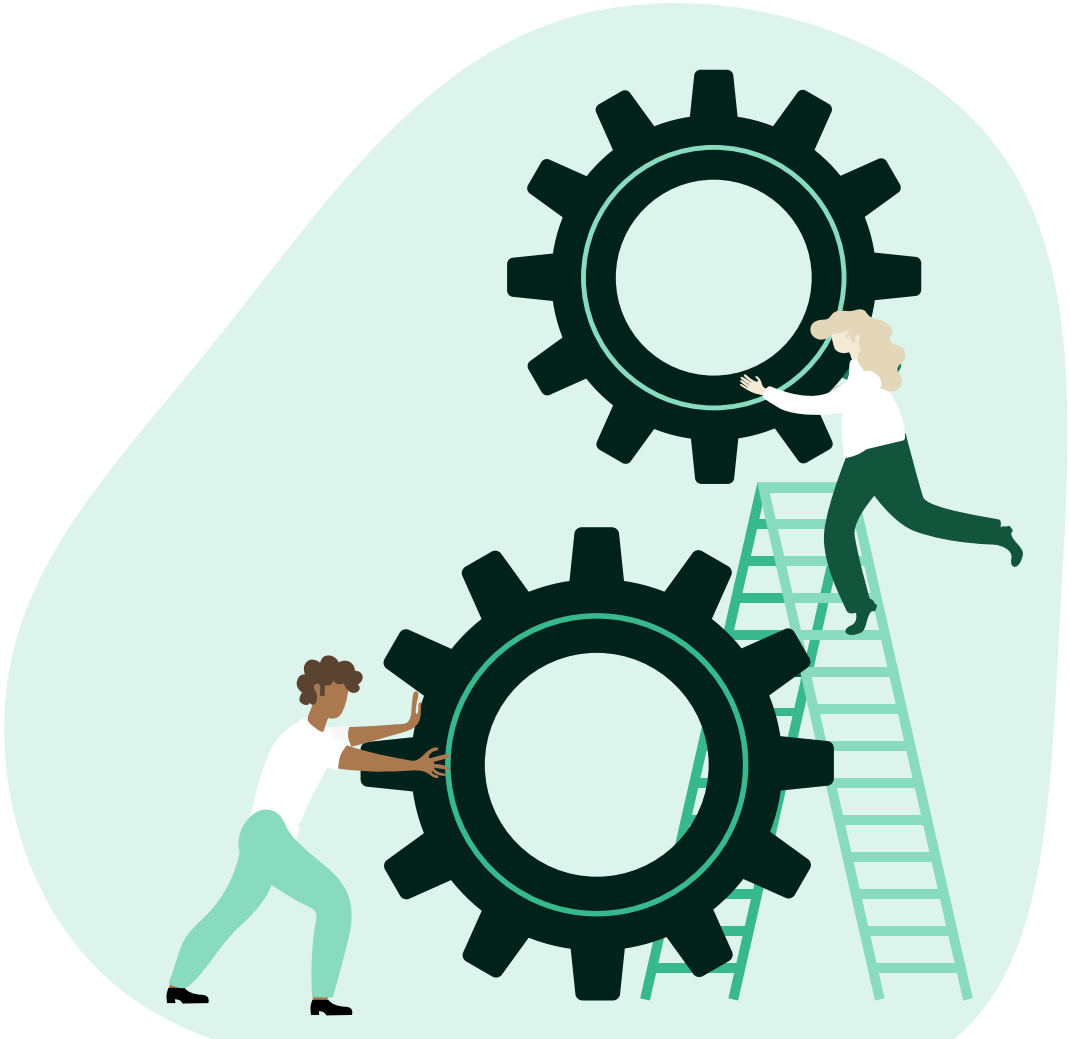
Guideline	What works well	What doesn't work well
Provide pre-instructions *Give the model context on purpose and audience so outputs are relevant*	✓ Prompt: *"You are helping prepare a quarterly impact report for funders. Use the data below to create a one-page summary that highlights outcomes, challenges, and next steps in plain English"* ✓ Output: Funder-ready summary, concise and relevant	✗ Prompt: *"Write a quarterly report using this data"* ✗ Output: Correct information included, but tone is formal and academic, not tailored for funders. Needs editing for audience
Specify the format *Tell the model how to structure the answer so it can be reused easily*	✓ Prompt: *"Create three bullet points for the board pack: 1) program outputs, 2) challenges, 3) priorities for next quarter. Keep each point under 20 words"* ✓ Output: Clear bullets ready to paste into slides	✗ Prompt: *"Provide an update for the board on recent activities"* ✗ Output: Useful details but written as long paragraphs, requiring extra effort to turn into bullets
Be directive *State clearly what you want, including length and tone*	✓ Prompt: *"Draft a 150-word donor update about the literacy program. Focus on results from the last quarter and use a warm, appreciative tone"* ✓ Output: Short, donor-friendly message with recent impact	✗ Prompt: *"Write about the literacy program for donors"* ✗ Output: Covers correct content, but blends history and results, and feels like a brochure instead of a targeted update
Use structure for complex outputs *Break tasks into parts so outputs are consistent and reusable*	✓ Prompt: *"Draft annual report content in three sections: 1) headline under 10 words, 2) two short paragraphs on impact, 3) closing thank-you for funders"* ✓ Output: Neatly separated content that can be dropped into templates	✗ Prompt: *"Write text for the annual report about program outcomes"* ✗ Output: All information lumped together. Contains impact data but mixed with acknowledgments and stories in one block
Match tone to audience *Say who it's for and how it should sound*	✓ Prompt: *"Summarise survey data for the annual donor newsletter. Keep the tone appreciative, positive, and easy to read"* ✓ Output: Friendly, donor-focused text with thanks and highlights	✗ Prompt: *"Summarise survey data for stakeholders"* ✗ Output: Accurate but written in a formal, technical style that feels too dry for donors
Use formatting to highlight instructions *Show the model exactly where to act using brackets or labels*	✓ Prompt: *"The literacy program expanded significantly this year. [Add a sentence here about the new community partnerships.] Participation increased by 20%"* ✓ Output: Focused rewrite with well-placed additional sentence. The model understands the bracketed placeholder as the edit location.	✗ Prompt: *"This is my text, can you add something about community partnerships?"* ✗ Output: Model adds content but may place it in the wrong part of paragraph or rewrite more than intended because tasks boundaries weren't explicit



Prompt engineering is crafting prompts with clarity and structure to optimise outcomes from gen AI

4. Operating model

Create a working environment where teams can regularly test new approaches



4A Overview

4B Match the right person with the right role

4C Test and improve the domain

4D Build it into daily work

True as of December 2025

Operating model checklist

Complete this task to help foster a working environment where teams can regularly test new approaches

NONEXHAUSTIVE

This section will teach you how to do each of the following:

- [ ] Assign workflow owner roles/responsibilities
- [ ] Track and monitor your pilot



Framework to help NFPs with safe gen AI adoption

Strategic alignment

1. Road map
Align on how to pilot a new gen AI workflow in a way that is efficient, safe and ethical

Delivery capabilities

2. Talent
Upskill staff to use gen AI

3. Operating model
Create a working environment where teams can regularly test new approaches

4. Technology
Update existing technology to enable gen AI

5. Data
Collect and structure data for gen AI to use

Change management

6. Adoption and scaling
Support the new gen AI solution through clear communications, role modelling, training and accountable leadership

True as of December 2025

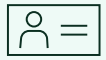
Overview of Operating model

This section covers how to go about integrating your pilot gen AI workflow, or gen AI in general, into your day-to-day work

Effective gen AI adoption depends on clear roles, consistent habits, and structured processes. A strong operating model defines the owners of specific tasks, encourages pilot testing and involves ongoing refinement

To promote the success of the pilot, there **needs to be a clear structure** to allow these workflow changes to become daily practice

Module and description



4B. Match the right person with the right role
Assign clear responsibilities for managing prompts, checking gen AI outputs and handling data



4C. Test and improve the domain
Use quick feedback loops and collaboration principles to refine how gen AI support works



4D. Build it into daily work
Create small habit changes so staff naturally use gen AI in their routines

True as of December 2025

Assign ownership for each part of your new gen AI workflow

ILLUSTRATIVE **NONEXHAUSTIVE**

What is it?

A practical step to assign ownership for each part of your new gen AI-enabled workflow, from prompt design to quality assurance and reporting

What is the benefit of using it?

Builds accountability and confidence in using gen AI tools safely and effectively

Avoids confusion or overlap as new gen AI processes are introduced. Helps sustain adoption by making gen AI part of every role, not a one-off project

How to use it?

1. Define 2-3 core roles relevant to your size, for example:
   - Workflow lead: oversees gen AI use and templates
   - Data lead: ensures inputs and outputs are accurate, private and ethical
   - Gen AI champion: supports staff adoption and shares improvements
2. Document these responsibilities and communicate them in team onboarding, so accountability is visible and shared
3. Iterate regularly: update role expectations as confidence and capability grow

Click to view template in appendix T

When designing your reimagined domain, define clear roles and responsibilities for a smooth rollout

xx To be filled in

ILLUSTRATIVE **NONEXHAUSTIVE**

Role	Name	Responsibilities
Workflow lead	xxx	**Runs the gen AI reporting** process from start to finish Manages **prompts** and **templates** Keeps reports **on track** and **improves** them with feedback
Data lead	xxx	Makes sure reporting data is **accurate** and **complete** **Flags changes** in data sources or issues Ensures data use follows **privacy rules**
Gen AI champion	xxx	**Reviews gen AI outputs** for accuracy and tone **Encourages colleagues** to use the new workflow **Shares good examples** and ideas for improvement

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Click to view template in appendix T

Track your measures of success throughout your pilot

ILLUSTRATIVE **NONEXHAUSTIVE**

Goal	Metric	Baseline	Target	Mid pilot (3 weeks)	Pilot end (6 weeks)
Saves staff time	Hours spent on task per week	5 hours	3 hours	Eg, 4 hours	Eg, 3 hours
Staff satisfaction	% staff positive about new workflow	30%	60%	…	…
Quality improvement	Number of errors and/or revisions needed	4 per doc	2 per doc	…	…
Mission impact	Hours of volunteers reallocated to high-impact work per week	2 hours	7 hours	…	…

These are the same measures of success you defined in the road map section.
Aim to track them at least before (baseline) and after the pilot

The following 8 collaboration principles can serve as a guide to test and refine your new way of working with gen AI

ILLUSTRATIVE **NONEXHAUSTIVE**

1 Communicate openly
Share updates and challenges early through regular check-ins

2 Collaborate as one team
Bring program, data and leadership staff together on the workflow

3 Decide with data
Base choices on real reporting examples, not assumptions

4 Keep it practical
Recognise limits and focus together on the work that matters most

5 Test and learn quickly
Experiment with gen AI on small tasks and adapt fast

6 Focus on "good enough"
Aim for simple, workable solutions that deliver value quickly, rather than perfect answers

7 Know your role
Be clear on who's doing what, and take responsibility for your own tasks

8 Learn from mistakes
Treat errors as part of learning. Share what went wrong so the team can build safer, smarter ways to use gen AI next time

An example of collaboration principles in action

ILLUSTRATIVE **NONEXHAUSTIVE**

Report kick-off

A short session at the start of each report to agree priorities, confirm responsibilities and set timelines

Everyone leaves clear on top of tasks and any dependencies

Weekly huddle

A brief check-in (often 10–15 minutes) to share progress, raise any blockers and adjust plans if needed

Kept short and focused so as not to add extra workload

End-of-report retro

A reflection after workflow completion to celebrate wins, note improvements and agree on small changes

Builds shared learning and makes the process smoother over time



How you go about collaborating depends on your NFP's organisational structure, culture, size and ways of working. Pick the methods which are most appropriate for your NFP

If used correctly, small habit changes can create big productivity gains throughout the day

ILLUSTRATIVE **NONEXHAUSTIVE**

Example of gen AI uses for impact reporting

Generate a checklist of required inputs

Summarise program notes into key insights and themes

Generate a first draft of an executive summary from key insights and themes

Generate a draft of outcomes and case study summaries in donor-friendly language

Fact-check and refine outputs by always reviewing numbers, tone, and context before sharing externally

Save good prompts by adding them into your **best-practice hub** so others can re-use them

An example of how gen AI can be embedded in daily work to boost productivity

Example prompt

ILLUSTRATIVE **NONEXHAUSTIVE**

Morning –
Kick off the day
Turn emails and meetings into a clear plan

You are my daily planner.
From these emails and meetings [paste], list my top 5 priorities for today in order of urgency

Midday –
Work with data
Make raw data easy to understand

You are an analyst.
Summarise this spreadsheet [paste] into 3 key results and 2 challenges in bullet points

Afternoon –
Draft reports and updates
Create polished text for donors or boards

You are an editor.
Review this draft [paste] for accuracy and tone. Suggest 3 improvements in a numbered list

Late afternoon –
Review work
Check for accuracy and improve clarity

You are a communications officer.
Write a 150-word donor update using this info [paste], in a warm but professional tone

End-of-day –
Capture learnings
Record progress and prepare for tomorrow

You are my assistant.
From today's notes [paste], write 3 bullets: what we achieved, key challenges and next steps

5. Technology and data

Update existing technology and data structure to enable gen AI use



5A Overview

5B Baseline your current tech and data foundations

5C Understand the landscape of gen AI tools

5D Select your gen AI tool

5E Pick your data and infrastructure service

Technology and data checklist

Complete these steps to plan your update to existing technology and data structure to enable gen AI use

NONEXHAUSTIVE

This section will teach you how to do each of the following:

- [ ] Categorise technology and data used in current workflow
- [ ] List the decisions needed to achieve minimum viable product (MVP)
- [ ] Complete strategy table to assess options for adapting new tools (optional)
- [ ] Choose an LLM/gen AI core
- [ ] Decide on additional tools needed for future state workflow



Overview of technology and data (1/2)

This section covers a structured approach to assessing the tech and data use in your current workflow, and scoping the requirements of your future pilot workflow

Typical tech and data choices for a gen AI pilot are included as examples. However, the options and considerations here are not exhaustive

If the choices presented here seem overwhelming, focus on the “typical” choices that are highlighted. Other viable opportunities are explored in the deep dives but aren’t necessary for most initial pilots

Module and description

5B. Baseline your current tech and data foundations

Map the tools and data you currently use, identify gaps or overlaps, and define what needs to change to enable gen AI in your workflows

5C. Understand the landscape of gen AI tools

Familiarise your team with the main categories of gen AI tools such as chatbots, co-pilots, and agents, and when each is most suitable for NFP use

5D. Select Your gen AI tool

Choose the large language model or gen AI platform that best integrates with your existing systems and meets your organisation’s data security, usability, and cost needs

5E. Pick your data and infrastructure service

Decide where and how your gen AI tools will run, such as in the cloud or on existing file repositories, and check data storage and privacy are compliant and scalable

Overview of technology and data (2/2)

What readers need to take away from this section

Decision-making: Use a structured approach, placing tech and data tools into different layers or categories so that it's easy to see what you have and what's missing. For situations where you have many decisions to make, each with multiple options, it is suggested you use a structured tool such as a strategy table

Knowledge: Typical requirements for a gen AI pilot in a small NFP are access to an enterprise large-language model (Eg, Microsoft Copilot), in a secure shared data environment (Eg, Microsoft SharePoint) that is hosted on the cloud (Eg, Azure)

Advanced techniques such as fine tuning and APIs are included in this section for completeness but are likely to be too complex or costly for the purposes of a small-to-medium NFP

This section covers a structured to approach assessing the tech and data use in your current workflow, and scoping the requirements of your future pilot workflow

Typical tech and data choices for an AI pilot are included as examples. However, the options and considerations here are not exhaustive

Some definitions that may help for this section:

Large language model (LLM):
The **core AI engine** that reads, summarises and writes text. Think of it as the "brain" of the gen AI. An example would be GPT 5.0, the LLM behind ChatGPT

AI agent:
A configurable digital assistant that can **take actions using your data and tools.** For example, pulling survey results, drafting report sections, or sending updates for review in your impact reporting workflow

API:
A **data bridge** that lets different systems talk to each other. For instance, linking your survey database or CRM so gen AI tools can automatically pull the right information into your report draft

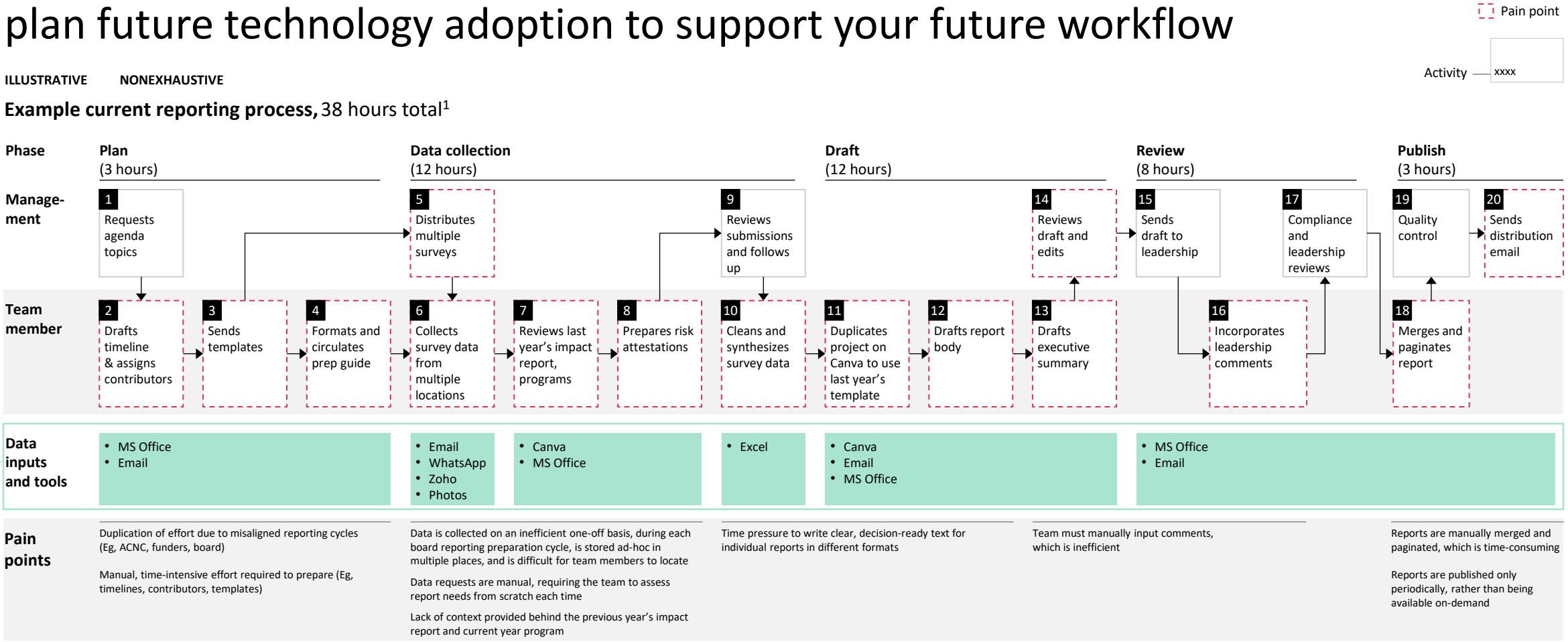
File repository (file repo):
A **shared digital folder** where your organisation stores and organises files. Everyone can find the latest versions of documents in one place, instead of using email attachments. Examples include Microsoft SharePoint, Google Drive, or Dropbox

The cloud:
A **secure online space** where your files and systems are stored and accessed over the internet, rather than on a single computer. This makes it easier for your team to work from anywhere and keep data backed up safely. Examples include Microsoft Azure, Amazon Web Services (AWS), and Google Cloud Platform (GCP)

Your current state, mapped out in the roadmap phase, will be used to plan future technology adoption to support your future workflow

ILLUSTRATIVE **NONEXHAUSTIVE**

Example current reporting process, 38 hours total[1]



How you go about collaborating depends on your NFP's organisational structure, culture, size and ways of working. Pick the methods which are most appropriate for your NFP

1. Hours given as hours per report prepared (which may vary based on the frequency of a particular not-for-profit)

Source: The timing and description of activities per role was completed with the assistance of OpenAI's ChatGPT

Categorise the technology and data used in your current workflow

ILLUSTRATIVE **NONEXHAUSTIVE**

What is it?

List and group the tools and data you already use (such as spreadsheets, surveys, email, or storage) into broad categories or “layers”

What is the benefit of using it?

Avoids overlap with future technology or tools you might add

Helps you find gaps where important information or systems are missing

Creates a clear starting point for improving your workflow

How to use it?

1. Go through the list of tools and data you currently use – you’ve likely done this already during the roadmap phase
2. Sort each one into layers (suggest using **user experience, end-to-end apps, gen AI core, data sources**, **infrastructure**)



These categories aren’t completely separate think of them as **layers that interact with each other**. For example, spreadsheets are a data source, which may be located on a file repository such as SharePoint, another data source, that is hosted by cloud infrastructure. This is illustrated in the coming slides.

How to think about the tools in each layer

ILLUSTRATIVE **NONEXHAUSTIVE**

Broad layer of technology	Where it fits in your workflow	Typical tools or systems	Examples
End-to-end apps	Used to manage whole tasks or functions, such as collecting data, managing participants, or tracking funding and reporting activities	Finance tools	Xero, MYOB
		Marketing or CRM systems	Mailchimp, Salesforce
		Survey collection tools	SurveyMonkey, Zoho
		Project management platforms	Asana, Trello
User experience tools	Supports day-to-day communication, drafting, and collaboration throughout the reporting cycle	Collaboration platforms	Canva, Figma
		Office suites	Office365, Google Workspace
Gen AI Core	Supports creative and analytical work across your process: helping draft text, analyse data or generate visuals for reports and presentations	Large language models (LLMs)	GPT-5, Claude, Gemini
		Image generators	Stable Diffusion, DALL-E 3
Data sources	Stores raw information such as survey results, feedback, attendance or photos that later feed into reports	Spreadsheets	Excel, Google Sheets
		Databases	MySQL, PostgreSQL
		Messaging	Email, WhatsApp
		File repositories	SharePoint, OneDrive
		Structured data storage	Airtable, Dataverse
Infrastructure	Provides secure, shared access to documents and data across your team	Cloud storage	Google Cloud, Azure, AWS
		Shared network drives	Windows File Server

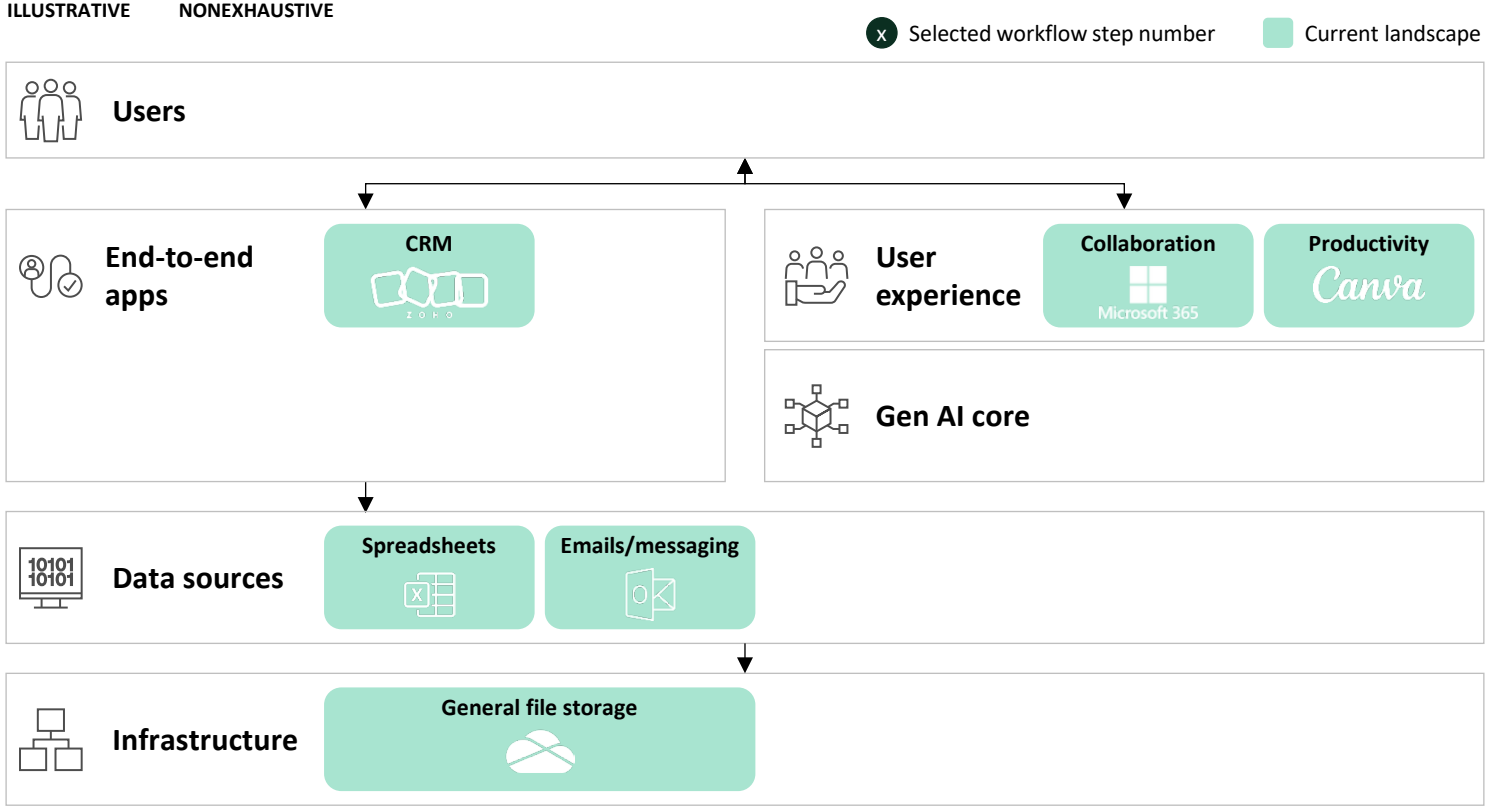


These examples aren't all the possibilities, but these are tools that may help with an impact reporting workflow.
Use this as a guide to help you categorise the tools in your own workflow, and to identify any gaps in your systems

Click to view template in appendix T

Use the details of your existing workflow to map out the technology in its various layers

ILLUSTRATIVE **NONEXHAUSTIVE**



Go through your workflow and categorise the different types of technology used, using the below as an example. You're not listing anything new here, you're just adding structure

How tech is used in the impact reporting workflow

- 5 **Zoho** – Survey collection, program content
- 15 **MS Office** – Report editing
- 7 **Canva –** Report drafting

Gen AI core – In this example, the NFP hasn't adopted gen AI yet

- 11 **Spreadsheets** – Survey data synthesis
- 6 **Email, SharePoint** – Survey collection, program content

- 7 **Cloud storage** – Supports SharePoint/OneDrive
- 6 **General file storage** – Stores local data

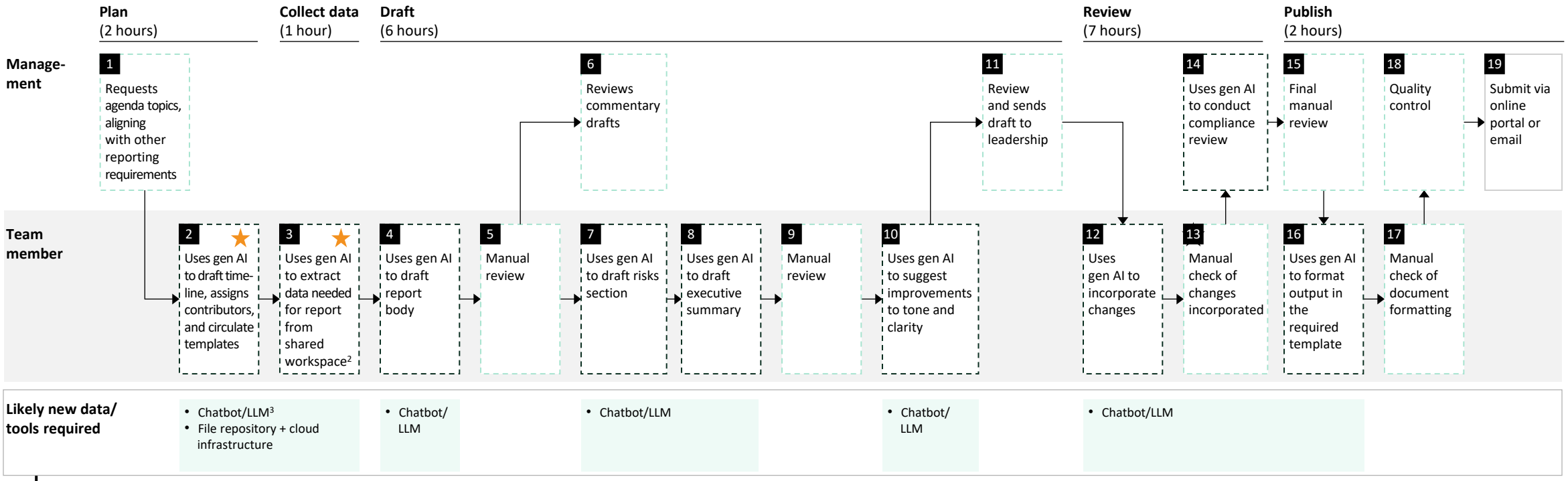
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Use your future state workflow to start planning the data and technology solutions that will be needed

Time saving due to gen AI
Best practice optimisation
★ Additional gen AI methodology details required

ILLUSTRATIVE **NONEXHAUSTIVE**

Example future-state reporting process



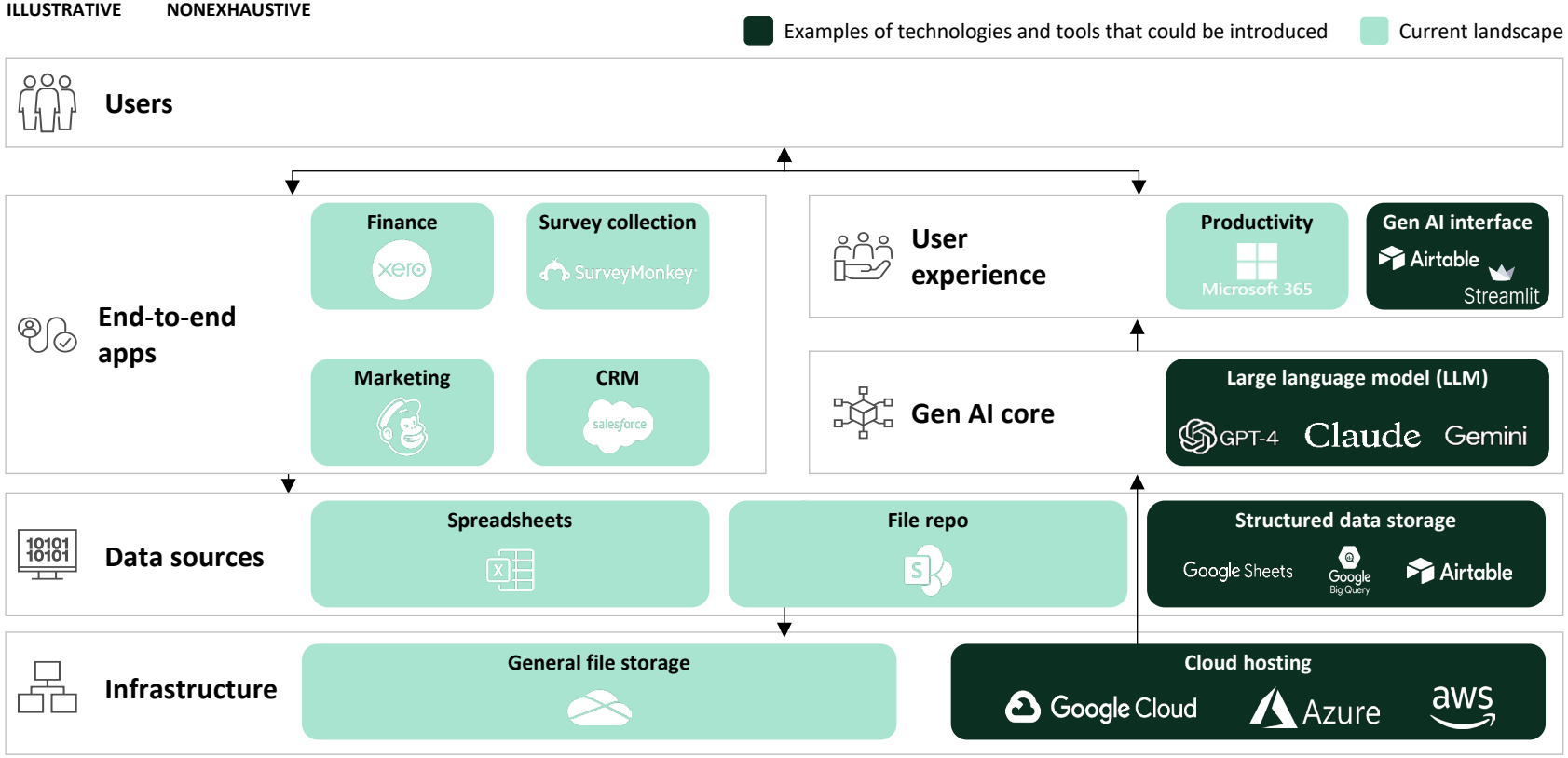
This isn't all the work for data and tech: you'll soon need to make more detailed decisions

1. Hours given as hours per report prepared (which may vary based on the frequency of a particular not-for-profit) | 2. Depends on the tech/data enabler – requires folder of all required source documents and precedents available to upload to LLM | 3. Example of Chatbot/LLM is Microsoft Copilot

Source: The timing and description of activities per role was completed with the assistance of OpenAI's ChatGPT

Your end state is to have your new workflow designed with gen AI in mind: An example of what you could work towards

ILLUSTRATIVE **NONEXHAUSTIVE**



Examples of categories of new tools that could be introduced into to your workflow, which you'll be deciding on later

Additional tech that could improve the new impact reporting workflow

Gen AI interface – tools that help your team draft reports, summarise data, and organise tasks automatically, using plain-language questions instead of complex software steps

LLM – The "brain" behind gen AI tools that can read your data and notes, find key themes, and turn them into clear, human-sounding summaries or reports

Structured data storage – keep all your survey results and program data in one clean, searchable place, so you don't waste time digging through spreadsheets or emails

Cloud storage – a secure online home any data such as past reports, photos, and meeting notes, making it easy for everyone to find and share the right files

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Start to plan a minimal viable product (MVP) to pilot your new workflow

ILLUSTRATIVE **NONEXHAUSTIVE**



What is it?

A minimum viable product (MVP) is a small version of a new idea that has enough features for you to test and assess if it is worth investing more resources to build out further

What is the benefit of using it?

Reduces risk, builds confidence, allows you to learn fast and apply lessons to the next version

How to use it?

1. Decide on a simplified future workflow to test, or choose one clear use case such as drafting the first section of an impact report
2. Select your tools, starting with simple ones first if possible
3. Run the pilot and measure success, for example hours saved per report
4. Make the go/no-go decision for making your MVP a complete solution

Click to view template in appendix T

After mapping your current state, assess what decisions need to be made to support an MVP of the reimagined domain

ILLUSTRATIVE **NONEXHAUSTIVE**

Layer	Decision area	Typical recommended shift	Factors for discussion
User experience	Interaction with gen AI interface	Use a custom chatbot interface to interact with the gen AI system	i How will staff **use the gen AI tool** in their daily work?
Gen AI core	Degree of specialisation of gen AI solution	Obtain an enterprise gen AI license; consider agents for more advanced workflows	ii Which gen **AI platform** should [NFP] use for its gen AI core? iii What **degree of customisation** or training does the LLM need? iv How much **access to data or other tools** does the gen AI have for prompts or output? v If **modifications** are being made, how should this be carried out?
Data sources	Data storage and requirements	Use at least a shared repository. Use linked data tables or structured data storage when you have multiple sources of data that you may need to analyse with an agent	vi What will [NFP] use personal file storage or an **online repository**? vii What type of system should [NFP] use to **store data**?
Infrastructure	Where tools and data will be hosted	Obtain a license for a cloud service provider	viii **Where** should [NFP] run their gen AI tool from?



These are general recommendations for a small NFP, but your decision depends on your envisioned future workflow and requirements

Consider using a strategy table to align on data and platform, and to propose multiple choices, ensuring gen AI drives value

ILLUSTRATIVE **NONEXHAUSTIVE**

Strategy table

TEMPLATE

Ingoing hypothesis | Final decision

Layer	Decision	Choices			
User experience	i ...	...	...	...	...
Gen AI core	ii ...	...	...	...	
Data sources	iii ...	...	...	...	...
Infra-structure	iv ...	...	...	...	...

Use this tool once you've gathered all the information about what you ***could*** do; it brings structure to making team decisions. Whether you use this or not depends on what you want to achieve with the pilot

You can make a strategy table in Excel, PowerPoint, or even a whiteboard

What is it?

A structured tool to evaluate and compare strategic options by organising decisions and their alternatives

Can be used in situations where you have multiple questions you need to answer

What is the benefit of using it?

It helps you make clear and thoughtful decisions by showing your options and how they connect

Also functions as an **alignment tool** to help your team decide together on effective decisions

How to use it?

List all the critical decisions that need to be made for the strategy

For each decision, outline the possible options or actions

Go in already having an idea of what you want to do (hypothesis), and then make a final decision as a team

Example of a strategy table for impact reporting

ILLUSTRATIVE **NONEXHAUSTIVE**

These are some of the key tech/data questions that you'll need to think about when planning a gen AI pilot for your NFP. As a small NFP, the simpler options are likely to be more suitable given budget, staffing and infrastructure constraints

Layer	Decision	Choices			
User experience	i How will staff **use the gen AI tool** in their daily work?	Existing tools	Form-based apps	Standalone chatbots	In reporting dashboards
Gen AI core	ii Which gen **AI platform** should [NFP] use for its core?	OpenAI GPT	Microsoft Copilot	Google Gemini	Anthropic Claude
	iii What **degree of customisation** or training does the LLM need?	Stock LLM	Tailored tools	Custom API connectors	Fine-tuning or foundation model training
	iv How much access to **data or other tools** does the gen AI have for prompts or output?	Prompt engineering (manual prompting)	Context engineering (access to data)	AI agents (access to data and tools)	
	v If **modifications** are being made, how should this be carried out?	No modifications	No-code/low-code solution	Fully coded solution	
Data sources	vi Should [NFP] use personal file storage or an **online repository**?	Personal file storage	Shared file repository		
	vii What type of systems should [NFP] use to **store data**?	Simple online spreadsheets	Linked data tables	Big data platforms	
Infra-structure	viii **Where** should [NFP] run their gen AI tool from?	On the cloud	In-house	Hybrid	

In this example, this was the hypothesis before the meeting, because the NFP already uses a cloud drive for their data (Eg, OneDrive or Google Drive)

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Click to view template in appendix T

Example of a completed strategy table for impact reporting

ILLUSTRATIVE **NONEXHAUSTIVE**

Final decision

Layer	Decision	Choices				Reasoning
User experience	i How will staff **use the gen AI tool** in their daily work?	Existing tools	Form-based apps	**Standalone chatbots**	In reporting dashboards	Staff are already used to using chatbots for their existing workflows
Gen AI core	ii Which gen **AI platform** should [NFP] use for its gen AI core?	OpenAI GPT	**Microsoft Copilot**	Google Gemini	Anthropic Claude	It is relatively simple to connect Microsoft Copilot to the NFP's SharePoint to allow it to see the data
	iii What **degree of customisation** or training does the LLM need?	**Stock LLM**	Tailored tools	Custom API connectors	Fine-tuning or FM training	Further customisation would be introducing unnecessary complexity to the workflow
	iv How much access to **data or other tools** does the gen AI have for prompts or output?	**Prompt engineering (manual prompting)**	**Context engineering (access to data)**	AI agents (access to data and tools)		Modifications to the LLM usually aren't necessary for a small NFP with limited resources
	v If **modifications** are being made, how should this be carried out?	**No modifications**	No-code/low-code solution	Fully coded solution		Microsoft Copilot suited the NFP's workflow as they were heavily using Office365
Data sources	vi Will [NFP] use personal file storage or an **online repository**?	Personal file storage	**Shared file repository**			Allowing all relevant files in one place on SharePoint improved the workflow's efficiency
	vii What type of system should [NFP] use to **store data**?	**Simple online spreadsheets**	Linked data tables	Big data platforms		Smaller NFPs likely aren't going to have data to justify the complexity of linked data tables
Infra-structure	viii **Where** should [NFP] run their gen AI tool from?	**On the cloud**	In-house	Hybrid		Simplified setup, reduced IT overhead, and automated updates without in-house infrastructure

In this example, a 15-employee NFP made the following decisions for their impact reporting workflow. The NFP opted for a simple chatbot-based solution that was connected to the team SharePoint on the cloud, allowing the chatbot to automatically see all relevant data

Deep dives to come on each decision

Decisions regarding the complexity of gen AI core solutions are often made together, forming several archetypes

ILLUSTRATIVE **NONEXHAUSTIVE**

Common choice for pilots

Complexity →

Archetype	**1** **Starter** (prompt led)	**2** **Configured** (context-aware)	**3** **Connected** (agent assisted)	**4** **Advanced** (tuned platform)
Example organisation	Volunteer-led food relief charity (≤10 FTE)	Regional disability services provider (30–60 FTE)	Statewide youth services NFP with CRM and case management (100–250 FTE)	National health charity with research arm and clinical data (600+ FTE)
Data/tool access	Prompt engineering	Context engineering	AI agents	AI Agents
Degree of LLM customisation	Stock LLM	Tailored tools / customised API connectors	Custom API connectors	Fine-tuned model
Modification method	No modifications	No-code/low-code	Either code or low-code	Fully coded

You aren't limited at all to these archetypes, but they represent choices often made together. For a pilot it usually helps to start simpler and only increase complexity after testing and learning with your team

True as of December 2025

Decision i: How will staff use the gen AI tool in their daily work?

ILLUSTRATIVE **NONEXHAUSTIVE**

Typical choice for pilot in small NFP

Relative strength: High Medium Low

	Existing tools	Form-based apps	Chatbots	Reporting dashboards
Description	Gen AI added to tools staff already use (Word, Excel, email)	Drag-and-drop apps to build simple reporting workflows	Simple chat app where staff ask questions and get outputs or answers	Gen AI added to dashboards to help summarise data for reports
Example use scenario	Draft a program report directly in Word with Copilot	Generate donor outcome summaries via guided input form	Ask the chatbot to summarise a report	Produce a gen AI-generated donor impact dashboard
Example platforms	Microsoft Copilot, Google Gemini, Notion AI	Retool, Softr, Airtable + OpenAI/ Zapier	ChatGPT, Microsoft Copilot Chat	Power BI, Looker Studio, Tableau
Considerations				
Ease of use	Very familiar, works in Word/Excel	Easy drag-and-drop, quick to learn	Very familiar and intuitive	Clear but needs some data skills
Setup effort	Minimal, ready once enabled	Light setup to connect data	Minimal, ready once enabled	Moderate, new dashboards take time
Cost	*Cost figures and NFP discounts are highly variable and subject to change*			
Technical maturity required	Requires no infrastructure or IT support	Needs light workspace configuration	Requires no infrastructure or IT support	Depends on existing BI setup
Flexibility	Limited customisation	Easily tailored to needs	Custom GPTs or agents available	Limited to structured data
Speed to launch	Available instantly	Fast with light configuration	Available instantly	Fast if tools already in use

Most staff in NFPs will already be used to using chatbots or tools built into office suites, making these types of tools ideal for a gen AI pilot

Source: Expert interviews

True as of December 2025

Decision ii: We can evaluate each gen AI platform against six decision criteria

Decision criteria	Why it matters	Example questions to ask
Fit for purpose	Gen AI platforms deliver the most value when closely aligned to core use cases and workflows	How well does the tool support our top gen AI use cases (Eg, writing, summarising, analysis)? Can it handle our typical file types and workflows reliably?
Ease of use	Simple, intuitive interfaces drive faster adoption and reduce training needs	How easily can staff with limited technical skills start using the tool effectively? Does the interface make it simple to complete day-to-day gen AI tasks?
Cost	*Cost figures and NFP discounts are highly variable and subject to change*	
Setup and ongoing maintenance effort	Lower implementation and upkeep requirements accelerate time to value and reduce IT burden	What internal setup or permissions are required before rollout? How much ongoing maintenance or technical support will the tool require?
Integration with other tools	Seamless integration with existing systems enhances efficiency and reduces friction	Does it connect easily with the tools our teams already use? Will staff need to switch systems to access or use it?
Data and security	Strong data protection safeguards trust, compliance, and organisational reputation	Where is data stored, and who can access it? Does the provider use our data for model training or keep it private?

True as of December 2025

Click to view template in appendix T

Decision ii: Which gen AI platform should be used?

In this example, the NFP wasn't using AI already, so a ready-to-use chatbot does enough to improve efficiency while being easy to use. For NFP's with more advanced needs, AI agents may be a viable upgrade

ILLUSTRATIVE **NONEXHAUSTIVE**

Relative strength: Low Medium High

	Gen AI tool / platform			
	ChatGPT **OpenAI** (ChatGPT Enterprise)	Copilot **Microsoft** (Copilot M365)	Gemini **Google** (Gemini for Workspace)	Claude **Anthropic** (Claude)
Fit for use	Great for general use, natural language processing	Strong for productivity, less for advanced gen AI	Strong for very long inputs, Google Workspace-based productivity	Strong for coding, advanced reasoning
Ease of use	Intuitive chat interface	Easy in Word, Excel, Teams	Easy in docs, sheets, Gmail	Easy in web app
Setup and maintenance effort	Works in browser, no setup	Quick/easy once enabled	Low effort, managed through Google Admin Console	Quick / easy inside web app
Cost	*Cost figures and NFP discounts are highly variable and subject to change*			
Integration with other tools	Connectors for Slack, Google Drive, SharePoint. Skill needed for setup	Deep integration with Microsoft Office, SharePoint, Outlook. Can also connect to Google workspace	Deep integration with Google Workspace (Eg, sheets, docs)	Connectors for Slack and GitHub
Data and security	Enterprise grade protection available, doesn't use data to train model (if business or enterprise versions)	Enterprise grade protection available, doesn't use data to train models	Enterprise grade protection available, doesn't train on data (need to turn off Gemini Apps Activity)	Enterprise grade protection available, doesn't train on data for paid versions (need to opt out)

Performance differences are minor and constantly changing. Instead consider which integrates best with your current tools. For example, Copilot if you use mainly Office365, Gemini for Google Workspace, ChatGPT if you use lots of different tools

These ratings may change depending on the setup of your NFP. For example, your NFP may already use Google Suite but not Microsoft, meaning that Gemini would be rated higher for integration and setup effort than other tools.

Source: Expert interviews, company websites

True as of December 2025

Decision iii: What degree of customisation or training does the LLM need?

Typical choice for pilot in small NFP | Deep-dive to follow

Relative strength: Low | Medium | High

Complexity →

	Ready-to-use *(Stock LLM)*	**Tailored tools**	**Custom API connectors**	**Fine-tuning**
Description	Ready-made gen AI tool you can start using straight away	AI tool built for a specific task, with some setup and adjustments required	Connects your gen AI tool directly to your organisation's systems or data (Eg, surveys, CRM or SharePoint)	A fully custom approach where the base model is retrained or fine-tuned on your organisation's data
Example use scenario	Use an enterprise chat interface to draft a grant proposal	Use a gen AI vendor tool to create donor reports or marketing content	A gen AI assistant automatically retrieves the latest program KPIs from Zoho and drafts a results summary for your impact report	Train a model on several years of program reports and feedback so it can generate impact summaries using a preferred tone and structure
Example platforms	ChatGPT Enterprise, Microsoft Copilot, Gemini for Workspace	Jasper (Marketing), Writer (Content Ops), Yseop (Financial Reporting)	OpenAI API + LangChain, Copilot Studio with Power Automate, Zapier, Airtable Automations	OpenAI fine-tuning API, Azure OpenAI Service
Considerations				
Ease of use	Staff use tools they already know	Staff may need some training	Depends how tool is designed/built	Depends how tool is designed/built
Setup effort	Very low, simply turn it on	Needs vendor setup and support	Requires moderate to high digital skill, low/no-code connectors available	Long and complex process
Cost	*Cost figures and NFP discounts are highly variable and subject to change*			
Technical maturity required	Managed fully by provider	Some integration work required	Basic understanding of APIs or help from IT	Strong IT and data skills required
Flexibility	Fixed features, little customisation	Some options to customise	Allows modification to work with existing systems and data	Can be designed to any need
Speed to launch	Available immediately	Takes time to set up	Weeks to months	Long development timeline

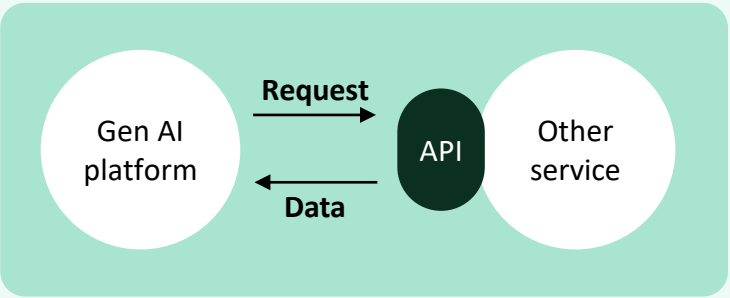
In most cases, a stock LLM improves efficiency while being easy to use. For larger NFPs with more advanced needs, API connectors may be a viable upgrade. Fine-tuning / training a custom model is likely to be far too complex and costly for the needs of an NFP

Most small NFPs will get the most value out of the simpler options

Source: Expert interviews

Decision iii: Determining whether your gen AI needs custom API connections

ILLUSTRATIVE **NONEXHAUSTIVE**



What is it?

API stands for **application program interface**

An **API connection** is a bridge that lets your gen AI tool automatically pull or send information between different systems: for example, between your survey platform, CRM, or reporting templates. Using APIs can make your LLM-powered tools more useful by allowing them to access real data, not just what you type into the chat box

What is the benefit of using an API?

Saves time, automating manual steps like copying survey results or program data into reports

Improves accuracy, pulling live data directly from trusted sources, reducing human error

Allows your gen AI platform to control other tools directly with your permission

Unlocks more value from gen AI, letting your LLM answer richer questions using your organisation's data (Eg, "Summarise the latest volunteer survey results")

How to use it?

1. **Start with your goal**
   Decide what you want the gen AI to know or do, Eg, retrieve data, generate summaries or update records
2. **Check your systems**
   Identify where the data lives (SharePoint, Zoho, Airtable, etc.) and whether those systems already have an available API
3. **Add connections gradually**
   When you need the gen AI to use live data or update other tools, work with IT or your software vendor to connect via an API
4. **Test and secure**
   Confirm that data shared through the API respects your permissions, privacy, and security settings before expanding to other datasets

For most small NFPs, you would likely **start without APIs** to prove the workflow works, then explore connections when you're confident the gen AI's outputs are valuable enough to automate. If your workflow just needs written output (Eg, drafting text) you can use a standard chat tool, no API required

Decision iv: How much access to data or other tools should the gen AI have for prompts or output?

Typical choice for pilot in small NFP | Deep-dive to follow

Relative strength: Low | Medium | High

Complexity →

	Prompt engineering (fully manual)	**Context engineering** (access to data)	**AI agents** (access to data and tools)
Description	Staff manually prompt the gen AI, using prompting techniques to be more specific with instructions. No special setup	Tools or configurations give the LLM access to relevant data and structured context such as past reports, so it produces answers grounded in your organisation's real information	Customisable assistants built inside trusted platforms automate or connect parts of a workflow
Example use scenario	Draft a grant paragraph or board paper summary using a prompt from a prompt library pasted into chat	A chatbot that, instead of relying only on prompts, can search last year's impact reports and survey data to draft a program summary with supporting figures and citations	Build an internal reporting assistant that summarises survey data, drafts report sections, or automates review tasks
Example platforms	ChatGPT Enterprise, Microsoft Copilot, Gemini for Workspace	Microsoft Copilot connected to SharePoint/OneDrive, Google Gemini + Drive, OpenAI + custom retrieval plug-ins	Microsoft Copilot Studio, Power Automate AI, Zapier AI Agents
Considerations			
Ease of use	High — Staff use tools they already know	Medium — Staff may need brief training on how to query or supply data sources	Medium — Staff may need brief training to use agent
Setup effort	High — Very low, simply turn it on	Medium — Requires linking content libraries or folders for retrieval	Low — Needs configuration and linking to data
Cost	*Cost figures and NFP discounts are highly variable and subject to change*		
Technical maturity required	High — Managed fully by provider	Medium — Basic understanding of data permissions and document organisation	Low — Needs digital confidence; no-code solutions exist
Flexibility	Low — Fixed features, little customisation	Medium — Can scale as you add new data sources or refine retrieval rules	High — Logic and workflow can be tailored
Speed to launch	High — Available immediately	Medium — Typically a few days to weeks to prepare data and test retrieval quality	Medium — Weeks to months to set up

Most NFPs can achieve efficiency gains by simply improving their prompting (prompt engineering)

NFPs can improve the performance of gen AI tools by linking to their organisation's existing data (context engineering). In most cases, agents introduce unnecessary complexity, unless there is a lot of repetition in the workflow that could be automated

Source: Expert interviews

True as of December 2025

Decision iv:
Where context engineering might fit into your workflow

ILLUSTRATIVE **NONEXHAUSTIVE**



There are many different ways to achieve context engineering, and some may suitable even for a smaller NFP, such as connecting Microsoft Copilot to a team SharePoint folder

Retrieval tools/connectors such as those in Zapier or Copilot Studio give you more control over what information is accessed, allowing the user to specify what folders are accessed by the tool

What is it?

Context engineering means giving your gen AI tool **helpful background information** so it can answer using your **organisation's own** data: not just general knowledge.

This could include linking your file storage (like SharePoint or Google Drive), adding program details automatically to prompts, or letting the gen AI look up information before replying

What is the benefit of using it?

Improves accuracy: The gen AI uses facts from your reports rather than relying on its training base

Saves time: It already "knows" your key data and templates

Keeps messages consistent: Can use tone from previous reports

Builds trust: Staff see where the information came from

How to use it?

1. Connect your gen AI tool to your shared file folders
2. Add key context by uploading relevant files such as program summaries and survey data
3. Use retrieval tools or connectors (such as Zapier or Copilot Studio) to allow the information you have linked to be retrieved automatically when prompting the gen AI tool

Decision iv:
Where gen AI agents might fit into your workflow

ILLUSTRATIVE **NONEXHAUSTIVE**



For general workflows that don't involve repetition, building an agent can be excessive and may not be worth the time. **Start with a standard chatbot first**, and think about agents if you find yourself repeating your prompts a lot

AI agents are different from agentic AI: Agentic AI is a system that orchestrates multiple AI agents, allowing them to collaborate and act autonomously to achieve a larger, more complex objective

What is it?

An **AI Agent** is a customised digital assistant built on your organisation's data and workflows.

Unlike a standard chatbot, which only answers questions, an agent can **take actions** like retrieving data, generating drafts, or kicking off follow-up tasks, all within your existing systems (Eg, Microsoft Copilot Studio or Google AppSheet)

What is the benefit of using it?

Reduces manual steps: Can pull data from multiple sources (surveys, spreadsheets, reports) and compile it automatically

Creates consistency: Enables each report, grant application, or board brief to follow the same structure and uses approved information

Saves time: Handles repetitive workflows, not just responding to prompts

Improves quality: Uses your own templates and tone, reducing errors and reviewer rework

How to use it?

1. **Identify repeatable workflows** (Eg, creating an impact report, summarising survey results, or preparing board papers)
2. **Define the agent's actions**: What data does it pull? What outputs should it create? Who needs to review them?
3. **Build the agent**: For a small NFP, a low-code tool like Copilot Studio (Microsoft) or AppSheet (Google) is likely most appropriate, however fully customised/coded solutions also exist for advanced cases
4. **Test and refine**: run it alongside your existing process to check accuracy, tone, and value added
5. **Expand gradually**: once trusted, connect it to more data or add new actions like auto-notifications or draft generation

True as of December 2025

Decision v:

File repositories are a suitable starting point for a gen AI data environment

ILLUSTRATIVE **NONEXHAUSTIVE**



For most small NFPs, a **clean, well-organised file repository** is all the "data environment" you need. You can add database links or connectors later if your AI workflow grows

For smaller NFPs, it's best to stick with what you already have. For example, if you are already using Microsoft365 then SharePoint would be easiest, or Google Drive for Google Workspace

What is it?

Your data environment is where your organisation stores the files, reports, and information that your gen AI tool will use to create outputs

For most NFPs, this simply means organising and securing your **file repositories** (Eg, SharePoint, OneDrive, Google Drive, or Box) so they're easy for the gen AI to access when you need them

What is the benefit of using it?

Makes gen AI more useful by allowing it to search for and find your files, data and reports

Improves accuracy as gen AI answers are grounded in your actual work, not generic knowledge

Saves staff time by having a single, shared "source of truth", reducing the need to search across emails and folders

How to use it?

1. **Pick a single storage location:** Eg, SharePoint or Google Drive, and move key program files and reports there
2. **Create a clear folder structure:** Eg, /Impact Reporting/Program Data/Reports by Year/
3. **Set permissions carefully.** Staff should only access what they need. Gen AI tools will inherit these permissions
4. **Tag or label key files:** Mark "final reports", "survey results" or "templates" so gen AI retrieval works cleanly
5. **Review access regularly.** Remove duplicates or old versions, update folder links when projects end

Decision v:

Where your data lives – folder and access setup

Make information easily findable and consistently accessible for both people and gen AI platforms

Tips

Mirror your workflow so teams and gen AI can follow the same logical process from input to reporting to archive

Limit folder depth so files remain easy to find and gen AI can index content without getting lost in nested paths

Standardise naming so documents are searchable, recognisable and consistently categorised across programs

Create separate folders for sensitive and public-facing content, and apply **appropriate access controls** so gen AI only uses information that is approved for analysis

Separate active and archived data so current work stays visible and past years are stored for reference without clutter

Review regularly so folders stay current, reliable, and ready for automated analysis

Example folder structure

📁 **2025 Programs**

01. Key program content
- Workshop_01
  - *01_Session_Material*
  - *02_PostSession_Material*
  - *03_Feedback*
  - *04_Attendees_List*
  - *99_Archive*
- Workshop_02
  - *same structure as above*

02. Communications
- Media Releases
- Partner Updates

03. Admin
- Budgets
- Team Planning

04. Impact tracking
- Monthly_Inputs
- Master_Dataset (central consolidation)
- Insights

📁 **2026 Programs**

(Replicate same structure for consistency)

Decision v: What your data looks like – file and content design (1 / 2)

Structure files to help gen AI interpret and analyse data accurately[1]

General tips

Prefer text-based formats so gen AI can read and process content directly rather than struggling with image-based PDFs or scans

Keep one topic per file so gen AI can interpret the file's purpose accurately and retrieve the right information without confusion

Use standard templates so data from different teams or months follows a consistent structure that gen AI can easily compare and summarise

Use clear, descriptive file names so gen AI can identify and categorise content effectively and users can find files quickly

Use clear headers and subheadings so gen AI can interpret the structure, understand relationships between sections, and summarise accurately

Consider including a short summary or "Read me" section so gen AI and new users immediately understand what the file contains and how to use it

Example of a document with headers and labels

Example of clear headers and labels for gen AI-ready documents

This example demonstrates how to structure a Word document so that gen AI tools can easily read, interpret, and summarise information. It uses clear headers, consistent formatting, and descriptive labels.

1. Program overview
Provide a short summary of the program's purpose, scope, and target outcomes. Include key dates, partners, and the team responsible.

2. Key metrics
Summarise quantitative data in bullet points or tables for clarity.

Metric name	Value	Reporting period
CO_2 emissions reduced	1,250 tonnes	Q1 2025
Households supported	8,400	Q1 2025
Workshops delivered	12	Q1 2025

Table 1.0: Table title to help indicate what this table contains

3. Qualitative insights
Summarise key themes or observations from program activities, such as participant feedback or lessons learned.

4. Risks and mitigations
Identify potential challenges and describe actions being taken to address them. Use bullet points for clarity.

- Risk: Data delays from partner organisations

Mitigation: Set earlier internal deadlines and automate data submissions.

5. Next steps
Outline upcoming actions, deadlines, or decisions. Keep it concise and action-oriented.

1. Some gen AI platforms are designed to interpret or generate images, charts or other media formats (for example, Gemini can analyse screenshots and visuals). The tips on this slide focus on general good practices for preparing text-based, machine-readable data

Decision v: What your data looks like – file and content design (2 / 2)

Design spreadsheets so data is clean, consistent and easy for gen AI platforms to interpret, analyse and summarise

Spreadsheet tips:

Use headers in the first row so gen AI can detect field names and understand what each column represents[1]

Keep one variable per column and one record per row so data remains clean, structured, and analysis-ready (Eg, avoid "Reduced 1,250 tonnes CO_2 and helped 8,400 households")

Avoid merged cells, colour coding or embedded notes so spreadsheets stay machine-readable and compatible with gen AI parsing

Avoid excessive number of sheets per workbook so gen AI can navigate data efficiently without missing or truncating information

If using multiple sheets, consider adding a "Summary" sheet so both users and gen AI know what each tab represents

Keep file sizes manageable (ideally under 10 MB or 100k rows) so gen AI can process and summarise data without timing out

Save files in .xlsx or .csv format so they remain structured and readable by most gen AI and data analysis tools

Example of a table in a spreadsheet

	A	B	C	D	E
1	**Program Name**	**Metric**	**Value**	**Reporting Period**	**Comments**
2	Energy Efficiency	CO_2 Emissions Reduced	1250	Q1 2025	Includes pilot projects only
3	Sustainable Transport	Participants Engaged	5400	Q1 2025	High engagement due to new outreach campaign
4	Renewable Energy	Capacity Installed (MW)	85	Q1 2025	Output ahead of target by 10%

Example of a summary sheet

	A	B	C	D	E
1	**Sheet Name**	**Purpose**	**Last Updated**	**Owner / Contact**	**Update Frequency**
2	Impact Data	Contains quantitative impact metrics by program and reporting period	15 Mar 2025	Impact Measurement Lead	Quarterly
3	Financials	Tracks program budgets, expenditure, and funding sources	12 Mar 2025	Finance Manager	Quarterly
4	Program Feedback	Summarises qualitative feedback and lessons learned	10 Mar 2025	Program Evaluation Lead	Quarterly
5	Summary	Provides an overview of all sheets, data sources, and update frequency	15 Mar 2025	Impact Measurement Lead	Quarterly

1. Gen AI platforms typically read from the first row of each sheet. However, instructions / prompts can be structured to tel l it that the table starts from a different row

Decision v: Ways to keep your data environment secure

ILLUSTRATIVE **NONEXHAUSTIVE** **DOES NOT CONSTITUTE LEGAL ADVICE**

Technology/infrastructure

Use an **enterprise LLM**: certain vendors claim to not use your inputs/data for training their models (Eg, ChatGPT/Microsoft Copilot/Gemini enterprise)

Turn on **multi-factor authentication** (MFA) for all staff accessing shared drives or cloud tools

Consider a cloud hosting provider that hosts data in your **home country or trusted jurisdictions**

Store all gen AI-generated files in your **official shared workspace** (SharePoint, Google Drive), not personal folders

Systems/governance

Keep a **register** of where your organisation's key data lives, review quarterly

Make **clear and visible rules** regarding what data can/can't go into AI tools, who approves new tools, and escalation points

Establish a **confidential feedback** channel for staff that have a concerns surrounding data safety/privacy

Establish a **data risk/safety team** or appoint leaders to take ownership of the area

Ensure that your organisation is following your jurisdiction's **AI safety and data privacy laws** (Eg, the EU AI Act)

People

Train all staff and volunteers on **basic data safety habits** (no client or donor data in public tools, use MFA, strong passwords)

Nominate gen **AI champions** to be go-tos when staff or unsure concerning data safety

Run **short refreshers** in team meetings every quarter

Check that all staff sign the organisation's **responsible gen AI policy**



These are examples of how your organisation can keep its data safer. Not all of these may apply, for example a micro NFP may use a checklist instead of a formal data policy

Source: Company websites, expert interviews, National AI Centre, *Guidance for AI Adoption: Foundations*, 2025.

Decision vi: What type of systems should be used to store data?

ILLUSTRATIVE **NONEXHAUSTIVE**

Typical choice for pilot in small NFP | Practical in certain situations

Relative strength: High | Medium | Low

	Simple online spreadsheets	Linked data tables	Big data platforms
Description	Spreadsheet-style tools for simple entry and reporting	Structured system for linked datasets, reliable with support	Cloud platforms for very large structured and unstructured data
Example use scenario	Track volunteer hours or donor updates	Store donor, finance or outcomes data with relationships	Combine surveys, finance and outcomes for annual reports
Example platforms	SharePoint, Airtable, Google Tables	MySQL, PostgreSQL, Microsoft SQL Server	Google BigQuery, Snowflake, Redshift, Databricks
Considerations			
Ease of use	Familiar spreadsheet-style	Some learning for staff[1]	Specialist skills needed
Setup effort	Quick setup	Simple with support	Slower, more complex setup
Cost	*Cost figures and NFP discounts are highly variable and subject to change*		
Technical maturity required	Works with existing tools	Simple if integration supported during pilot[2]	Requires advanced data team
Flexibility	Limited for larger datasets	Handles complex reporting	Works across structured and unstructured data
Speed to launch	Deploy immediately	Fast with support[2]	Slower to configure

Simple online spreadsheets often suffice for small NFPs. Use linked data tables when your NFP manages multiple related datasets like donors, programs and outcomes that need to connect and update reliably across reports.

1. Staff can use dashboards / front-end tools with training provided during pilot

Source: Expert interviews

Decision vii: Where should NFPs run their gen AI tools from? (1/2)

ILLUSTRATIVE **NONEXHAUSTIVE**

Typical choice for pilot in small NFP

Relative strength: Low Medium High

	In the cloud	In-house	Hybrid
Description	System runs in a major cloud provider and connects to a gen AI service (e.g. OpenAI)	System runs fully on computers and servers owned by [NFP]	Some parts run in the cloud and others stay on local servers
Example use scenario	Staff log into a secure web app to create impact reports using gen AI	Keep donor or client records on internal servers due to strict privacy rules	Store sensitive client data locally while running reporting tools in the cloud
Example platforms	Google Cloud, Microsoft Azure, AWS with OpenAI API	Local IT servers	Mix of cloud services with local file servers
Considerations			
Ease of use	High – Staff access through a simple web login	Medium – Staff depend on IT team to set up and maintain access	Medium – Staff may need to use two systems
Setup effort	High – Low effort with support, ready in days[1]	Low – High effort – new servers must be bought and configured	Medium – Medium – cloud setup plus linking to local systems
Cost	*Cost figures and NFP discounts are highly variable and subject to change*		
Technical maturity required	High – Cloud provider and light setup support[2]	Low – Full IT team needed to run and maintain	Medium
Flexibility	High – Easy to scale and add features	Medium – Limited – fixed by local infrastructure	Medium – Can be flexible but more complex
Speed to launch	High – Very quick – up and running in days	Low – Slowest – weeks or months to buy and install servers	Medium – Slower – must set up both cloud and local systems

A cloud setup is the best for speed, security and flexibility without heavy IT demands. Setup is simplified and updates are automated

1. Setup and integration support can be provided to accelerate delivery
2. Support for setup, migration, and admin can be provided during the pilot, using templates and accelerators to speed up launch

Source: Expert interviews

True as of December 2025

Decision vii: Where should NFPs run their gen AI tools from? (2/2)

ILLUSTRATIVE **NONEXHAUSTIVE**

Relative strength: Low Medium High

	Platform		
	Google Cloud	Azure	aws
	Google Cloud	**Microsoft Azure**	**Amazon Web Services (AWS)**
Ease of use	Clean, simple console; easy for small teams	Familiar if using Microsoft 365 SharePoint; some learning needed otherwise[1]	Powerful but busy console; new users need training
Setup effort	Quick start; few services to wire together	Needs basic identity and security setup; smoother with Microsoft 365[1]	Heavier initial configuration
Cost	*Cost figures and NFP discounts are highly variable and subject to change*		
Technical maturity required	Basic cloud admin skills	Needs IT admin familiarity; simpler if on Microsoft 365[1]	Requires experienced cloud admins for secure day-to-day operations
Flexibility	Best inside Google ecosystem, otherwise inflexible	Broad services and integrations across the Microsoft ecosystem[2]	Widest service range and patterns; very configurable[2]
Speed to launch	Best inside Google tools; fewer enterprise integrations at scale[2]	Quick once identity/licences set up[1]	Slower to start; fast once foundations are in place

Any major cloud provider is a workable option for NFPs. Pick the one that matches up with your existing tools. Other options also exist.

1. If already using Microsoft 365, Azure setup and user management is simpler and familiar
2. Azure and AWS are more established in gen AI, with proven tools and integrations at scale

Source: Expert interviews

True as of December 2025

Remaining in one ecosystem can reduce complexity for smaller NFPs

ILLUSTRATIVE **NONEXHAUSTIVE**

Rationale for staying within one ecosystem[1]

Tight native integration	Tools "see" each other's data automatically: Eg, Microsoft Copilot can access SharePoint, OneDrive, Teams, and Outlook without custom connectors or APIs
Unified identity & security	One login (Eg, Microsoft Entra ID / Google Workspace Identity) manages access across mail, files, gen AI assistants and analytics — reducing admin burden and security risk
Reduced setup & maintenance	Single vendor means fewer integration points to manage, fewer updates to coordinate, and simpler compliance processes
Lower learning curve	Staff already use the tools (Word, Excel, Gmail, etc), so adding gen AI or analytics features builds on familiar workflows
Centralised data governance	Easier to apply permissions, retention and sharing rules consistently across all data sources
Consistent support & licensing	One support channel and a bundled license model often reduce total cost and administrative complexity

Larger NFPs may prefer to mix and match between different ecosystems, gaining more flexibility and avoiding being locked to a single ecosystem

1. Not universal to all ecosystems

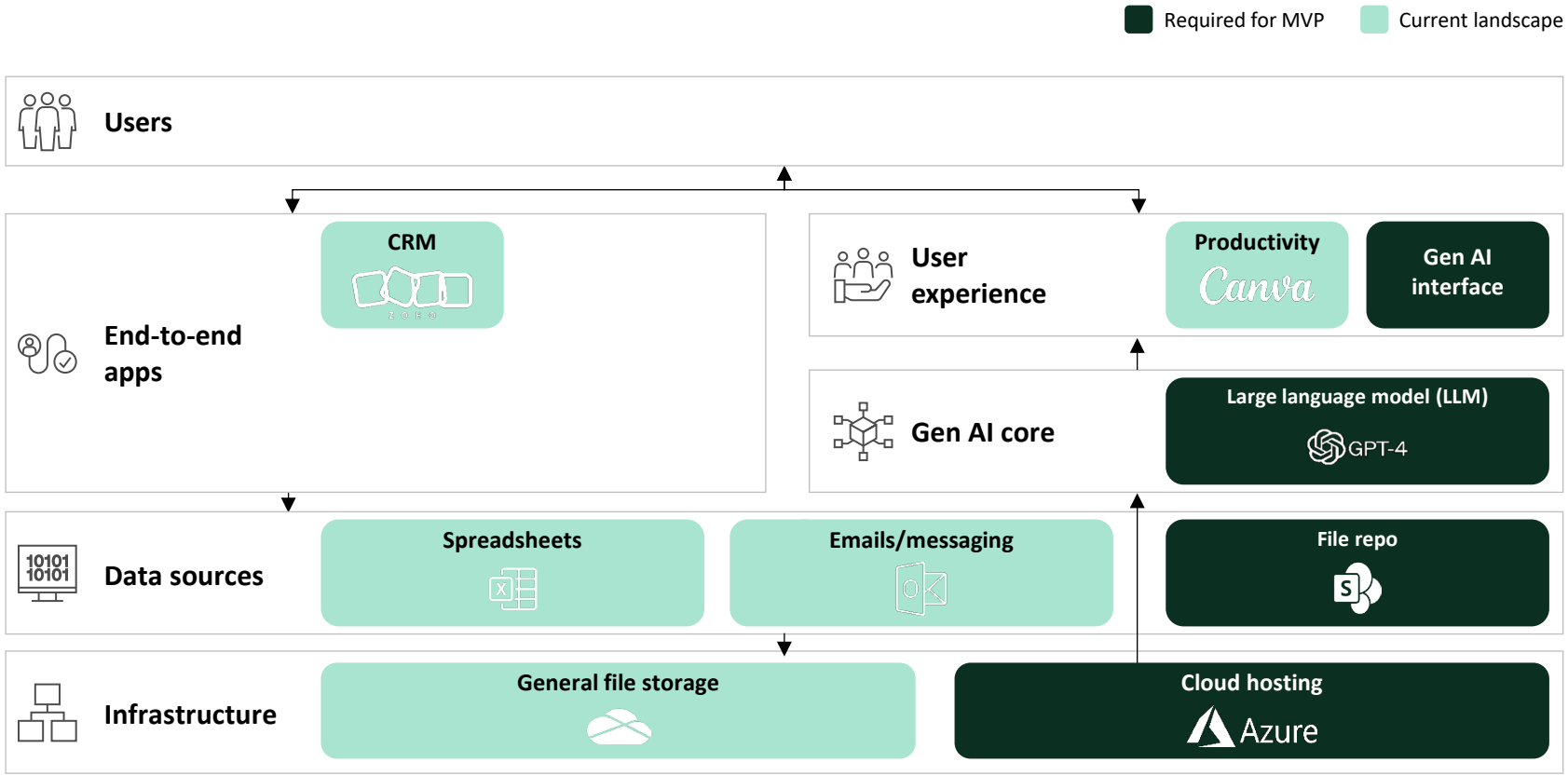
Example ecosystems

		Microsoft	Google	SalesForce
Typical focus		*Productivity, collaboration, gen AI copilot integration*	*Simplicity and cloud-native collaboration*	*CRM and impact tracking*
Example components	Productivity	Word, Excel, Teams, Outlook	Docs, Sheets, Meet, Gmail	Slack, Quip
	Data storage	SharePoint, OneDrive	Drive	Salesforce data cloud
	Gen AI and Automation	Copilot, Power Automate, Azure OpenAI	Gemini, Vertex AI	Einstein AI
	Analytics	Power BI	Looker Studio	Tableau
	Infrastructure	Azure	Google Cloud	Salesforce Cloud

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Example end state for the impact reporting workflow

ILLUSTRATIVE **NONEXHAUSTIVE**



These are the final new technologies chosen to enable piloting the new workflow in our impact reporting example

How the new tech improves impact reporting

Gen AI interface – team interacts with chatbot interface from within Canva

LLM – works as the "brain" behind the chatbot interface, allowing analysis of data, summary of reports and drafting of new content

File repo – allows all files and survey data to be stored in one place

Cloud storage – Infrastructure underlying SharePoint

6. Adoption and scaling

Support the new gen AI solution through clear communications, role modelling, training and accountable leadership



6A Overview

6B Build support across the organisation

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Adoption and scaling

Complete a communications plan to help support the new gen AI solution

NONEXHAUSTIVE

This section will teach you how to do each of the following:

- ☐ Populate four quadrants of the Influence Model with initiatives
- ☐ Create gen AI communications plan



Framework to help NFPs on safe gen AI adoption

Strategic alignment

1. Road map
Align on how to pilot a new gen AI workflow in a way that is efficient, safe and ethical

Delivery capabilities

2. Talent
Upskill staff to use gen AI

3. Operating model
Create a working environment where teams can regularly test new approaches

4. Technology
Update existing technology to enable gen AI

5. Data
Collect and structure data for gen AI to use

Change management

6. Adoption and scaling
Support the new gen AI solution through clear communications, role modelling, training and accountable leadership

Overview of Adoption and scaling

Embedding gen AI requires clear communications, sustained leadership commitment, and ongoing reinforcement. Implement strategies to build confidence, shift mindsets and celebrate progress, ensuring seamless organisation-wide adoption beyond siloed teams



Adoption requires deliberate action. Leaders must model behaviors, highlight successes, and consistently promote safe practices to **drive sustainable change**

Module and description



6B. Build support across the organisation
Use the Influence Model to drive mindset and behaviour change through communication, role modeling, skills building and reinforcement

Use the Influence Model to develop a plan for adoption of the new workflow

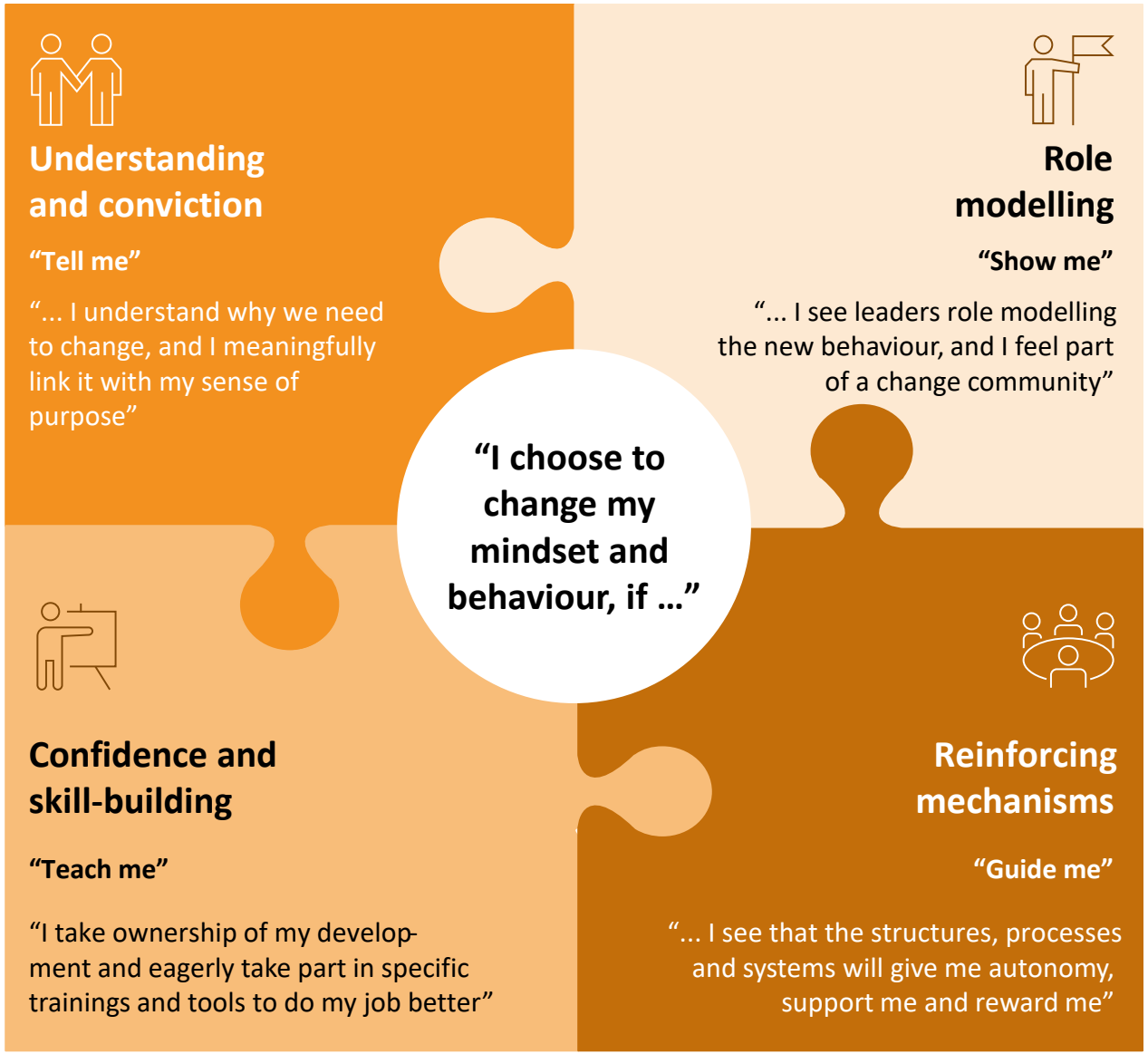
Overview

The Influence Model is a framework that helps create a comprehensive plan by focusing on the desired shifts in mindset and behaviours in four key areas:

- Understanding and conviction
- Role modelling
- Confidence and skill-building
- Reinforcing mechanisms

How to use it – individually or with your team

1. Brainstorm: what are the limiting mindsets and behaviours holding back gen AI adoption today?
2. Develop interventions along the four quadrants of the Influence Model to address these limiting mindsets and behaviours



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Click to view template in appendix T

Example of interventions mapped to the Influence Model

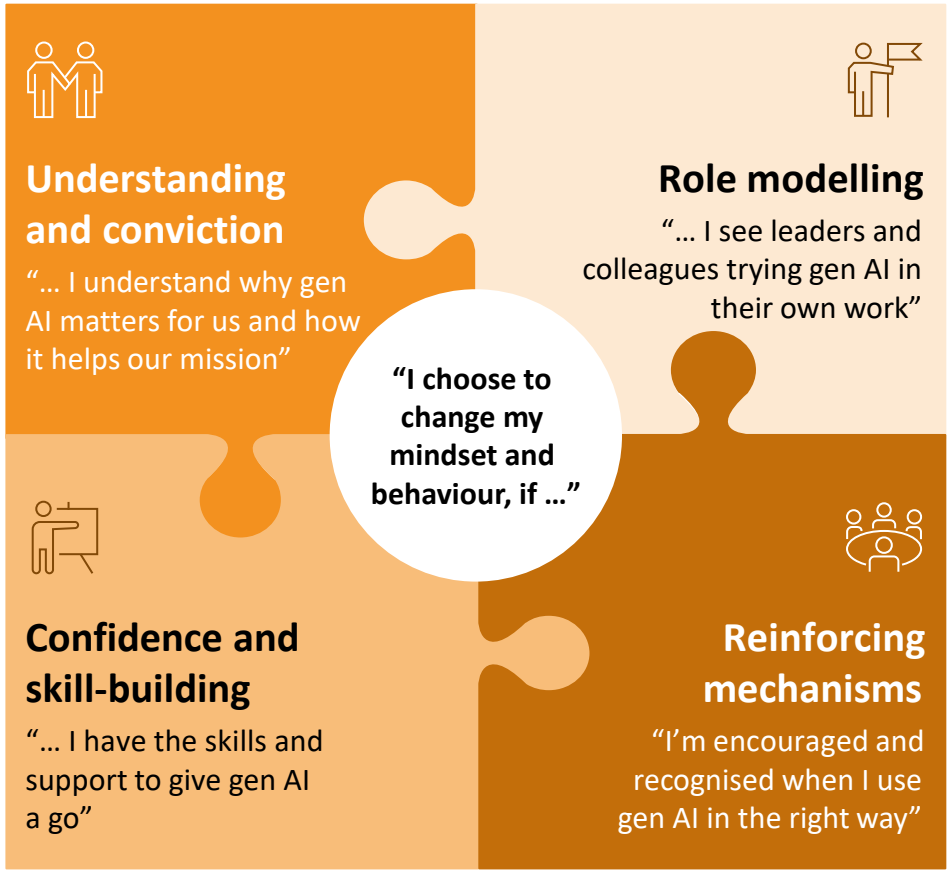
ILLUSTRATIVE **NONEXHAUSTIVE**

A

A **communications roadmap and email templates** sharing updates on the new workflow, helping to explain the purpose and benefits of the new tools

C

A bank of **best practice guides** for using the new workflow, paired with **hands-on training sessions** designed to give staff practical knowledge and skills



B

Leaders and champions **visibly seen** using the new workflow and tools, Eg, to draft real impact summaries, showing staff that safe, practical experimentation is encouraged

D

Weekly updates **celebrating pilot progress** and **shared success stories** of staff learning to use the new tools

Click to view template in appendix T

Gen AI communications plan for smaller NFPs

Let's map out how to talk about the pilot workflow over the next six months – what forums to use, how often, and what messages to share

Understanding & conviction
"Tell me"



ILLUSTRATIVE

	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
All-staff touchpoints	*Eg, Add 10-min gen AI introduction to team meeting: why it matters, pilot overview*	*Eg, Include 5-min gen AI highlight in fortnightly team meeting*	...	...	...	...
Gen AI updates	*Eg, Short message on chat/email: "What we're trying with gen AI this month"*	*Eg, Announce any workflow updates*	...	...	...	...
Mini-training/ demos	*Eg, Demo: how to use gen AI for summarising meeting notes*	*Eg, Training for the new workflow*	...	...	...	...
Feedback loops	*Eg, End of meeting: quick "what do you think" round*	*Eg, Firm poll on "what's working / what's confusing?"*	...	...	...	...



It's important to tailor your communication plan to the size of your organisation. This plan suits a smaller NFP (Eg, 10-15 FTEs)

Click to view template in appendix T

Gen AI communications plan

Let's map out how to talk about the pilot workflow over the next six months – what forums to use, how often, and what messages to share

Understanding & conviction
"Tell me"

ILLUSTRATIVE

	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
All-staff town halls	*Eg, Launch town hall: CEO introduces the gen AI initiative and why it matters for mission and efficiency*	*Eg, No new town hall, gen AI updates integrated into the regular all-staff meeting*	...	...	...	...
Gen AI email updates	*Eg, Kick-off email from leadership with FAQs, gen AI principles, and link to internal "getting started" guide*	*Eg, Monthly newsletter: highlight early pilot stories, share first data on time saved or quality improvements*	...	...	...	...
Dedicated training	*Eg, Short intro webinars for all staff: overview of tools, safe use, and practical examples*	*Eg, Hands-on training for pilot teams (Eg, fundraising)*	...	...	...	...
Feedback forums	*Eg, Post-launch survey to gauge awareness and readiness, use results to shape comms tone and cadence*	*Eg, Team huddles/quick reflection rounds ("what's working, what's tricky?"); gen AI champions facilitate*	...	...	...	...

This plan suits a larger NFP with, for example, over 50 employees

Example of an eight-week communications plan to deploy for a new workflow pilot

ILLUSTRATIVE **NONEXHAUSTIVE**

Example templates follow

Understanding & conviction
"Tell me"



Week 0
Weekly meeting segment

Dedicate the last ten minutes of the all-staff meeting to introduce the impact reporting pilot and its purpose



Week 1
Pilot launch email

Org-wide message from leadership introducing the gen AI pilot, emphasising safe use, purpose, and benefits for reporting





Week 2
Training announcement

Announcement of hands-on training sessions on responsible use of the new workflow to be delivered in week 4

Week 3
Begin bi-weekly email blast

Start a short bi-weekly email with pilot highlights (*"We saved three hours drafting our last report"*), practical tips and prompts



Week 5
Bi-weekly email

Share early pilot outcomes: hours saved, report examples and quality improvements; reinforce "safe use" principles



Week 7
Bi-weekly email

Share updates on the workflow.
Highlight quotes or reflections from champions who've led practice sessions



Week 8
Feedback forum

Host a short two-way discussion (virtual or in-person) to collect reflections from staff involved in the pilot

Email drafts

ILLUSTRATIVE

Understanding & conviction
"Tell me"

Pilot launch email:

Announcing [NFP]'s gen AI pilot and building excitement

Subject:

[NFP] is launching a generative AI (gen AI) pilot – here's what it means for you

Hello team,

We are excited to launch a new gen AI pilot at [NFP]. This is about making our reporting and communications faster, clearer, and easier – giving us more time to focus on impact.

Gen AI will not replace anyone's work. It is a supportive tool designed to save time and help us produce high-quality reports and updates.

Over the next six weeks, you'll see:

- Short training sessions to get started
- Weekly emails with simple gen AI tips
- Stories of how your colleagues are using gen AI in their work

We encourage everyone to try gen AI, share feedback, and help us learn together.

Thank you,
[Leader's name]

Weekly email blast:

Celebrating gen AI wins and sharing tips

Subject:

[NFP] gen AI weekly update – wins, leaderboard, and this week's tip

Hello team,

Here's this week's update from the gen AI pilot:

Win story
[Example win story, Eg, The fundraising team used gen AI to turn survey results into three board-ready bullets in under ten minutes – saving over an hour of manual editing]

Gen AI usage leaderboard
Congratulations [Person X]! You are top of the AI usage board this week with [XXX] prompts entered into [tool]. Your [gift voucher] will be waiting for you in your inbox.

Keep exploring and sharing your experiences – every use helps us learn and improve.

Thank you,
[Project team / sponsor]

Gen AI tip of the week
[Insert this week's tip and example prompt here]

Showcase the new workflow by recognising usage leaders and sharing achievement stories

Reinforcing mechanisms
"Guide me"

ILLUSTRATIVE **NONEXHAUSTIVE**



Distribution methods

You can share these ideas through staff meetings, IM messaging platforms like Slack or Teams, email communications or intranet newsletter articles



Recognition ideas

Track who is experimenting the most with gen AI or the new workflow and create a **gen AI usage leaderboard**

Nominate a monthly or bi-monthly **"gen AI champion"**

Broadcast shout-outs on IM platforms of staff who helped with the pilot, thought of new ways to save time with gen AI or contributed to knowledge sharing



Storytelling ideas

Share wins from new pilots with the organisation

Create short **show-and-tell sessions** where staff share their experience with the pilot

Share **"day in the life"** highlights of how a staff member used gen AI across their whole day

Examples of gen AI exercises that can build staff confidence

ILLUSTRATIVE – TO BE ADAPTED



If appropriate for your workplace, these exercises can be incorporated into weekly tips and distributed as firm-wide emails

Confidence & skill-building
"Teach me"



Exercise	Brief examples to use in learning sessions
Shorten long text into quick summaries	**Did you know** gen AI can shorten long text into something quick and easy to read? ***Why don't you try …*** *"Summarise this 300-word draft [paste] into 100 words, keeping the key points only"*
Turn rough bullets into polished text	**Did you know** gen AI can turn bullet points into a polished paragraph? ***Why don't you try …*** *"Turn these bullet points [paste] into a short update for the newsletter"*
Reformat messy notes into a clear table	**Did you know** gen AI can reformat information into a table? ***Why don't you try …*** *"Organise this information [paste] into a table with columns for Outputs, Challenges, Next steps"*
Turn notes into clear talking points	**Did you know** gen AI can create draft talking points for a meeting? ***Why don't you try …*** *"Create 3 talking points from these notes [paste] that I can use to brief my team"*
Make text clearer and easier to read	**Did you know** gen AI can check text for clarity and plain English? ***Why don't you try …*** *"Review this draft [paste] and rewrite it to be clearer and simpler"*
Use gen AI to draft thank-you notes	**Did you know** gen AI can draft quick thank-you notes for colleagues or partners? ***Why don't you try …*** *"Write 2 short thank-you messages for a volunteer who helped at last week's event"*
Repurpose reports into social media posts	**Did you know** gen AI can create social media posts from longer text? ***Why don't you try …*** *"Turn this report section [paste] into 3 short social posts for LinkedIn"*
Turn notes into ready-made discussion questions	**Did you know** gen AI can generate reflection questions to spark discussion? ***Why don't you try …*** *"From these workshop notes [paste], suggest 3 reflection questions I can use with my team"*

7. Appendix



7A Glossary of AI and gen AI terms

7B Tool evaluations

7C Templates

Glossary of AI and gen AI terms

NONEXHAUSTIVE

Term	Definition (plain language)
Artificial Intelligence (AI)	Technology enabling computers to execute tasks traditionally requiring human intelligence, such as language comprehension and pattern recognition
Generative AI (gen AI)	AI designed to generate new content – such as text, images, audio, or code – in response to user prompts
Prompt	Clear and precise instructions or questions to drive optimal AI tool performance. Strong prompts yield superior outputs
Prompt engineering	Crafting prompts with clarity and structure to optimise outcomes from gen AI
Large Language Model (LLM)	Gen AI systems like ChatGPT that leverage extensive text -based training to produce responses that mimic human communication
Chatbot	A gen AI tool designed for conversational interaction, such as ChatGPT or Copilot, delivering responses in natural language
Hallucination	When gen AI generates information that appears credible but is inaccurate or fabricated
Training data	The data that trains an AI model. Its accuracy and fairness depend on the quality and diversity of this data
Data	Your organisation's collected, stored and utilised information (Eg, donor records, service usage, program outcomes)
Data privacy	Safeguarding sensitive information, such as donor or client data, to prevent unauthorised exposure to AI tools without consent
Cloud	Cloud-based servers and software, such as Microsoft 365, Google Workspace or AWS. The majority of gen AI tools operate on these platforms
Workflow	The structured sequence through which tasks are executed in your organisation (Eg, writing reports, processing donations)
Reimagined workflow	Streamlining workflows by leveraging gen AI for repetitive tasks, enabling staff to concentrate on higher-value activities Example: gen AI drafts a report → staff validate accuracy → manager approves
Domain	A targeted area within your organisation where gen AI can deliver value (Eg, fundraising, impact reporting, volunteer management). Pilots are most effective when concentrated on a single domain
Bias	When gen AI generates outcomes that disproportionately benefit or harm specific groups, typically due to biases embedded in the training data
Guardrails	The guidelines and boundaries established to ensure staff use gen AI responsibly and securely
Human in the loop	Human review and approval of AI-generated outputs prior to finalisation
Ethical AI	Leveraging AI to ensure fairness, transparency, and alignment with organisational values
API (Application Programming Interface)	A “bridge” enabling seamless connection between software tools, often facilitating gen AI integration into existing systems
Use case	Practical applications for gen AI, such as drafting grant applications or summarising reports, streamlining complex tasks with efficiency
Pilot	A controlled test of a gen AI tool in a secure setting prior to broader deployment
Workslop	AI-generated work content that looks polished on the surface but lacks substance to meaningfully advance a given task, often causing more problems that it solves
Context engineering	Giving your gen AI tool helpful background information so it can answer using your organisation’s own data

Scorecard of gen AI tools for building small-scale gen AI or data apps if you need to get something usable fast

ILLUSTRATIVE **NONEXHAUSTIVE**

Relative effort to use: High | Medium | Low

	Tools		
	Streamlit		plotly | Dash
	Streamlit	**Gradio**	**Dash (Plotly)**
Ease of use	Very simple web-style app for staff	Easy interface, best for demos	Less intuitive, designed more for data teams
Setup effort	Needs some developer support, but quick to set up	Minimal coding, very fast setup	Heavy build effort and more design work needed
Cost	*Cost figures and NFP discounts are highly variable and subject to change*		
Technical maturity required	Basic tech setup and light IT support	Very low, can run easily with minimal infrastructure	Higher IT capability needed for setup and maintenance
Flexibility	Balanced: can combine chat, reports, and data queries	Limited flexibility beyond prototypes	Very flexible dashboards and workflows, but more complex
Speed to launch	Quick to launch with some support (days)	Fastest to test and demo	Slower to launch, longer to refine

Source: Expert interviews

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Template workplan for your NFP

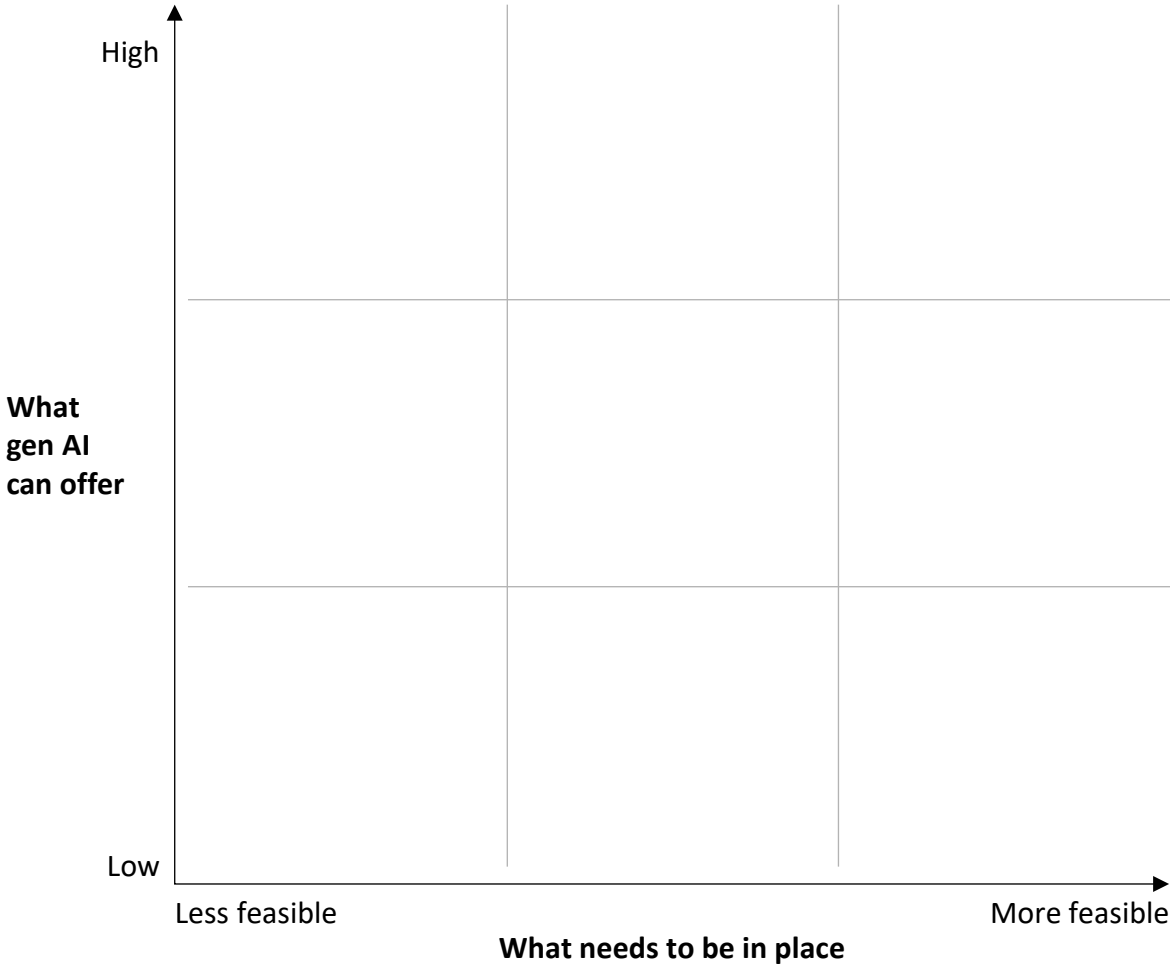
TEMPLATE

Gen AI pilot workplan

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Prioritisation matrix

TEMPLATE



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Map your current state

TEMPLATE

Pain point

Activity — xxxx

Current state

Phase	**xxx** (xxx)	**xxx** (xxx)	**xxx** (xxx)	**xxx** (xxx)	**xxx** (xxx)
Management	xxx				
Team member	xxx				
Pain points					
Data inputs and tools					

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Reimagine your future state with gen AI

TEMPLATE

Time saving due to gen AI

Best practice optimisation

★ Additional gen AI methodology details required

Activity — xxxx

Future state

Phase	xxx (xxx)	xxx (xxx)	xxx (xxx)	xxx (xxx)	xxx (xxx)
Management	xxx				
Team member	xxx				
Pain points					
Data inputs and tools					

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Risk matrix exercise

TEMPLATE

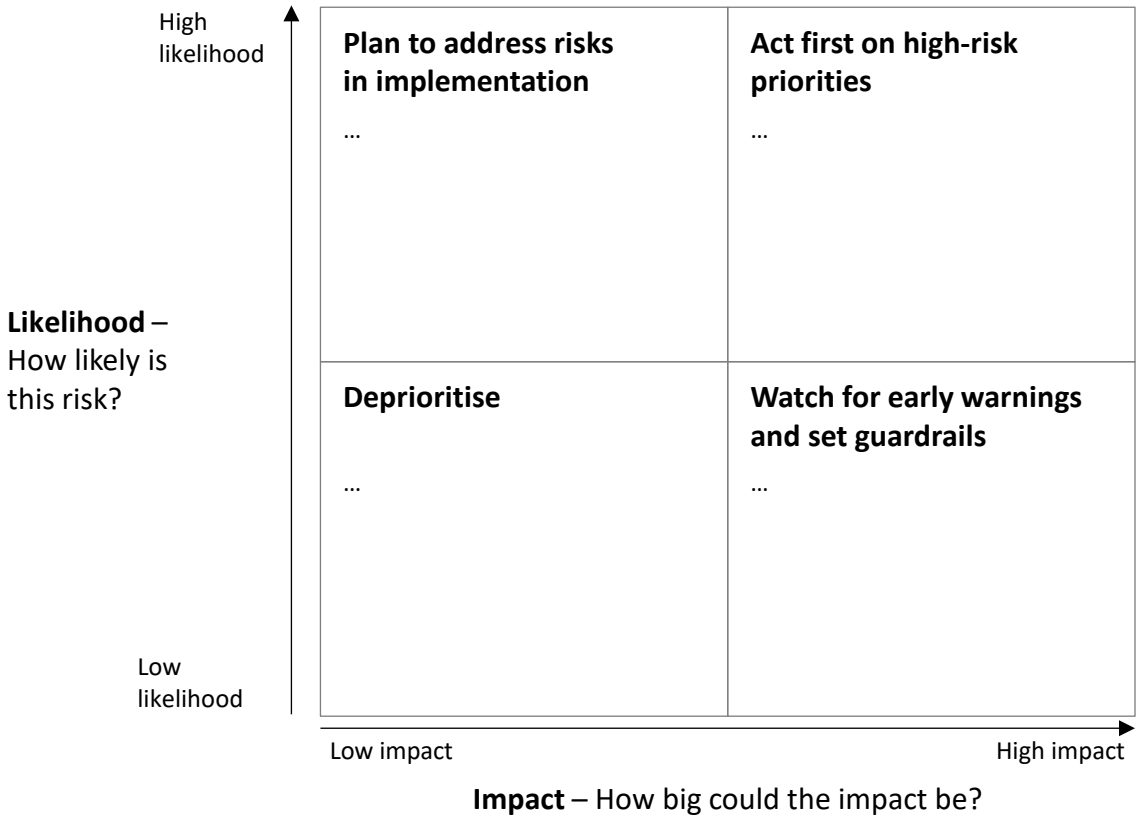
Step 1

What could stop us being successful?

1. …
2. …
3. …
4. …
5. …
6. …
7. …
8. …

Step 2

Use a risk matrix to map possible failures



Likelihood – How likely is this risk?

Impact – How big could the impact be?

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Risk mitigation template

TEMPLATE

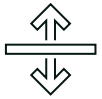
Risk category	Risks	Mitigation
Act first on high-risk priorities	...	...
Plan to address risks in implementation	...	...
Watch for early warnings	...	...

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Document measures of success

TEMPLATE








Goal	Metric	Baseline	Target	Who tracks it	Notes
…	…	…	…	…	…
…	…	…	…	…	…
…	…	…	…	…	…
…	…	…	…	…	…

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Skills mapping

TEMPLATE

Skill area	Current confidence (low/medium/high)	Why it matters	Support needed
…	…	…	…
…	…	…	…
…	…	…	…

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Training plan for staff using the new workflow

TEMPLATE

	Week 1: ...	Week 2: ...	Week 3: ...
Focus	...	...	...
Indicative agenda	...	...	...
Outcome	...	...	...

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Best practice guide

TEMPLATE

Best practices for [insert workflow name]



Use case ...



Prompt formula ...



Example prompt ...



Tips and tricks ...



Risks and guardrails ...

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Defining clear roles and responsibilities

TEMPLATE

Role	Name	Responsibilities
…	…	…
…	…	…
…	…	…

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Tracking measures of success throughout pilot

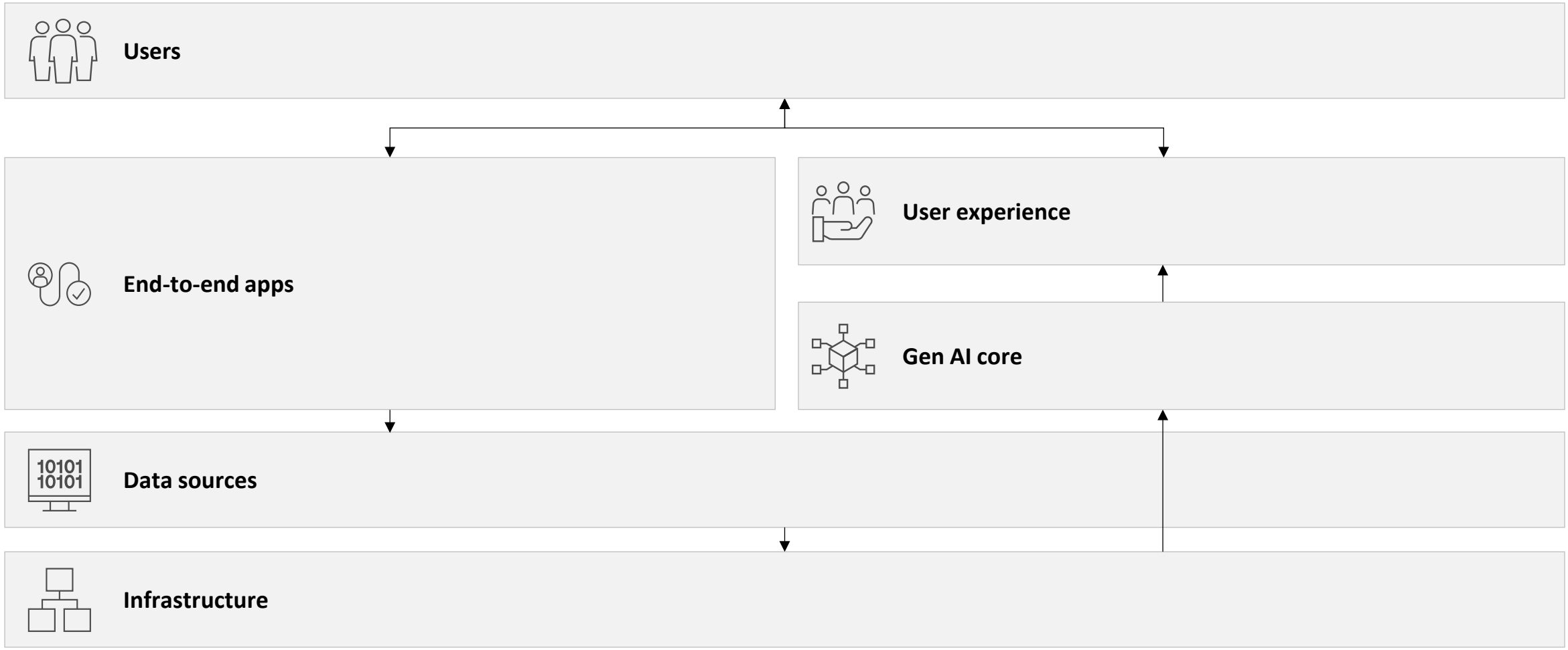
TEMPLATE

 Goal	 Metric	 Baseline	 Target	 xxx	 xxx
...	...	...	...	...	...
...	...	...	...	...	...
...	...	...	...	...	...
...	...	...	...	...	...

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List gen AI-enabling tools being used in your organisation

TEMPLATE



True as of December 2025

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Decisions to achieve MVP of a reimagined domain

TEMPLATE

Required investment (cost/time): High Medium Low

Layer	Recommended shift	Effort to achieve MVP	Factors for discussion
User experience	...	...	...
Gen AI core	...	...	...
Data sources	...	...	...
Infrastructure	...	...	...

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Strategy table

TEMPLATE

Ingoing hypothesis
Final decision

Layer	Decision	Choices			
User experience	i ...	...	...	...	...
Gen AI core	ii ...	...	...	...	...
Data sources	iii ...	...	...	...	...
Infrastructure	iv ...	...	...	...	...

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Scorecard to rate gen AI tools

TEMPLATE

Relative strength: Low | Medium | High

	Gen AI tool		
	xxx	xxx	xxx
Ease of use	xxx	xxx	xxx
Setup effort	xxx	xxx	xxx
Cost	xxx	xxx	xxx
Technical maturity required	xxx	xxx	xxx
Flexibility	xxx	xxx	xxx
Speed to launch	xxx	xxx	xxx

Source: Expert interviews

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Influence Model

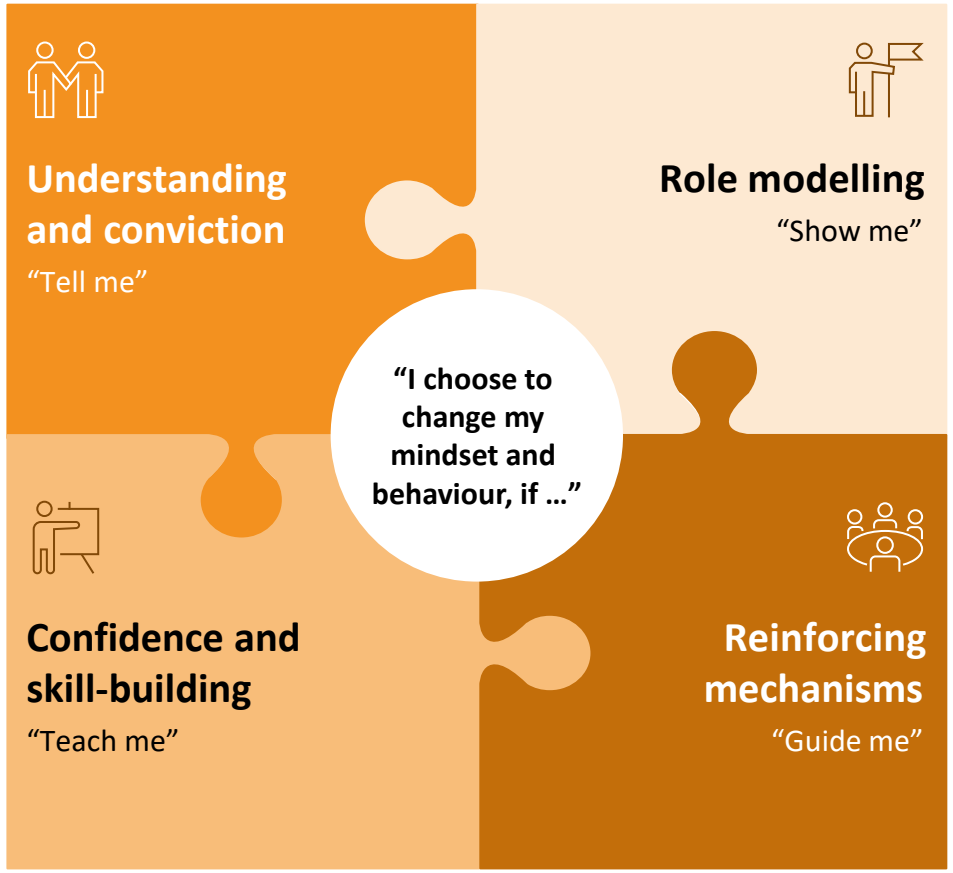
TEMPLATE

"... I understand why we need to change, and I meaningfully link it with my sense of purpose"

- ...

"... I take ownership of my development and eagerly take part in specific trainings and tools to do my job better"

- ...



"... I see leaders role modelling the new behaviour and I feel part of a change community"

- ...

"... I see that our structures, processes and systems will give me autonomy, support me and reward me"

- ...

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Gen AI communications plan for smaller NFPs

Let's map out how to talk about the pilot workflow over the next six months – what forums to use, how often, and what messages to share

TEMPLATE

	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
All-staff touchpoints	...	...	...	...	...	...
Gen AI updates	...	...	...	...	...	...
Mini-training/ demos	...	...	...	...	...	...
Feedback loops	...	...	...	...	...	...

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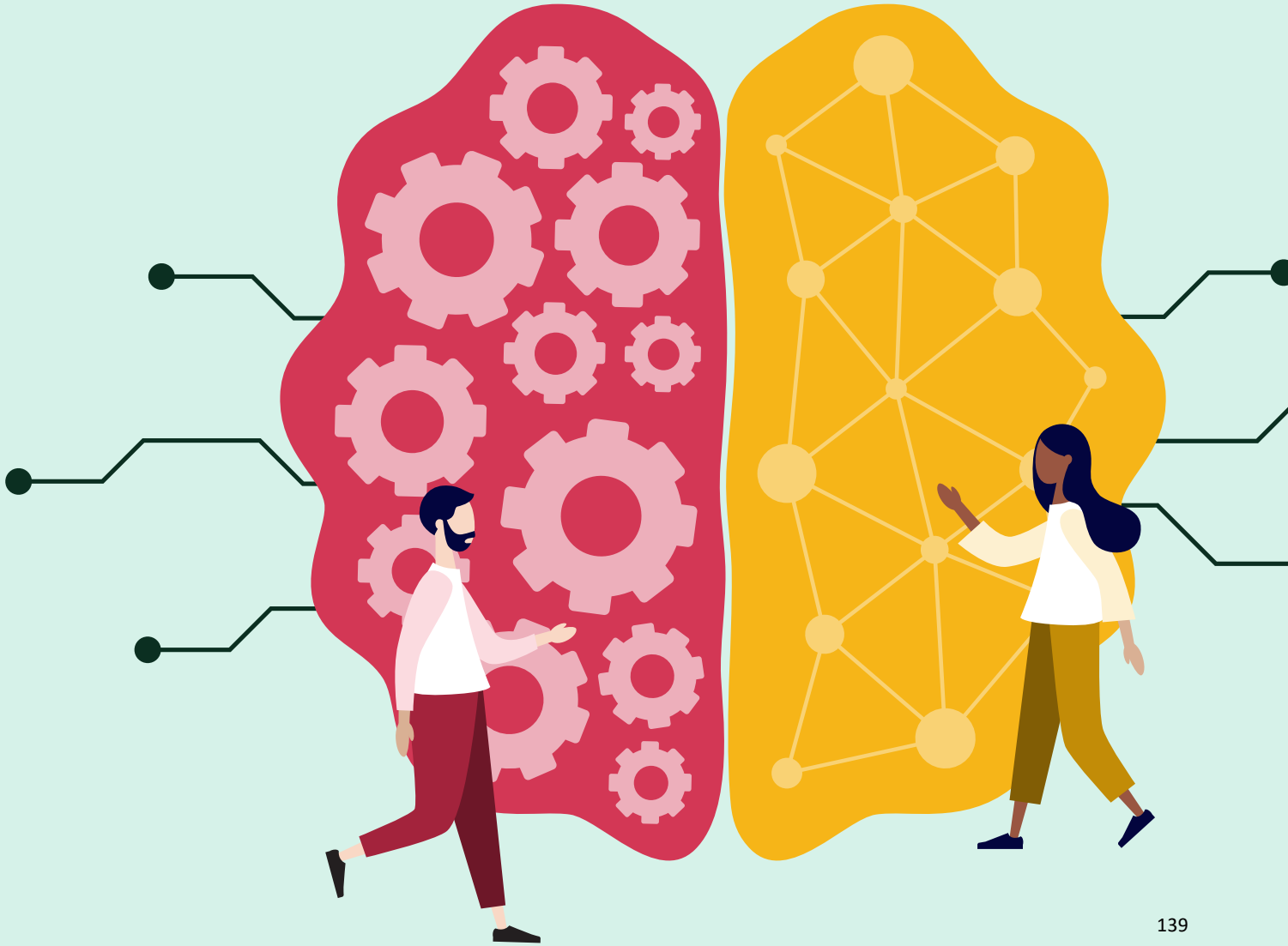
Gen AI communications plan

Let's map out how to talk about the pilot workflow over the next six months – what forums to use, how often, and what messages to share

TEMPLATE

	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6
All-staff town halls	...	...	...	...	...	...
Gen AI email updates	...	...	...	...	...	...
Dedicated training	...	...	...	...	...	...
Feedback forums	...	...	...	...	...	...

Thank you.



True as of December 2025