

Activating AI:

Readiness, Risk and Real-World Action

ACTIVITY WORKBOOK

Dot Good.

September 10, 2025

Learning Objectives | Today's Session

- 1 Understand your organization's AI adoption readiness and digital maturity
- 2 Identify AI use cases that unlock value for your organization
- 3 Discuss common barriers to adoption and practical steps to get started, even in challenging or complex settings

#	Agenda	Overview
1	Overview: AI & Nonprofits: Understanding the Current State of the Landscape	<i>Understand the current state of AI and challenges and risks shaping the sector</i>
2	Exploring AI Maturity: Assessing Your Organization's Position	<i>Evaluate your organization's AI readiness using a rapid assessment</i>
3	Maximizing Impact: Where AI Can Create Value for Nonprofits	<i>Identify where AI can create immediate value for your organization</i>
4	Taking Action: Bridging Vision and Execution	<i>Strategize and prepare to action on an AI use case</i>

Notes

AI Readiness | Rapid Self-Assessment

#	Statement	Score	+
1	Technology Strategy: We have a formal, documented technology strategy in place, inclusive of AI, that guides how we invest in and deploy tools	<div> <div>5</div> <div>Official technology strategy exists with AI included</div> <div>3</div> <div>Technology strategy exists, but AI is not included</div> <div>1</div> <div>Official technology strategy does not exist</div> </div>	
2	Technology Leadership: Our organization has an executive leader who understands and is responsible for technology strategy and decisions	<div> <div>5</div> <div>Strongly Agree</div> <div>4</div> <div>Agree</div> <div>3</div> <div>Neutral</div> <div>2</div> <div>Disagree</div> <div>1</div> <div>Strongly Disagree</div> </div>	
3	AI Tools: Our organization's use of AI tools in operations and / or programs is done in a consistent and integrated way	<div> <div>5</div> <div>Strongly Agree</div> <div>4</div> <div>Agree</div> <div>3</div> <div>Neutral</div> <div>2</div> <div>Disagree</div> <div>1</div> <div>Strongly Disagree</div> </div>	
4	Vision: Our leadership and organization sees technology, including AI, as a key asset to help us achieve our mission and deepen our impact	<div> <div>5</div> <div>Strongly Agree</div> <div>4</div> <div>Agree</div> <div>3</div> <div>Neutral</div> <div>2</div> <div>Disagree</div> <div>1</div> <div>Strongly Disagree</div> </div>	
5	Governance: When new technology is introduced, our organization has policies and processes to make sure ethical, legal, and privacy considerations are met	<div> <div>5</div> <div>Strongly Agree</div> <div>4</div> <div>Agree</div> <div>3</div> <div>Neutral</div> <div>2</div> <div>Disagree</div> <div>1</div> <div>Strongly Disagree</div> </div>	
6	Innovation: With leadership support, our organization actively pilots new technologies to see how they enable organizational objectives	<div> <div>5</div> <div>Strongly Agree</div> <div>4</div> <div>Agree</div> <div>3</div> <div>Neutral</div> <div>2</div> <div>Disagree</div> <div>1</div> <div>Strongly Disagree</div> </div>	
7	Change Management: Our team has been successful at embracing organizational change (e.g., process redesign, role and responsibility changes, etc.) to support digital adoption	<div> <div>5</div> <div>Strongly Agree</div> <div>4</div> <div>Agree</div> <div>3</div> <div>Neutral</div> <div>2</div> <div>Disagree</div> <div>1</div> <div>Strongly Disagree</div> </div>	
8	Technology Investment: Our organization has a dedicated budget line for technology / data (inclusive of AI) or a fund that supports strategic upgrades / pilots	<div> <div>5</div> <div>Yes</div> <div>1</div> <div>No</div> </div>	
9	Digital Execution: In the past 3 years, our organization successfully completed a technical project, from idea to execution (e.g., implementing a new enterprise-wide software, etc.)	<div> <div>5</div> <div>Yes</div> <div>1</div> <div>No</div> </div>	
10	Technology Enablement: Our organization has a defined process for allocating funds across different technology needs (e.g., hardware, software, training, etc.)	<div> <div>5</div> <div>Yes</div> <div>1</div> <div>No</div> </div>	
Total:			

Activity | AI Use Case Activation

Section A: Use Case Development. Please answer the below questions.

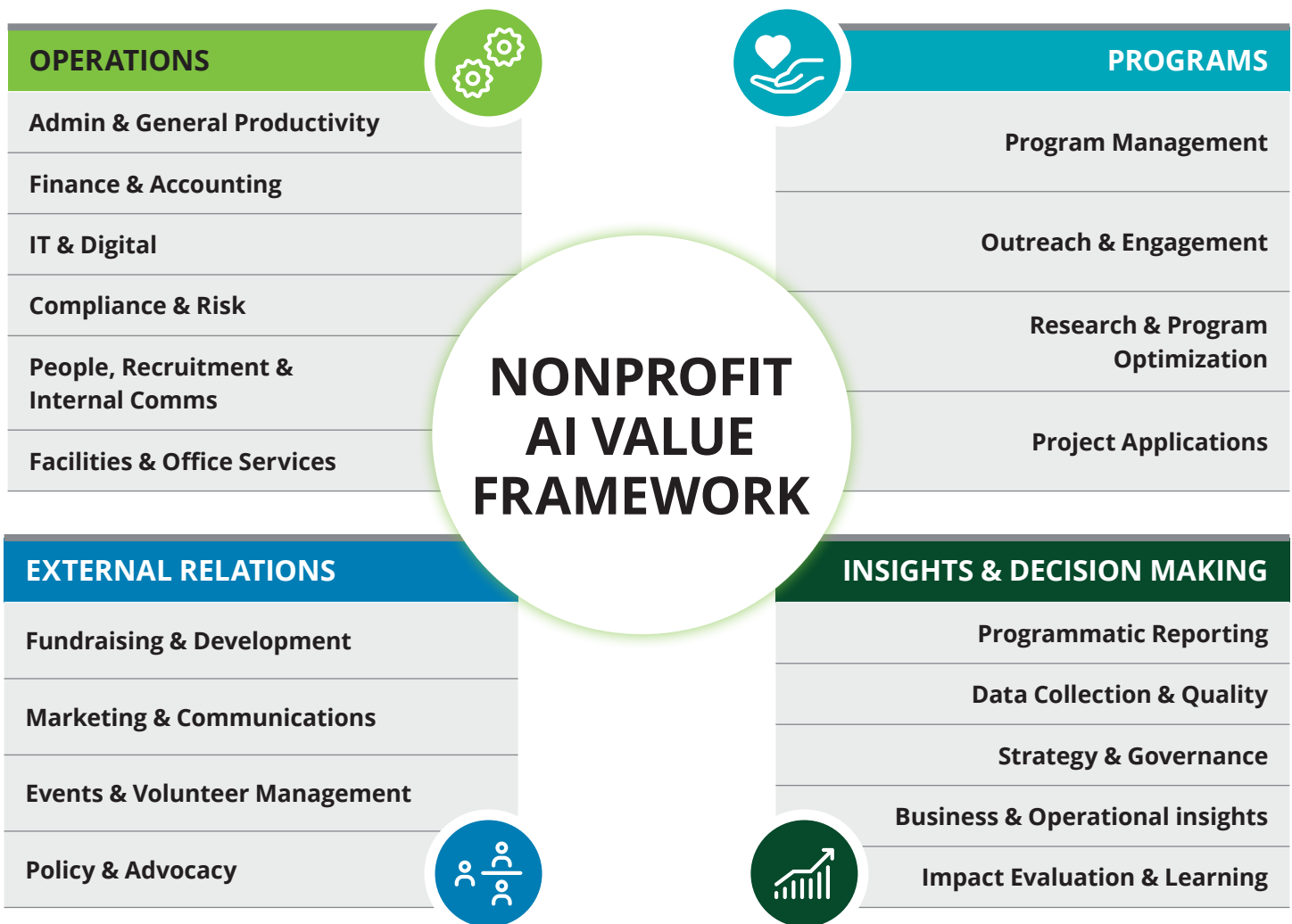
- 1. Drawing inspiration from the examples, brainstorm one AI use case idea that would create immediate value for your organization.
- 2. Why did you select this use case?
- 3. How will the use case create value for your organization?

Section B: Identifying Challenges. Please answer the below questions.


- 1. Brainstorm 2-3 challenges or barriers you anticipate in activating your proposed use case.
- 2. How might you overcome or mitigate the barrier?

Nonprofit AI Value Framework | Overview


The Nonprofit AI Value Framework categorizes the different areas of impact within an organization where AI can drive efficiencies and unlock capabilities and insights




Nonprofit AI Value Framework | Potential Use Cases

	OPERATIONS
Admin & General Productivity	<ul style="list-style-type: none"> Draft and polish documents, emails, slides, and more Transcribe notes, summarize notes, and document specific tasks and actions Chat with internal bot to obtain answers to common questions/FAQs about policies Prompt a knowledge management agent to synthesize internal org info and docs
Finance & Accounting	<ul style="list-style-type: none"> Auto-capture and categorize transactions Predict cash-flow and forecast budgets Flag continuous anomaly and fraud alerts on spend
IT & Digital	<ul style="list-style-type: none"> Resolve help desk tickets with chatbots Monitor cybersecurity with agents tracking endpoints and email threats Leverage no-code agentic systems (e.g., natural lang.) to develop / configure software
Compliance & Risk	<ul style="list-style-type: none"> Review contractual obligations and propose red-lines with AI Monitor real-time regulatory and reputational risk Detect spend patterns and restricted fund misuse
People, Recruitment & Internal Comms	<ul style="list-style-type: none"> Screen AI-ranked candidate sourcing and bias-aware resume screening Automate engagement nudges and turnover-risk analytics from pulse data Query self-service HR chatbots to answer policy and workflow asks
Facilities & Office Services	<ul style="list-style-type: none"> Predict and propose energy usage modifications with smart HVAC/lighting Optimize routes and fleets for deliveries and field visits Predict maintenance schedules of vehicles and equipment

	EXTERNAL RELATIONS
Fundraising & Development	<ul style="list-style-type: none"> Identify (e.g., via press release) and prioritize potential donors for outreach Generate outreach emails with high personalization for potential donors Boost retention through “next-best-touch” strategies to prevent lapses
Marketing & Communications	<ul style="list-style-type: none"> Generate studio multi-channel copy, images, and video distributions Segment audiences and optimize send-time Track and listen to social / media sentiments with issue alerts
Events & Volunteer Management	<ul style="list-style-type: none"> Leverage role-matching and shift scheduling for volunteers Predict attendance and revenue forecasting for events Answer attendee and volunteer FAQs 24/7 with chatbot concierge
Policy & Advocacy	<ul style="list-style-type: none"> Track and summarize bills with passage likelihood Map influencers and sentiments for targeted advocacy Generate action alerts and draft letters for supporters

	PROGRAMS
Program Management	<ul style="list-style-type: none"> Predict and dynamically adapt program scheduling based on available resources Leverage agent to auto-generate tasks/workflows from field updates Optimize and reallocate programmatic resources dynamically
Outreach & Engagement	<ul style="list-style-type: none"> Coordinate multilingual chatbots to triage inquiries and give guidance Conduct risk-scoring to identify and flag urgent cases for staff follow-up Personalize messaging cadence via preferred channels
Research & Program Optimization	<ul style="list-style-type: none"> Synthesize literature to guide evidence-based design Mine program data to surface success drivers Draft surveys with a real-time AI analysis of responses
Project Applications	<ul style="list-style-type: none"> Monitor computer-vision for wildlife, damage, and crops Predict early-warning models for disease and disasters Assess counties that can most benefit from food assistance

	INSIGHTS & DECISION MAKING
Programmatic Reporting	<ul style="list-style-type: none"> Customize board and funder data summaries using live dashboards Convert voice-to-text for meetings and field notes into CRM Auto-review grant requirements, compliance and metrics
Data Collection & Quality	<ul style="list-style-type: none"> Leverage smart OCR and speech-to-text to digitize paper or interviews Deduplicate and validate master data for cleansing purposes Flag real-time anomalies during data entry
Strategy & Governance	<ul style="list-style-type: none"> Model scenario tests for capability and impact trade-offs Distill AI briefs into board packets and flag key risks Monitor governance dashboards on policy, finance, or ethics signals
Business & Operational insights	<ul style="list-style-type: none"> Analyze cross-system analytics to expose cost leaks or bottlenecks Predict staffing and demand forecasts to guide resourcing Leverage natural-language chat bot to “ask” for instant answers about data
Impact Evaluation & Learning	<ul style="list-style-type: none"> Estimate program impact leveraging AI counterfactual models Codify qualitative feedback at scale and surface patterns Automate KPI alerts feed continuous learning loops

Dot Good

Deloitte's Dot Good program helps nonprofits amplify social impact through **technology and business solutions** that give organizations more time to **focus on their mission**.

Dot Good pairs the deep expertise of Deloitte's **social sector practice** with its **world-class technology, business process, human capital, and change management** capabilities.

Our Vision for AI at Dot Good

As a leader in AI, we can help organizations harness the power of AI to amplify their impact—unlocking deeper insights, streamlining operations, **reaching more people than ever before**, and driving better outcomes.

AI empowers organizations to make smarter decisions, extend their reach, **respond to emerging needs faster**, and **elevate the voices of the communities they serve**.

But to realize these benefits, AI should be integrated ethically—protecting against bias, safeguarding data, and aligning with an organization's mission and values. Dot Good supports organizations in **adopting AI in a responsible, mission-driven way**, which can enhance both effectiveness and trust.

By putting people at the center and championing transparency, fairness, accountability, and reliability, we help nonprofits and philanthropies harness AI's full potential. Through **innovation, empathy, and continuous learning**, we're building a future where technology accelerates progress for all.

Connect with your facilitators for follow-up resources and explore ways to continue your AI journey.



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Notes



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