

AI in Action
Practical Applications for Nonprofits

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Your Presenters



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Three outcomes for today’s session

SESSION ROADMAP

01

Understand

Discuss adoption trends, governance issues, productivity, and risks.

02

Apply

Identify AI uses that improve organizational processes.

03

Launch

Plan and evaluate mission-focused initiatives.

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In 2025, exploration outpaced formal strategy

ADOPTION AND STRATEGY

85.6%

Exploring AI tools

24%

Had a formal strategy

43%

Relied on 1–2 staff for IT or AI decisions

Exploration does not establish deployment or impact.

TechSoup / Tapp Network, 2025. Survey summary of more than 1,300 nonprofit professionals.

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AI use and organizational impact differ

ADOPTION AND IMPACT

92%

Reported AI adoption

7%

Reported expanded team capability

47%

Had no AI policy

Different samples and measures — not a year-over-year comparison.

Virtuous, 2026. Self-reported vendor survey of 346 organizations. Not comparable to the 2025 survey.

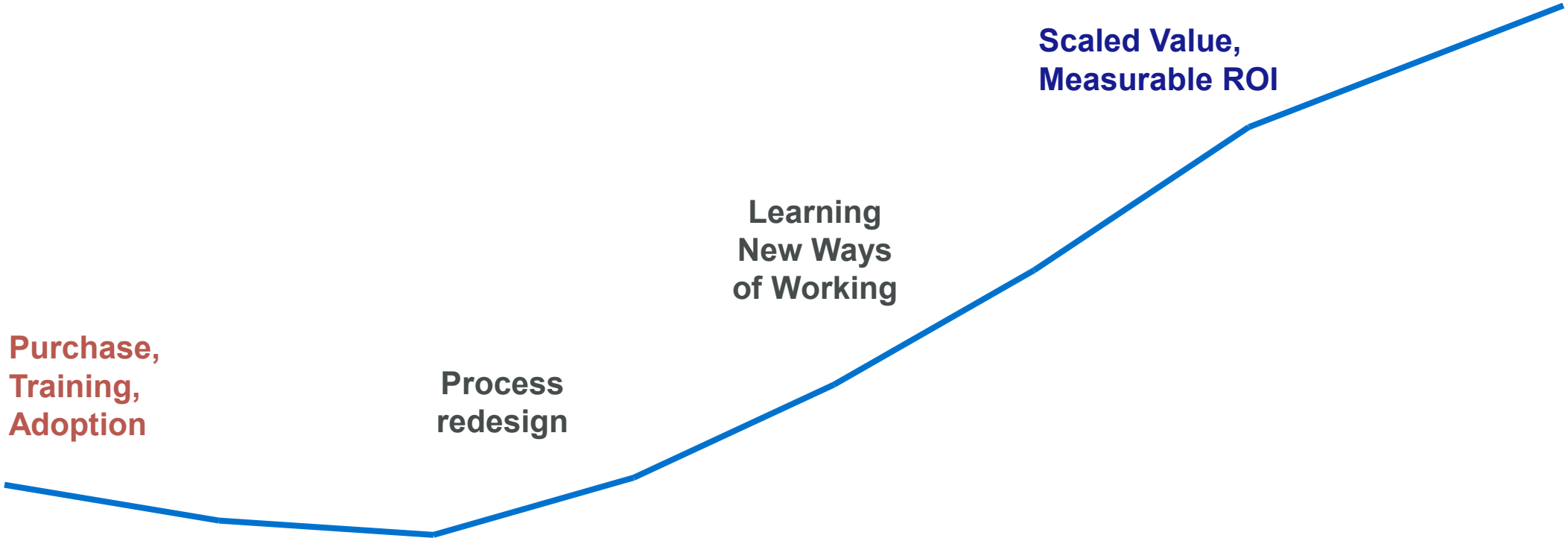
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The Solow Paradox

Costs arrive first. Organizational productivity often arrives later.

"You can see the computer age everywhere but in the productivity statistics."



Source: Brynjolfsson, Rock & Syverson, The Productivity J-Curve, NBER.

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Productivity: measure business value, not activity

Licenses and prompts are adoption measures, not outcomes

EFFICIENCY

Hours saved

- Cycle time reduced
- Faster close

QUALITY

Errors reduced

- Exceptions resolved
- Consistency

RISK

Loss avoided

- Controls strengthened
- Anomalies identified
- Potential fraud indicators identified and reviewed

CAPACITY

Work absorbed

- Faster onboarding
- Higher-value work enabled

Impact math: hours saved × rate + avoided loss + avoided external spend + increased revenues + better retention + new customers + …..

Hint: Your systems may not capture these measures during normal operations. You may need to request the data from use-case owners and pilot champions

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Data quality: What AI needs from you

AI alone may not resolve organizational ambiguity

Reliable inputs	Complete, current, traceable data
Shared definitions	One meaning for customer, revenue, margin, and exception
Process ownership	A person accountable for the workflow and outcome
Feedback loop	Corrections captured so performance improves over time

Without appropriate controls, AI can amplify existing data problems.

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Governance assigns decisions to people

RESPONSIBLE USE

ROLE	ACCOUNTABLE DECISION	EVIDENCE TO RETAIN
Board / oversight body	Risk appetite and oversight	Periodic risk and results report
Executive sponsor	Policy, funding, and escalation	Approved scope and policy
Process owner	Workflow and output approval	Review log and performance data
IT / privacy / legal	Tool and data review	Terms, access, and data assessment

Small teams can combine roles. Every decision still needs a named owner.

Suggested governance model, adapted from NIST AI RMF and NTEN resources.

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A usable AI policy answers six questions

RESPONSIBLE USE

Which tools?

Approved products, accounts, and terms.

Which data?

Sensitive-data rules and retention limits.

Which tasks?

Allowed uses and restricted decisions.

Who reviews?

A named reviewer before release or action.

When disclose?

Clear expectations for staff and audiences.

What if it fails?

Reporting route and authority to pause.

Adapt NTEN's policy template to your organization. Consult counsel on applicable obligations.

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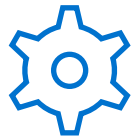
Workforce readiness needs practice and trust

PEOPLE AND READINESS



Map the work

Identify changed tasks and new review work.



Make space to practice

Use approved tools and realistic examples.



Teach verification

Check sources and know when to escalate.



Use saved time well

Connect verified capacity to mission work.

Build readiness with staff, not just with tools.

Suggested workforce practices informed by NTEN's responsible AI resources.

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What needs our attention now?

CASH FORECAST DEMO

Starting cash

$280,000

on October 26, 2026

Cash floor

$250,000

through the 13-week period

What if?

$210,000

receipt arrives 45 days late

- What we have: Weekly cash schedule + 20 open receivables.
- What we need: A forecast, stress case, and follow-up list.

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See the receipt timing and cash outflows

CASH FORECAST DEMO | DATA | CASH SCHEDULE

Raw schedule line	Dec 7	Dec 14	Dec 21
Receivable collections	$210,000	$2,100	$0
Individual giving	$8,000	$8,000	$22,000
Payroll + payroll taxes	$118,000	$0	$118,000
Vendors + supplies	$17,500	$17,500	$32,500
Insurance premium	$0	$0	$38,000

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Read the source rows before ranking them

CASH FORECAST DEMO | DATA | RECEIVABLES

ID	Payer	Amount	Days out	Typical days
AR-103	County Behavioral Health	$48,500	97	45
AR-104	United Way of Lakeshore	$36,000	74	30
AR-105	City Youth Services	$27,800	88	40

Raw inputs: amount, days outstanding and typical payment time.

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Ask for a forecast and an attention list

CASH FORECAST DEMO | PROMPT

01 Forecast

Using the cash schedule and receivables, show 13 weeks of ending cash and flag weeks below $250,000.

02 Prioritize

Rank overdue receivables by amount × days past typical payment time.

03 Verify

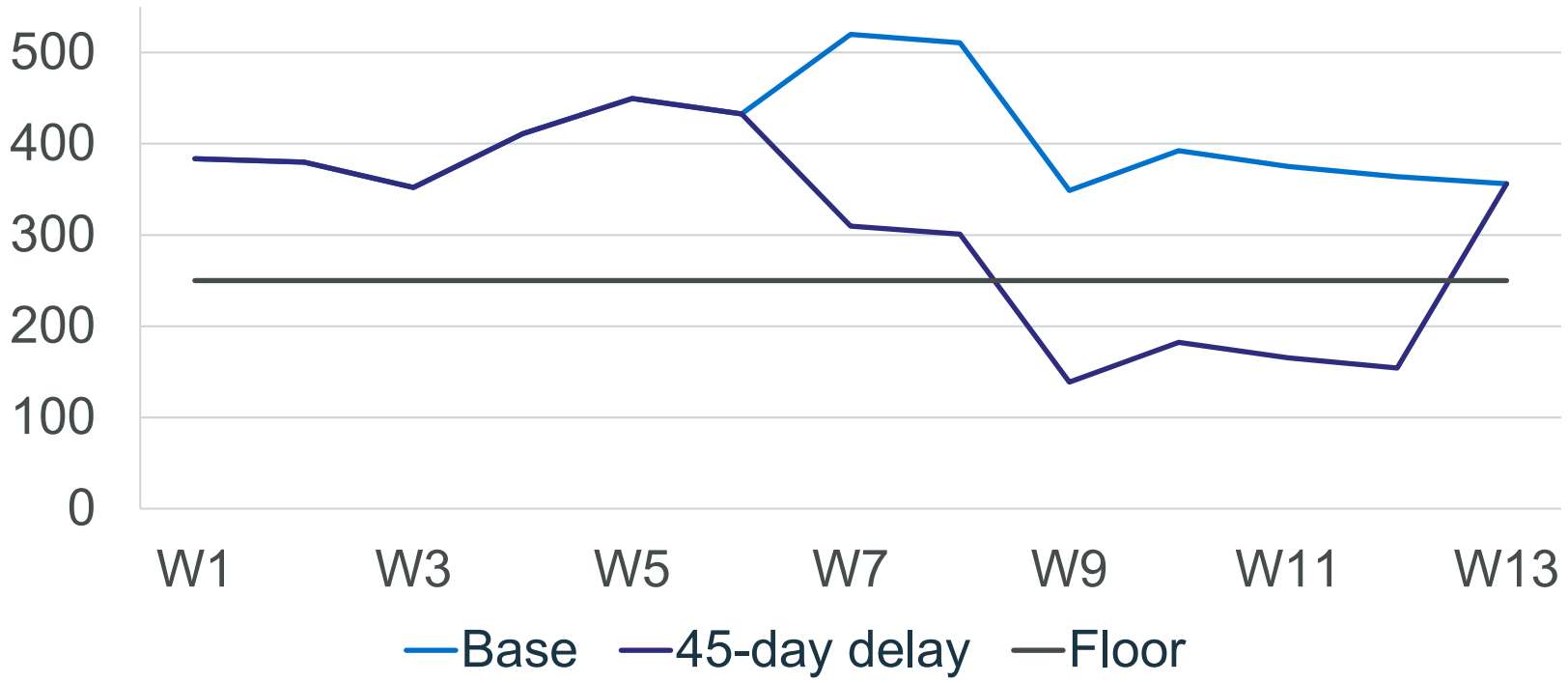
Cite sources, show assumptions, and list missing evidence. Do not add collections already in the forecast.

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Four weeks below the cash floor

CASH FORECAST DEMO | RESULT

Weekly ending cash ($K) | W1 Oct 26; W13 Jan 18



$111,250

Max gap to floor

Base: $348,750
Delay: $138,750
Week of Dec 21

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Prioritize follow-up. Don’t count it twice.

CASH FORECAST DEMO | RESULT

Priority / Payer	Amount	Days out − typical
1 County Behavioral Health	$48,500	97 − 45 = 52
2 United Way of Lakeshore	$36,000	74 − 30 = 44
3 City Youth Services	$27,800	88 − 40 = 48
4 Prairie Health Plan	$19,400	81 − 35 = 46
5 Hartwell Family Foundation	$25,000	62 − 30 = 32
Already in forecast	$156,700	Not new cash

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How can we reconcile multiple bank accounts?

RECONCILIATION DEMO | CASE

Six cash accounts

$302,617

Approximate total across 6 bank accounts.

Close period

Sep 2026

Statement date: September 30, 2026

CFO question

Can AI reconcile six accounts at once, flag exceptions, and produce review-ready workpapers?

Goal: use one consolidated analysis to assist with six reconciliations and help reviewers focus on exceptions.

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Start with six bank and ledger balances

RECONCILIATION DEMO | DATA

Account	Account name	Fictional bank	Bank balance	GL balance
1010	**Operating Checking**	**Lakeside Community Bank**	**$11,700.00**	**$11,962.81**
1020	Program Services Checking	Harbor National Bank	$12,682.81	$12,682.81
1030	Board-Designated Reserve	Northshore Trust	$162,404.58	$162,404.58
1040	Restricted Grant Clearing	Lakeside Community Bank	$117.00	$117.00
1050	Capital Reserve	Harbor National Bank	$115,713.00	$115,713.00
1060	**Employee Benefits Clearing**	**Lakeside Community Bank**	**$0.00**	**$0.01**

Two accounts differ before reconciling: Operating Checking and Employee Benefits Clearing.

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Ask for six reconciliations in one pass

RECONCILIATION DEMO | PROMPT

01 Match	Using the Combined Transactions and Account Control tabs, reconcile all six cash accounts for September 2026. Match bank and ledger lines on account, amount, date, reference, and description.
02 Identify	Identify outstanding deposits, outstanding checks, bank-only or ledger-only items, and amount differences.
03 Summarize	Create a summary by account: bank balance, reconciling items, adjusted bank balance, GL balance, variance and status.
04 Explain	List every exception with a next step; close with a three-sentence finance-leadership summary.

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Five of six accounts reconcile to zero

RECONCILIATION DEMO | RESULT

Acct	Account name	Bank balance	+ In transit	− Uncleared	Adjusted bank	GL balance	Variance
1010	Operating Checking	$11,700.00	$350.00	$87.19	$11,962.81	$11,962.81	$0.00
1020	Program Services Checking	$12,682.81	—	—	$12,682.81	$12,682.81	$0.00
1030	Board-Designated Reserve	$162,404.58	—	—	$162,404.58	$162,404.58	$0.00
1040	Restricted Grant Clearing	$117.00	—	—	$117.00	$117.00	$0.00
1050	Capital Reserve	$115,713.00	—	—	$115,713.00	$115,713.00	$0.00
1060	**Employee Benefits Clearing**	**$0.00**	**—**	**—**	**$0.00**	**$0.01**	**($0.01)**
	Total	**$302,617.39**	**$350.00**	**$87.19**	**$302,880.20**	**$302,880.21**	**($0.01)**

Operating Checking reconciles after two timing items. Employee Benefits Clearing stays in Review.

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Three exceptions, each with a next step

RECONCILIATION DEMO | RESULT

Account	Exception	Reference	Amount	Confidence	Next step
Operating Checking	Deposit in transit	GL-1004	$350.00	91%	Verify clearing on October statement
Operating Checking	Outstanding payment	GL-1005	$87.19	93%	Verify clearing on October statement
Employee Benefits Clearing	**Amount exception**	**BNK-6001 / GL-6001**	**$0.01**	**72%**	**Confirm source amount; correct ledger if needed**

All three fall below 95% confidence, so a reviewer checks each one.

Only the $0.01 difference needs a correction decision; the other two are timing items.

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Can I trust this budget?

BUDGET DEMO | CASE

Draft v3

$3,734

Surplus

It looks balanced.

Planning period

FY 2028

July 1, 2027–June 30, 2028

CFO question

Which assumptions actually drive the result?

A balanced total does not prove the assumptions were applied.

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Read the assumptions

BUDGET DEMO | DATA

Selected source input	Raw value
Peer Recovery award	$280,000; ends Sep 30, 2027
Health premium / increase	$700/month; 12% from Jan 1, 2028
P-195 Clinical Supervisor	$78,000; starts Mar 1, 2028

FY2028 = July 2027–June 2028. These are inputs—not findings.

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Inspect what the draft actually stores

BUDGET DEMO | DATA

Draft cell / month	Stored content	USD
Operating Budget!E7 Oct 2027	=Assumptions!B39/12	$23,333
Personnel!L106 Jan 2028	37,800 (typed)	$37,800
Personnel!F99 Jul 2027	6,500 (typed)	$6,500

Compare these cells with the source data and assumptions.

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Ask for traced issues and ranked drivers

BUDGET DEMO | PROMPT

01	Explain	Explain how this FY2028 budget model works and list its key assumptions.
02	Inspect	Then flag any cell where a typed-in value overrides an assumption or formula, any revenue budgeted outside a grant's award period, and any position budgeted before its start date.
03	Correct	Estimate the effect of each issue on the bottom line and show the corrected result.
04	Rank	Finally, using the low and high values on the Assumptions tab, show the three assumptions with the largest effect on the bottom line.

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Correcting the identified issues changes a small surplus to a $180,313 deficit

BUDGET DEMO | RESULT

Bridge to corrected result	Effect / result
Draft surplus	$3,734
Remove grant revenue *ended at FY	($210,000)
Apply the health increase *manual input	($27,888)
Fix supervisor start date *overstated costs	$53,841
Corrected deficit	($180,313)

Corrected deficit

($180,313)

Draft surplus

$3,734

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Follow-up Prompts

BUDGET DEMO | PROMPT 2

Change

Change the health insurance increase to 8%. What happens to the bottom line?

Options

Draft three options to close the $180,000 gap for the finance committee, with the dollar effect of each and the risk of each.

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A reusable prompt makes limits explicit

PROMPT DESIGN

A REUSABLE PROMPT

Using only the approved source below, draft a 150-word board summary for nonprofit directors.

Separate facts from interpretation. Cite the source section beside each factual claim. Say “not provided” for missing details. Do not infer causes or create numbers. End with questions for the reviewer.



Context

Audience and task



Boundary

Approved sources



Review

Evidence and gaps

Prompt instructions do not guarantee correctness. The reviewer remains accountable.

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Pilot selection balances value with exposure

PILOT PLANNING

Four screening questions

- Is the burden recurring?
- Are approved inputs reliable?
- Can a person verify the output?
- Are consequences manageable?

Candidate	Suggested decision
Procedure checklist	Good first candidate
Financial narrative	Pilot with finance review
Service eligibility decision	Defer until enhanced safeguards

Choose one bounded workflow with a named process owner.

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A 90-day pilot has decision gates

PILOT PLANNING

DAYS 1–15

Define

Name the owner. Measure today's process.

Scope agreed

DAYS 16–30

Prepare

Approve tool and data. Build test cases.

Ready to test

DAYS 31–60

Pilot

Limit users and volume. Review every output.

Evidence collected

DAYS 61–90

Decide

Compare results. Expand, revise, or stop.

Decision recorded

Suggested planning cadence, not a benchmark. Adjust the duration to the risk and available capacity.

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A pilot scorecard measures net value

PILOT EVALUATION

Measure	Evidence to collect	Illustrative decision gate
Cycle time	Total time, including review	At least 20% below baseline
Correctness	Errors and reviewer corrections	Zero material errors after review
Oversight and privacy	Review log and incident log	All reviewed, no unauthorized disclosure
Full cost and staff effort	Licenses, setup, training, review	Within approved resource limits
Mission capacity	Time redeployed to a named task	Owner confirms useful capacity

Illustrative gates, not promised results. Agree thresholds before testing. Pause on a significant incident.

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Q&A



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