

Design Exercise!

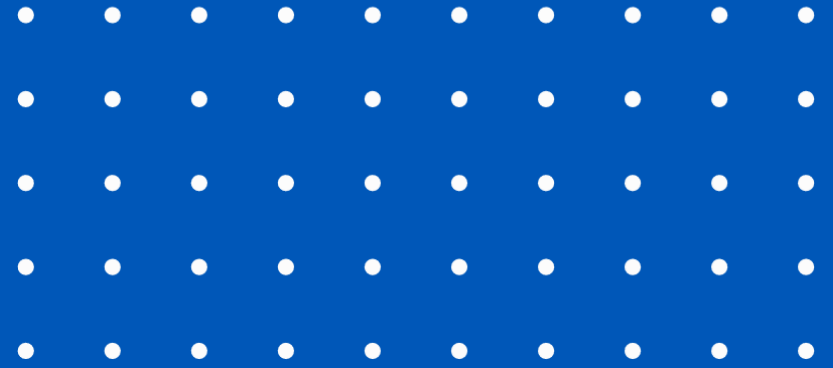
AI & Automation Ideation

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





What are agents?
What do you need to build?
How do you think about their value?

Agenda

Raise your hand if your
organization...

**...is not actively using
generative AI.**

Raise your hand if your
organization...

**...uses tools like Copilot,
ChatGPT, or Gemini.**

Raise your hand if your
organization...

**...pays for tools like Copilot,
ChatGPT, or Gemini.**

Raise your hand if your
organization...

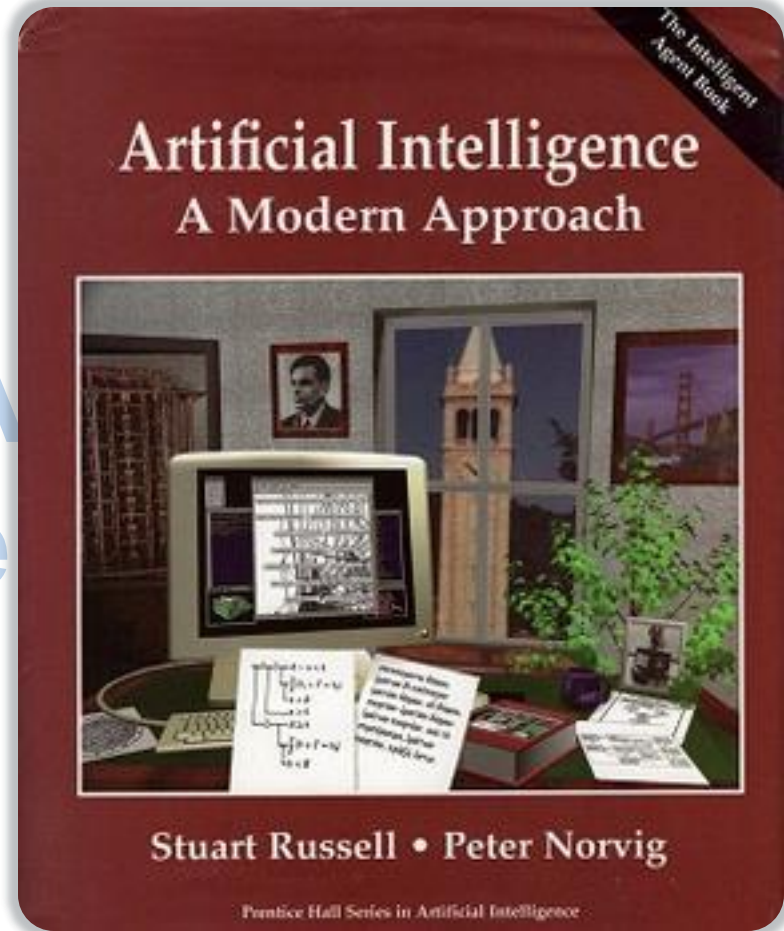
**...have built AI solutions into
your organization's work.**

What are agents?

**Anything that perceives its
environment and acts on it**

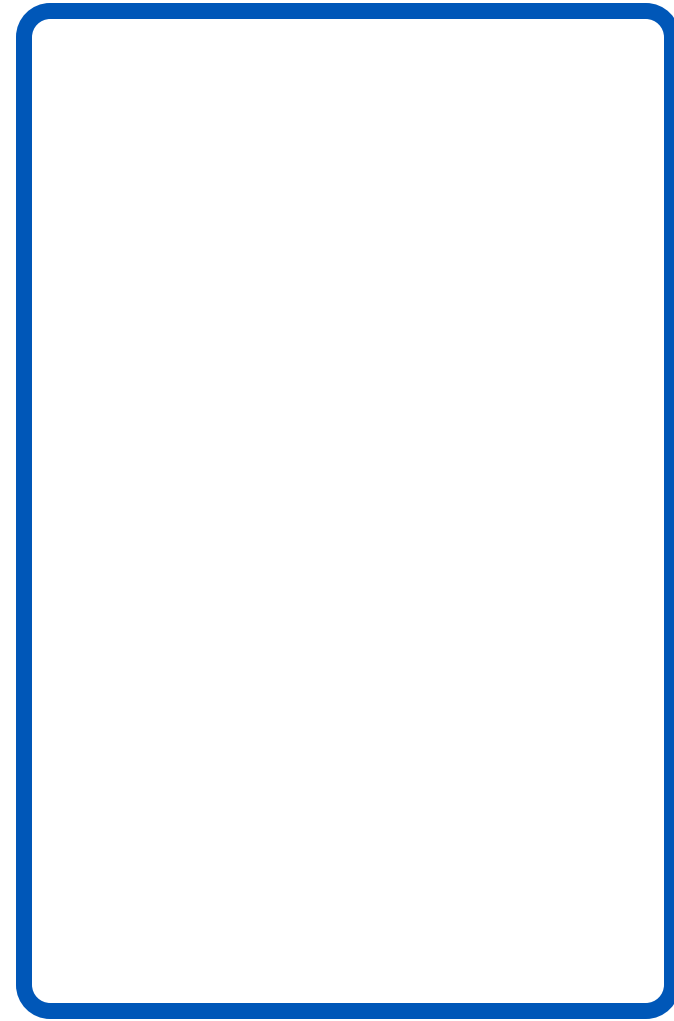
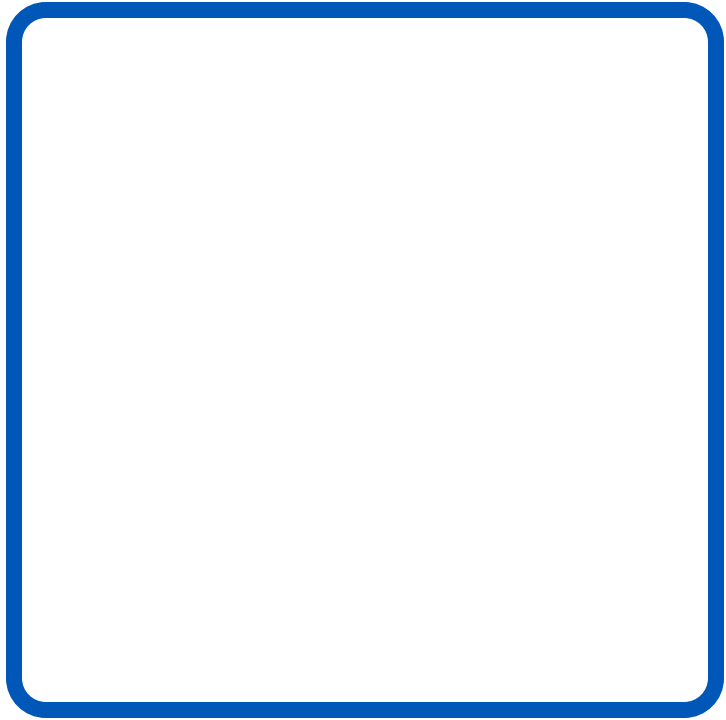
**You have a specialized task that
you want to use generative AI to
solve repeatedly.**

A
e



1995!

perceives its
and acts on it



Agents

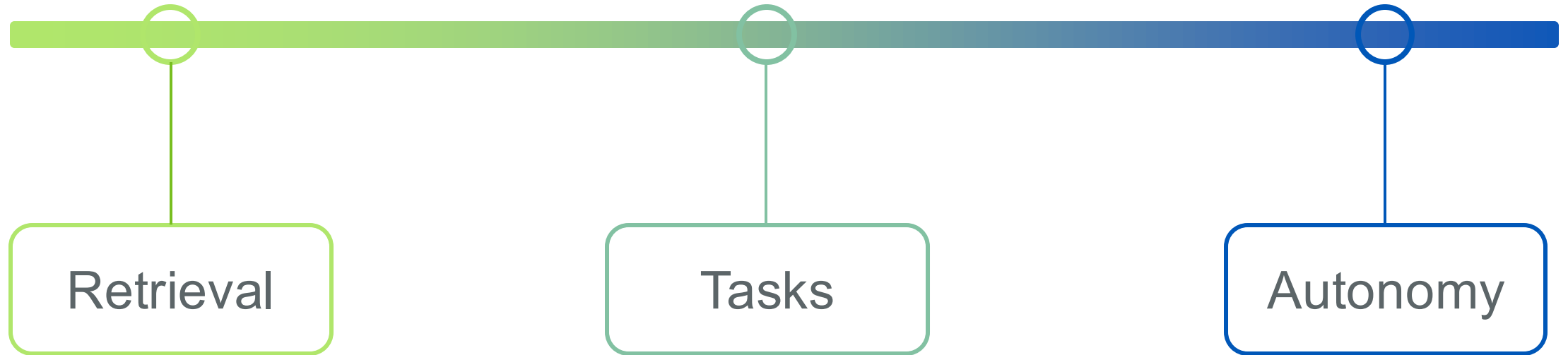
Automation

Non-
deterministic

Deterministic

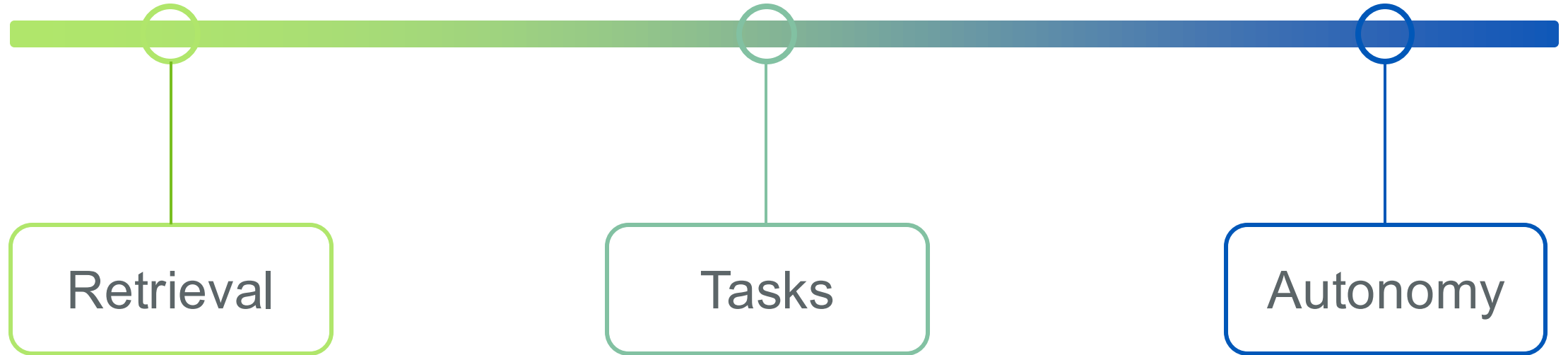
Simple

Advanced



Simple

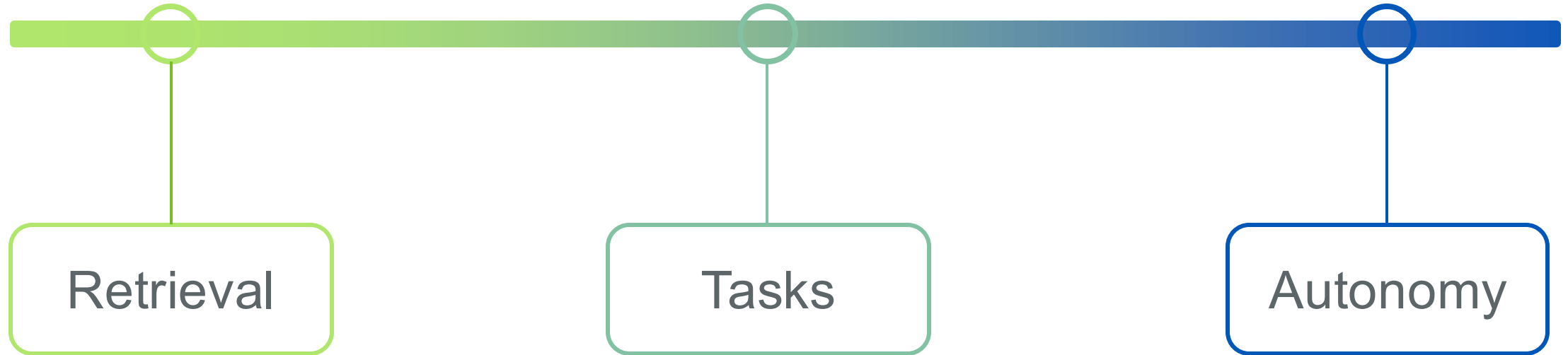
Advanced



Build a chatbot that is aware of donor information and can answer questions for team members

Simple

Advanced

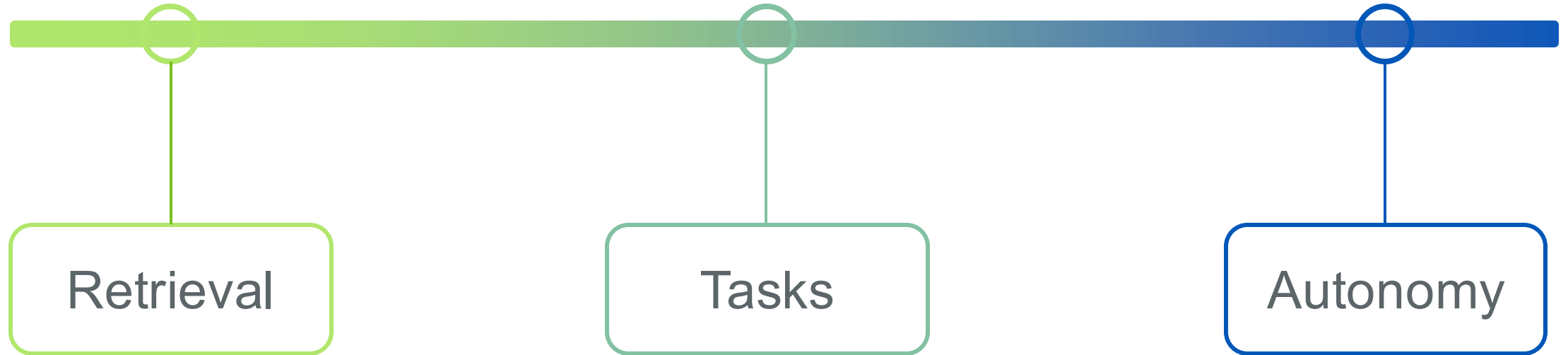


Build a chatbot that is aware of donor information and can answer questions for team members

Automate the generation of donor thank you letters based upon their most recent donation and referencing how they've engaged with the organization

Simple

Advanced



Build a chatbot that is aware of donor information and can answer questions for team members

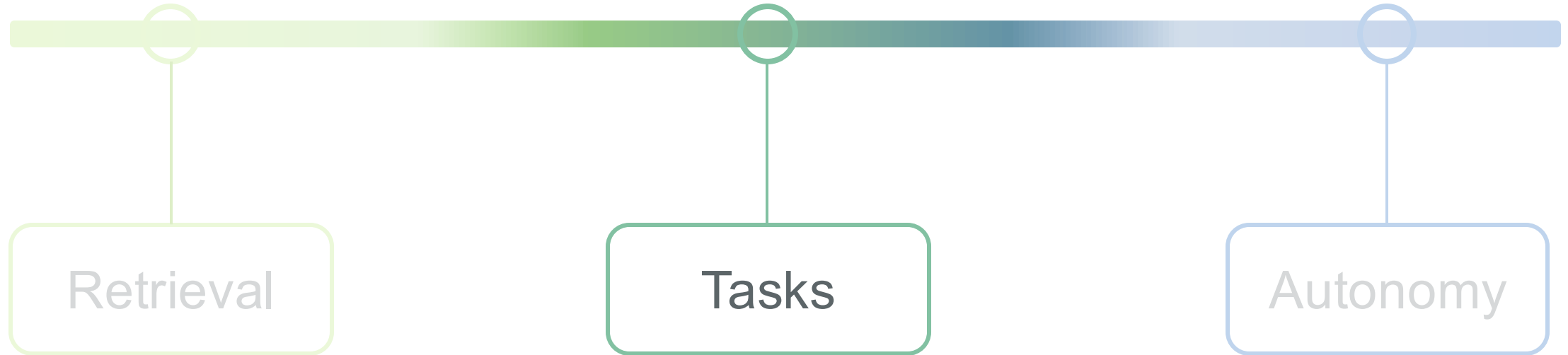
Automate the generation of donor thank you letters based upon their most recent donation and referencing how they've engaged with the organization

Identify and engage with lapsed donors in order to re-engage them via personalized outreach

What are the components of an agent?

Simple

Advanced



Build a chatbot that is aware of donor information and can answer questions for team members

Automate the generation of donor thank you letters based upon their most recent donation and referencing how they've engaged with the organization

Identify and engage with lapsed donors in order to re-engage them via personalized outreach

Large Language Model



Environment



Trigger

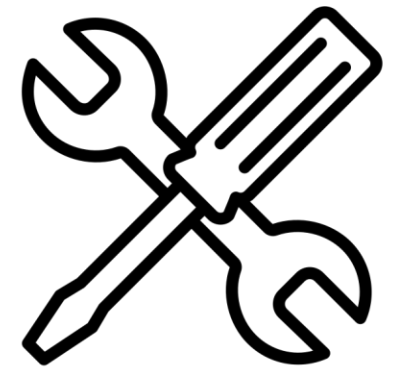


Data



Supervisor





Tools



How have we done this?

Nonprofit PolicyBuilder

Welcome to the Computer Use Policy Digital Workbook

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



WE FOCUS ON FOUR KEY AREAS

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



Acceptable Use

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



Bring Your Own Device

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



Data Security

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

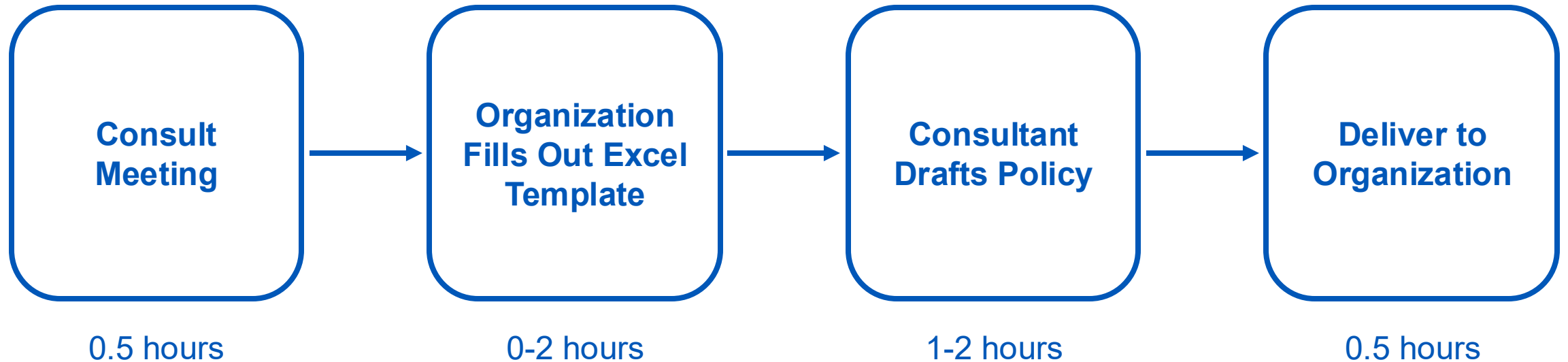


Artificial Intelligence

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

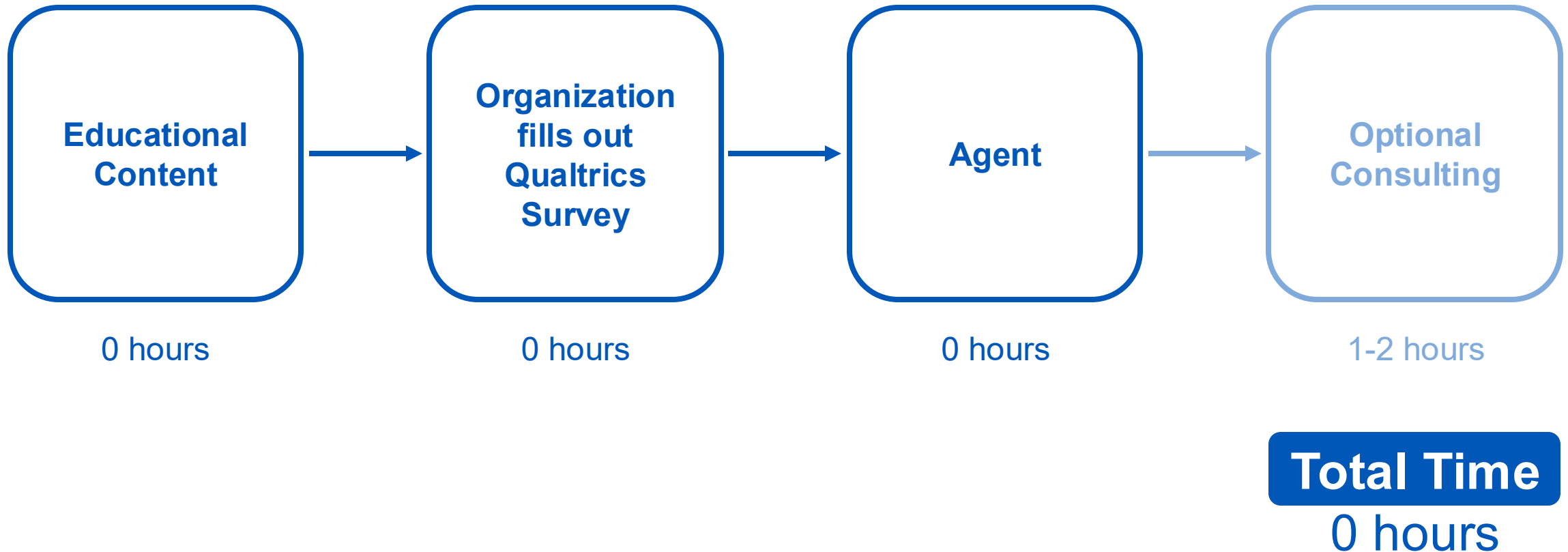


Before Agents



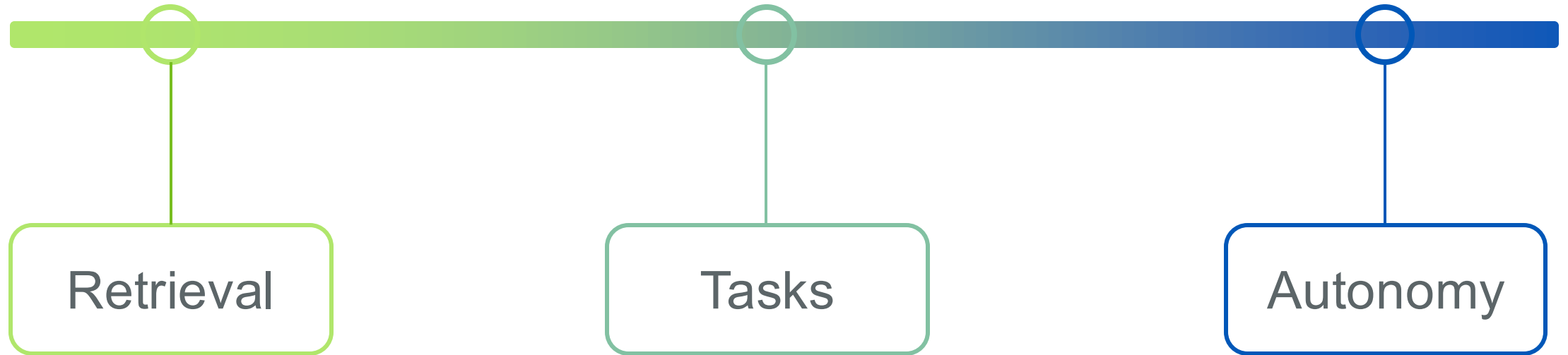
Total Time
2-5 hours

After Agents



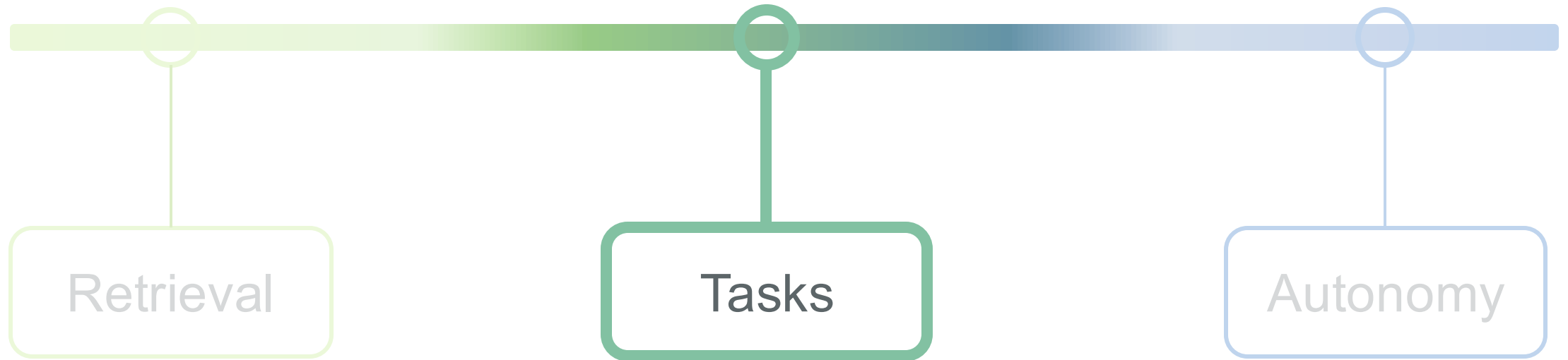
Simple

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Simple

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Use it for free:

techimpact.org/policybuilder

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

**How can you do this in your
organization?**

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

1

Identify opportunities

2

Map logic & requirements

3

Prioritize

4

Build & iterate



Identify opportunities

What are tasks that you or your team performs regularly?

List at least three opportunities on your own.

1 Identify opportunities

For each opportunity:

1. What current level of effort does this require?
2. By saving this level of effort, what additional value would this allow you to create?



Identify opportunities

Share opportunities in groups.

Look for areas of inspiration.

Are there additional opportunities that emerge?



Identify opportunities

Consider which of the opportunities you listed are most valuable for your organization.

Pick one.



Map logic & requirements

Pick one opportunity to start with.

Think about how you would explain to a new hire or an intern how to do that work.

You're going to map that logic out.

2

Map logic & requirements

Start by mapping out the logic of the current state.

Tools to help you:

- Vibe Boards (app.vibe.us)
- Miro Boards (miro.com)
- PowerPoint / Slides
- Pen & Paper



Map logic & requirements

Now focus on reimagining it by using an agentic workflow.

How would this change if you could take humans out of the loop (or dramatically minimize their involvement)?

2

Map logic & requirements

1. What triggers this workflow happening?
2. Is there additional information to reference to guide decisions?
3. What are the decision points to consider?
4. What is the end product that should be produced?
5. Are there places where a supervisor should give feedback?

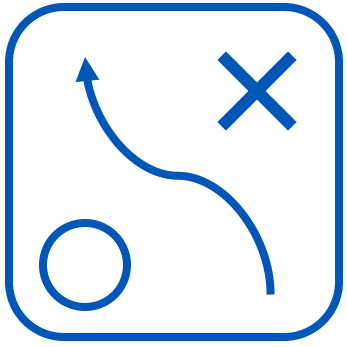


Map logic & requirements

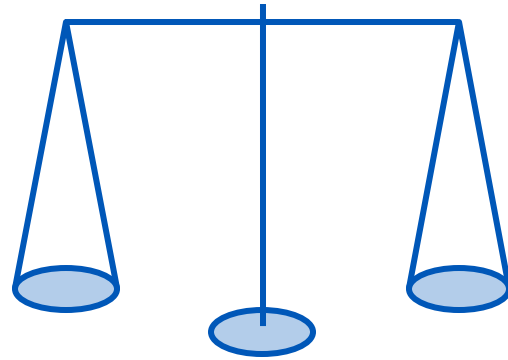
Be prepared to share this with your “table”.

Do any of the ideas of your peers spark changes in how you might think about your own work? Adjust accordingly.

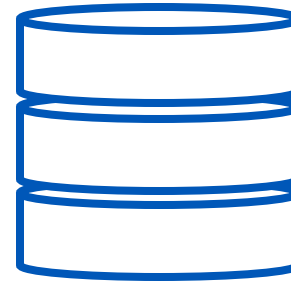
**Have you implemented what you need
to in order to effectively use AI?**



Vision & Strategy



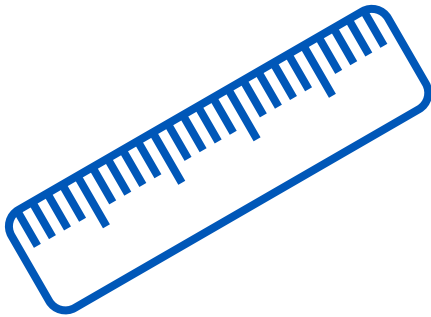
Governance & Ethics



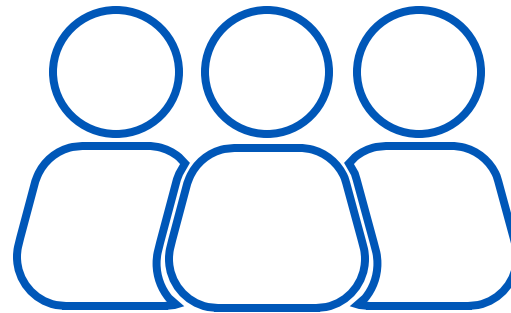
Data & Infrastructure



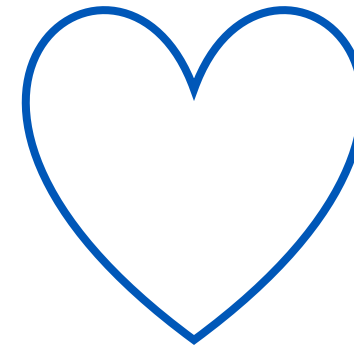
Skills & Capabilities



**Measurement &
Evaluation**



**Culture &
Transparency**



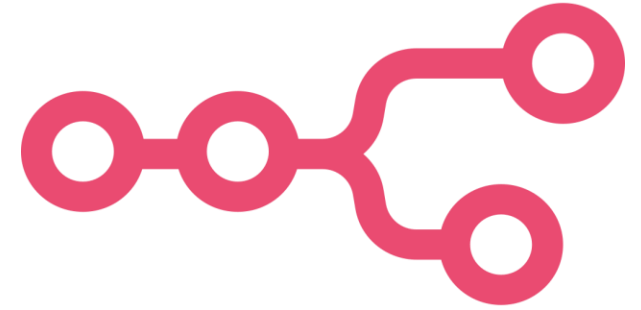
**External &
Sustainable Support**

Find the AI Readiness Domains here:



[bit.ly/
ai-readiness-domains](https://bit.ly/ai-readiness-domains)

What do you need to build these tools?





Deploy ⋮

Welcome to the Nonprofit Prompt Assistant

This prototype app helps nonprofit professionals streamline their work using AI-generated prompts.

✓ Choose a task category

The categories are designed specifically for nonprofit operations, fundraising, and program management.

✓ Fill in standard information

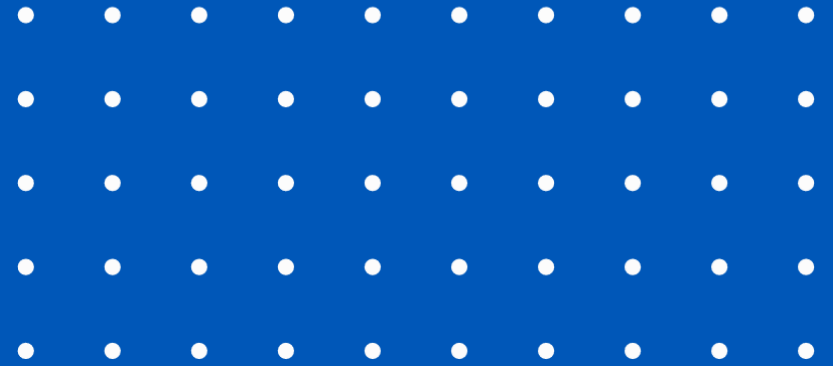
This information will be used to customize the prompts to your organization's context.

✓ Get a customized prompt instantly

You can copy the prompt to your clipboard and use it immediately.

At the end, we'd love your feedback and email so we can keep improving!

[Start Using the Assistant](#)



Design Exercise!

AI & Automation Ideation

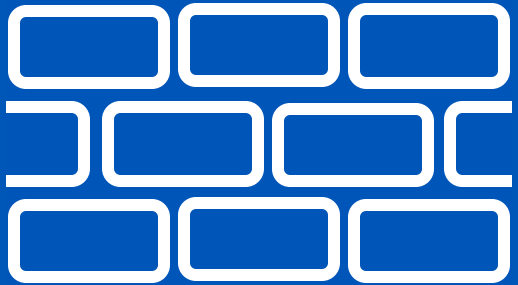
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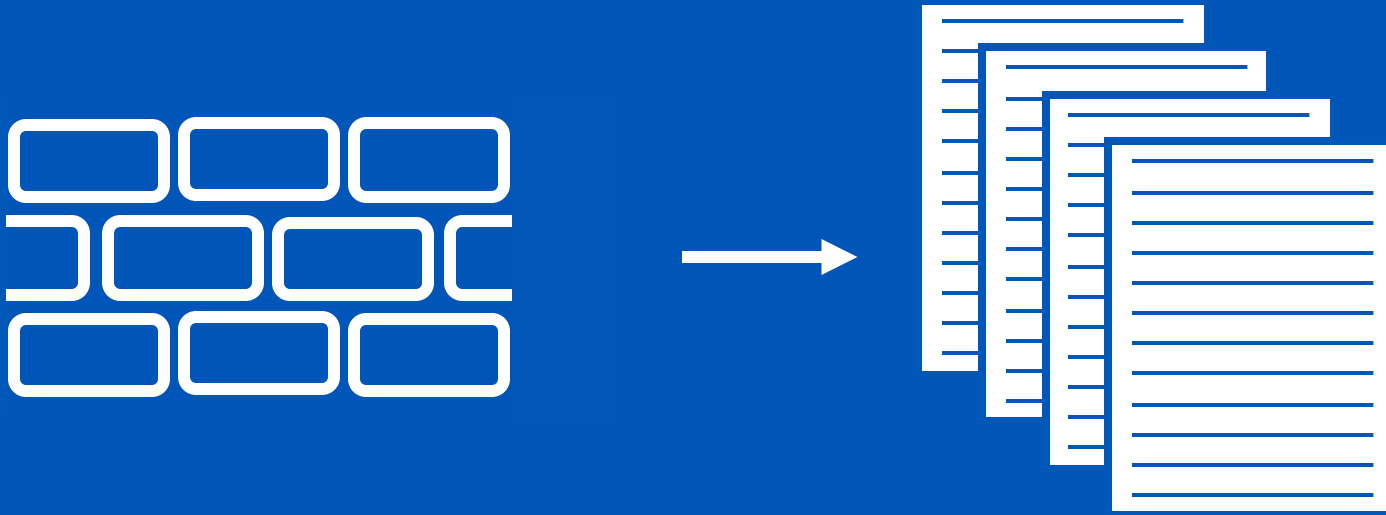
Problem: We have language specific to our domain that generative AI does not understand.

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

Solution: Finetuning



Solution: Finetuning



Solution: Finetuning

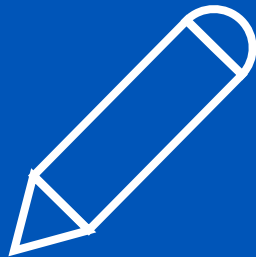


What is *generative* AI?

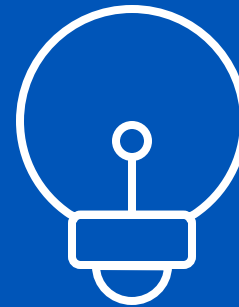
Key components



Internet Scale
Data



Content
Creation



Variability &
Creativity



Various
Modalities

Use it to...

write a first draft

refine language

summarize

ideate

extract or classify data

automate communication

localize content

generate code

augment your work

...and many, many more

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

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

Foundation Models

GPT 3.5

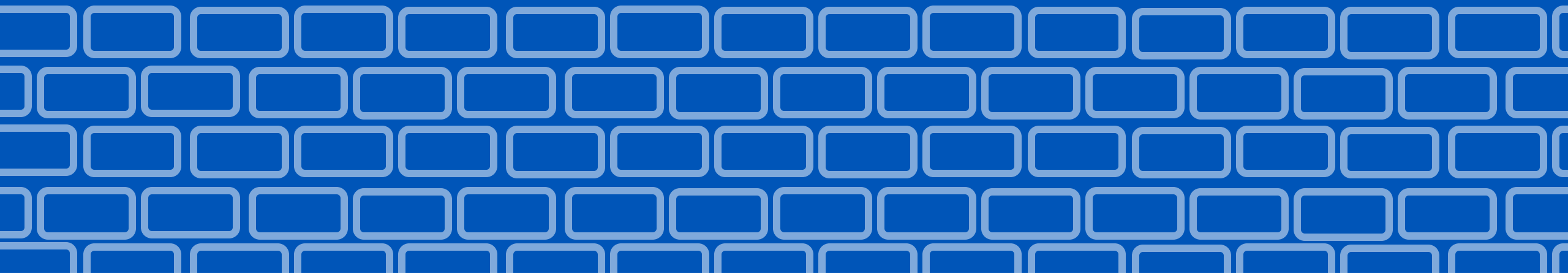
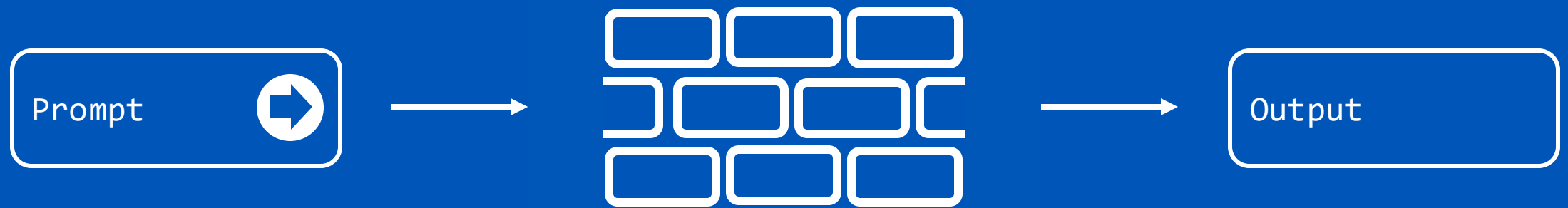
GPT 4.0

GPT 3.5



GPT 4.0

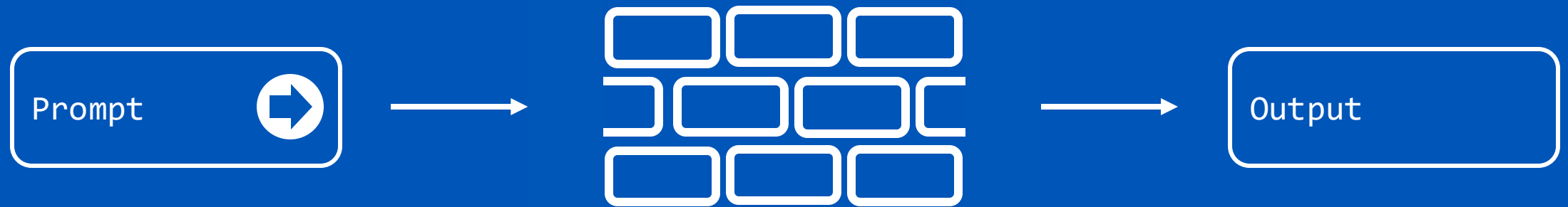




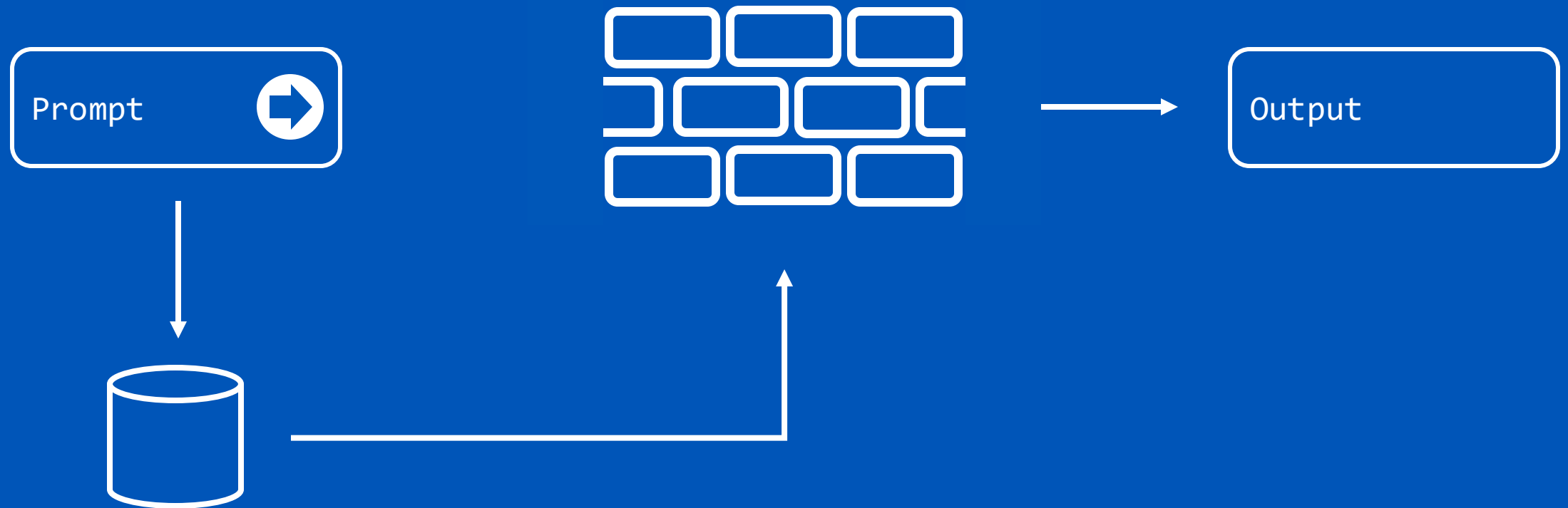
Solution: RAG Models

Retrieval Augmented Generation

Solution: RAG Models



Solution: RAG Models



What is artificial intelligence?

Machine Learning

Robotics

Expert Systems

Vision

Planning

Speech

**Natural Language
Processing**

Machine Learning

Robotics

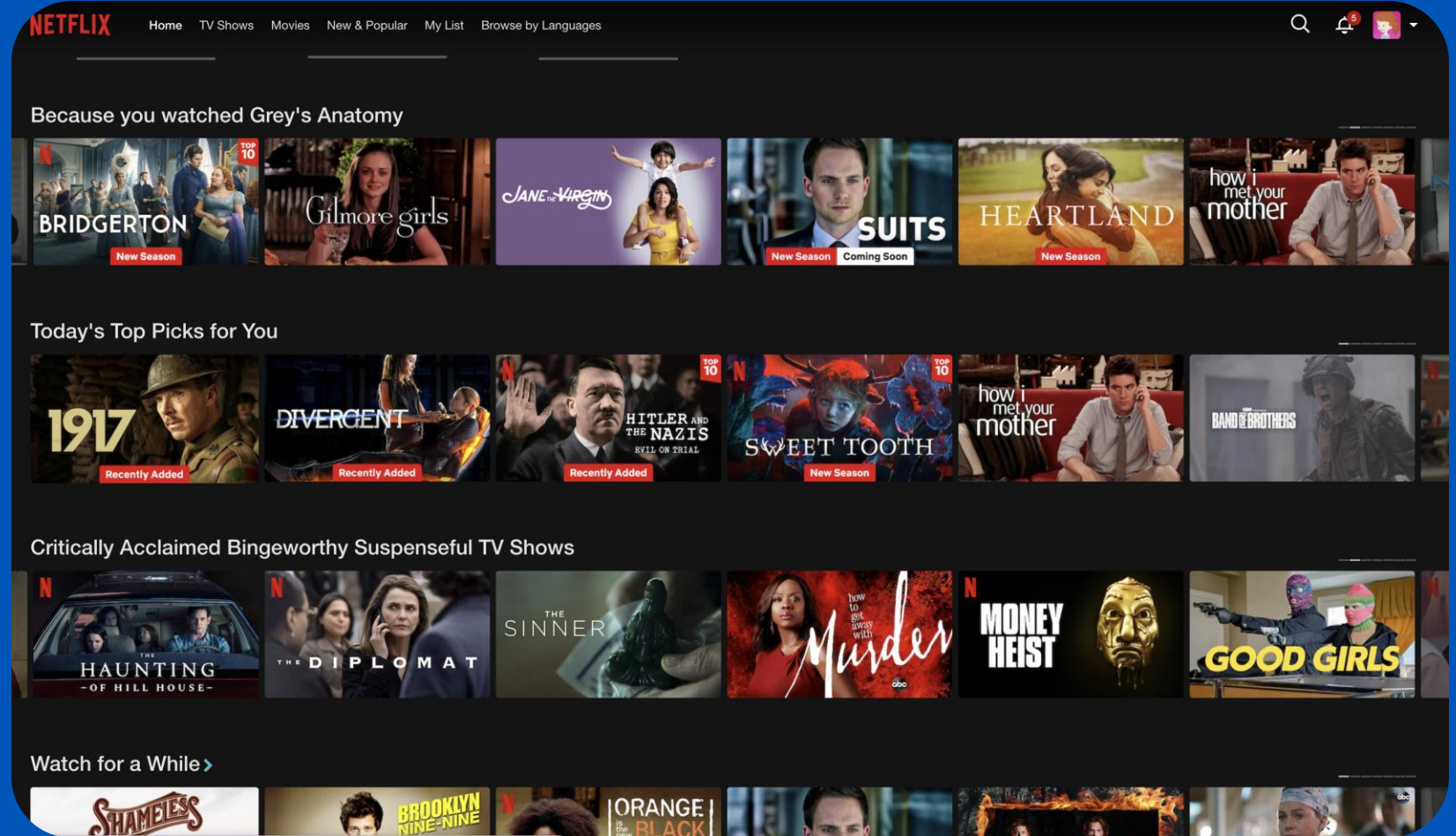
Expert Systems

Vision

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Natural Language Processing



Robotics

Expert Systems

Vision

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Machine Learning

Robotics

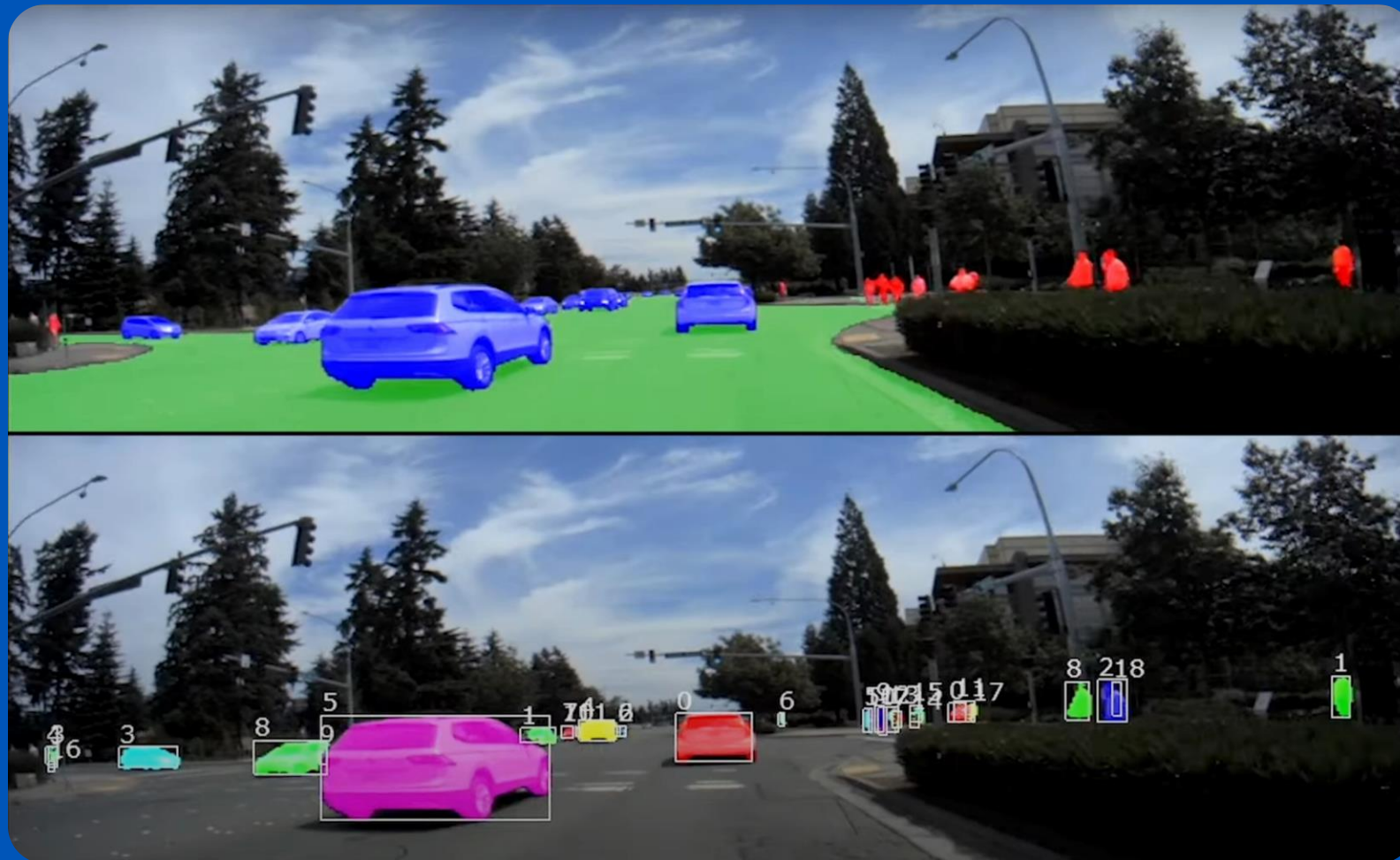
Expert Systems

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Machine Learning

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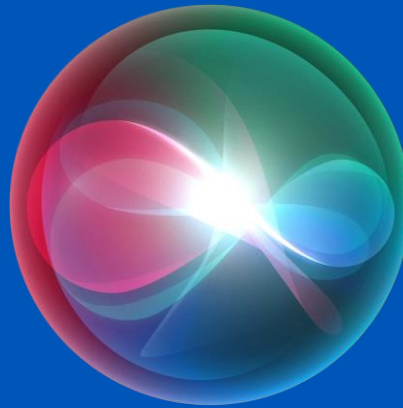
Expert Systems

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Machine Learning

Robotics

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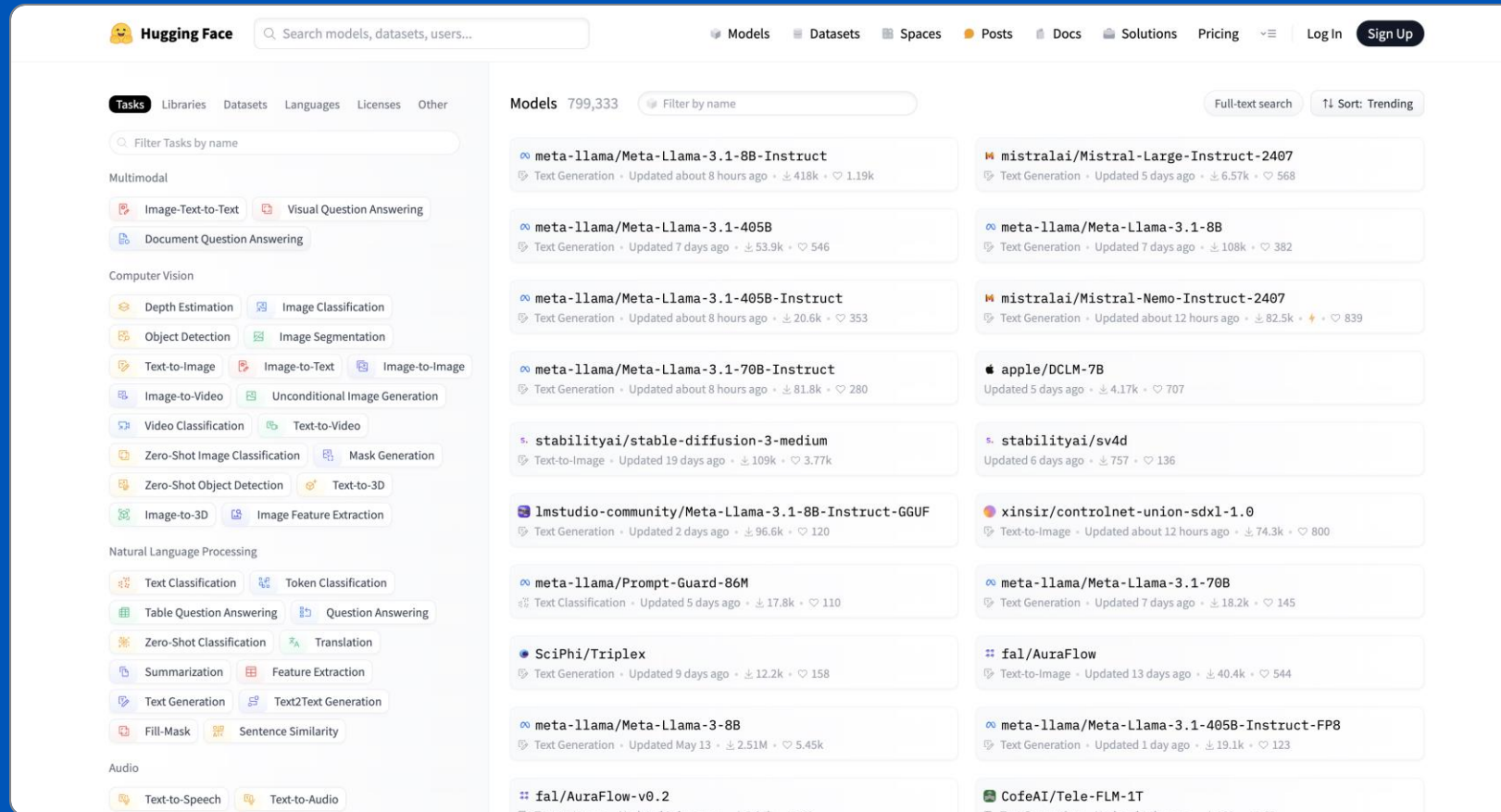


Problem: We need to keep our data secure while using generative AI.

Solution: Paid Tools



Solution: Self-Hosting





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

Large *Language* Model

≠

Large *Knowledge* Model

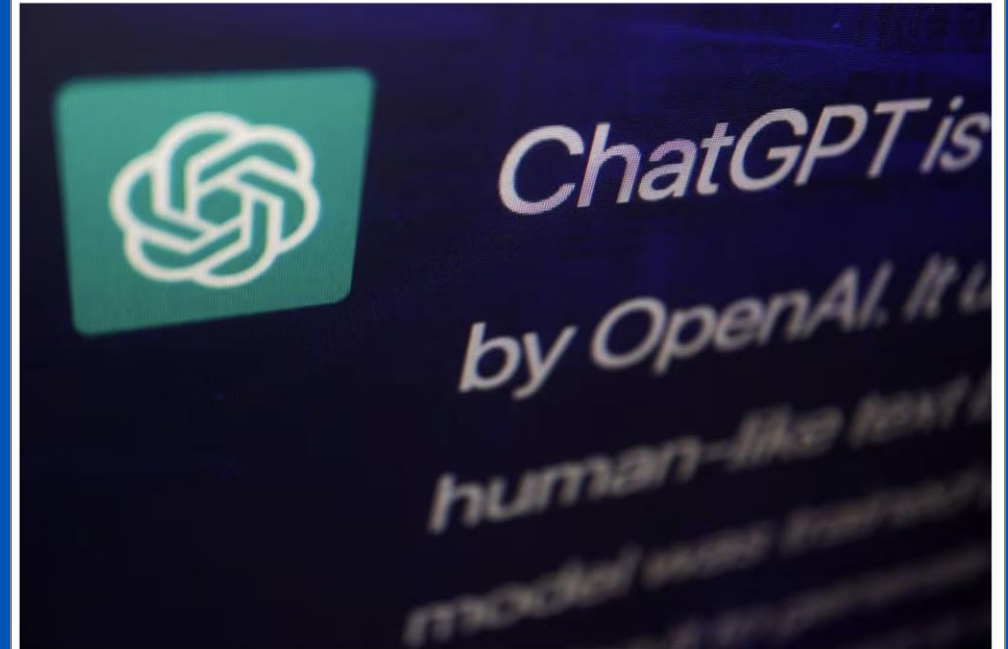
Hallucinations

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

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

By Sara Merken

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



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

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

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

Solution: Free, Off-the-Shelf Tools



Solution: Prompt Engineering

Include Details

Adopt a Persona

Use Delimiters

Specify Output Length

Specify Steps

Provide Examples

Solution: Prompt Engineering

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Provide Examples

Before:

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

Solution: Prompt Engineering

Include Details

Adopt a Persona

Use Delimiters

Specify Output Length

Specify Steps

Provide Examples

Before:

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

After:

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

Solution: Prompt Engineering

Include Details

Adopt a Persona

Use Delimiters

Specify Output Length

Specify Steps

Provide Examples

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