AI…what it means to charities

6 March 2024

Keith Collins

Principal Consultant, Adapta

Mark Luckins

Senior Consultant, Adapta

adapta

processes, people and technology

Making Digital Real

- We are a **specialist** information systems consultancy

- We only work with **charities**, associations, trusts and others in the not-for-profit sector

- We are completely **supplier-independent**

- Our consultants have held **senior** positions in a broad range of different organisations

- Our advice and guidance is based on **practical experience** gained over many years

Our Mission and Purpose

Our Mission

We **empower** organisations to deliver transformational impact through more effective use of technology and ways of working

adapta

From our minds…

Our Mission

We **empower** organisations to deliver transformational impact through more effective use of technology and ways of working

Our Purpose

From **our minds to your minds** – our team of experienced, independent consultants work with you to transfer their knowledge, share their expertise, and **develop your organisational capability**

adapta

...to your minds

Our Mission

We **empower** organisations to deliver transformational impact through more effective use of technology and ways of working

Our Purpose

From **our minds to your minds** – our team of experienced, independent consultants work with you to transfer their knowledge, share their expertise, and **develop your organisational capability**
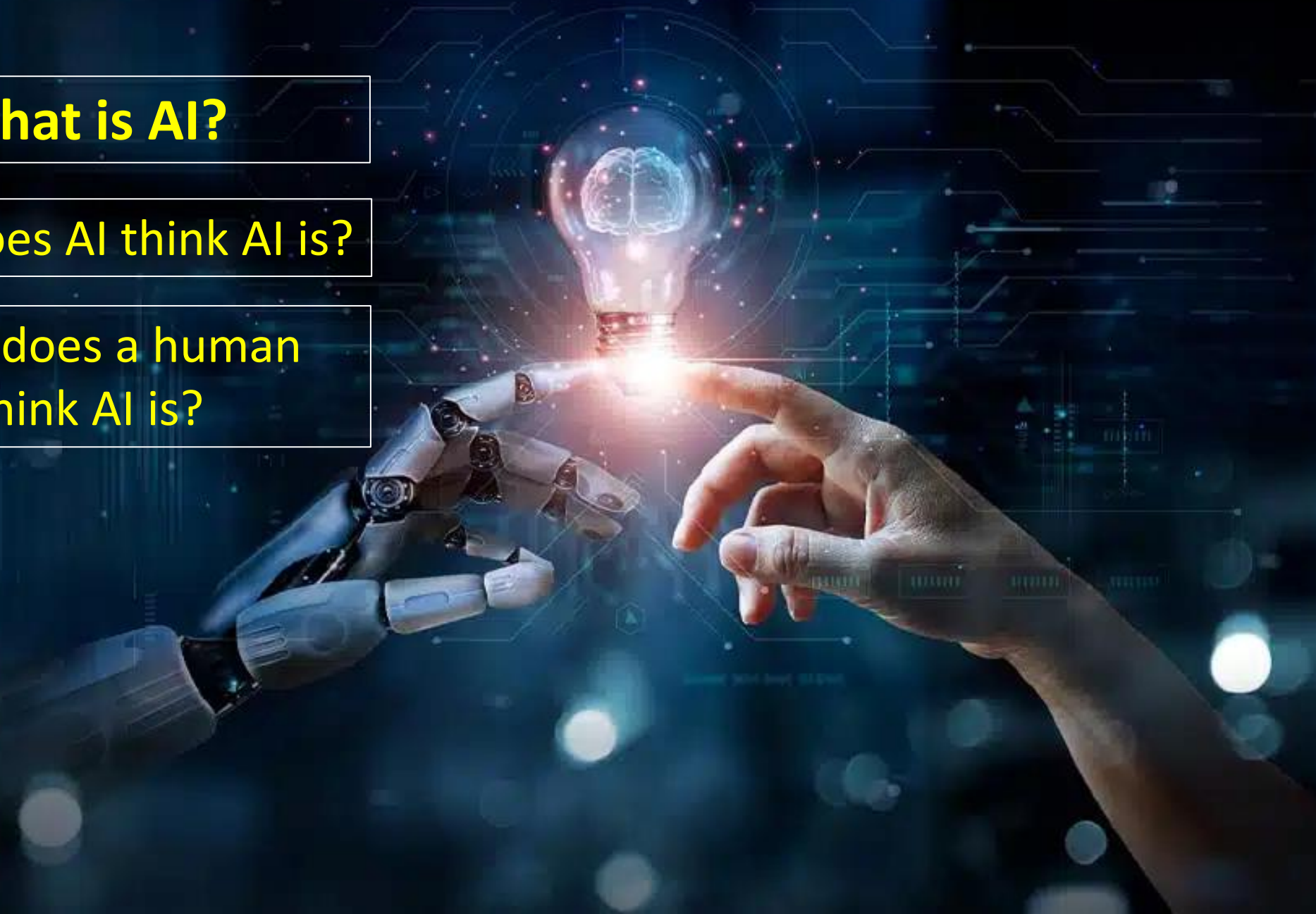
adapta

What is AI?

What is AI?

What does AI think AI is?

What does a human think AI is?

ChatGPT

AI, or Artificial Intelligence, refers to the simulation of human intelligence processes by machines, especially computer systems. These processes include learning (the acquisition of information and rules for using the information), reasoning (using rules to reach approximate or definite conclusions), and self-correction. AI encompasses a wide range of technologies and applications, from basic machine learning algorithms to advanced systems capable of autonomous decision-making.

There are various subfields within AI, including:

1. Machine Learning: Algorithms that allow computers to learn from and make predictions or decisions based on data.
2. Deep Learning: A subset of machine learning where artificial neural networks mimic the structure and function of the human brain to learn and make decisions.
3. Natural Language Processing (NLP): The ability of computers to understand, interpret, and generate human language.
4. Computer Vision: The field of AI that focuses on enabling computers to interpret and understand visual information from the real world.
5. Robotics: The design, construction, operation, and use of robots to perform tasks autonomously or with human assistance.

ChatGPT

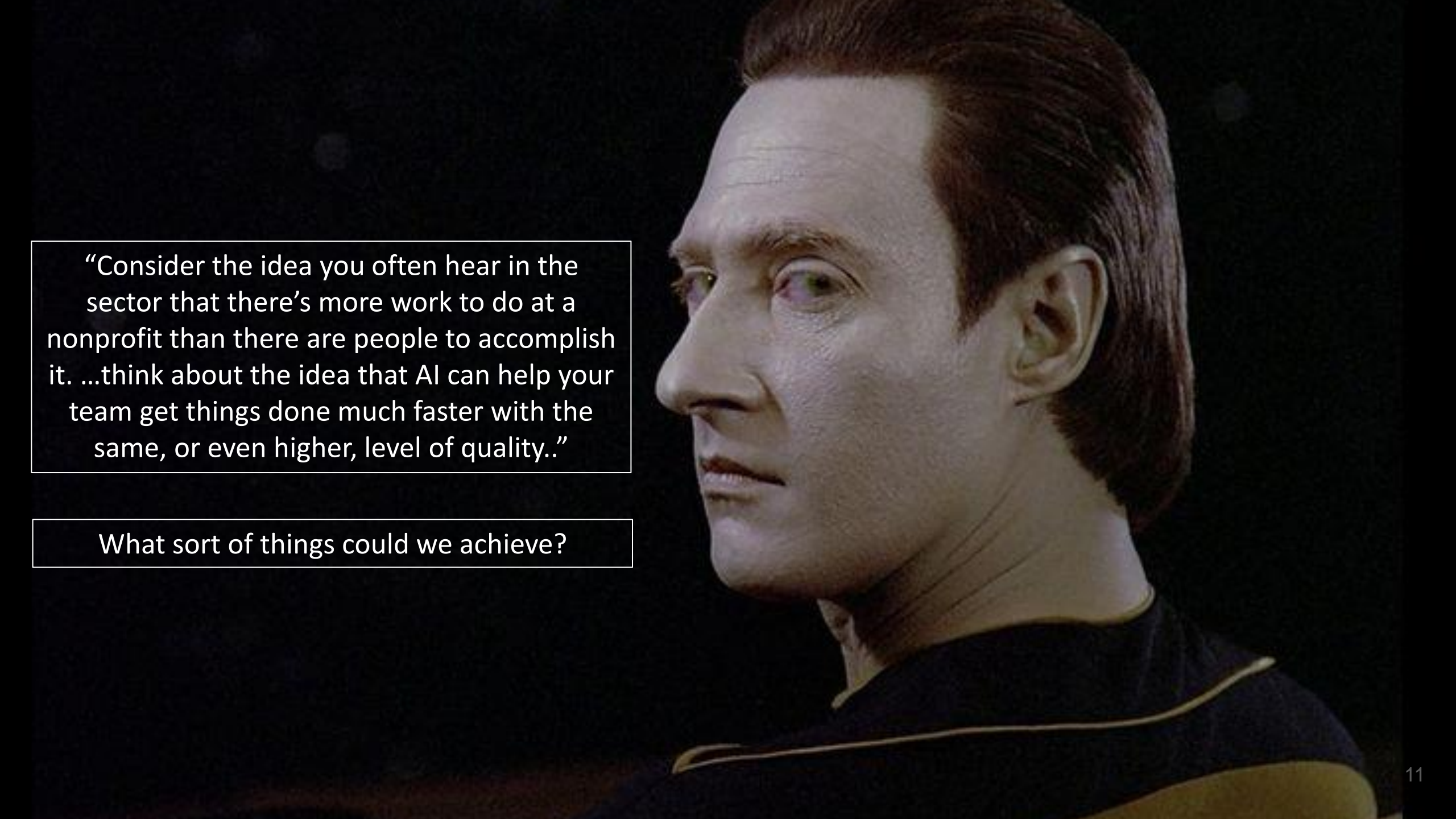**Jeffrey Appell**
CEO, Heller Consulting

ChatGPT

AI, or Artificial Intelligence, refers to the simulation of human intelligence processes by machines, especially computer systems. These processes include learning (the acquisition of information and rules for using the information), reasoning (using rules to reach approximate or definite conclusions), and self-correction. AI encompasses a wide range of technologies and applications, from basic machine learning algorithms to advanced systems capable of autonomous decision-making.

There are various subfields within AI, including:

1. Machine Learning: Algorithms that allow computers to learn from and make predictions or decisions based on data.
2. Deep Learning: A subset of machine learning where artificial neural networks mimic the structure and function of the human brain to learn and make decisions.
3. Natural Language Processing (NLP): The ability of computers to understand, interpret, and generate human language.
4. Computer Vision: The field of AI that focuses on enabling computers to interpret and understand visual information from the real world.
5. Robotics: The design, construction, operation, and use of robots to perform tasks autonomously or with human assistance.

"Consider the idea you often hear in the sector that there's more work to do at a nonprofit than there are people to accomplish it. ...think about the idea that AI can help your team get things done much faster with the same, or even higher, level of quality.."

AI and The Future of Nonprofit Technology - Heller Consulting (teamheller.com)

10

"Consider the idea you often hear in the sector that there's more work to do at a nonprofit than there are people to accomplish it. ...think about the idea that AI can help your team get things done much faster with the same, or even higher, level of quality.."

What sort of things could we achieve?

Crisis Text Line: Crisis Text Line is a non-profit organization that provides free crisis intervention via SMS message. They use AI to analyse incoming texts and prioritise them based on the level of urgency. Natural language processing (NLP) algorithms help identify keywords and patterns in messages to assess the severity of the situation, allowing volunteers to respond more effectively to those in immediate need.

Charity: Water: Charity: Water is a non-profit organisation that aims to bring clean and safe drinking water to people in developing countries. They have employed AI for various purposes, including data analysis to optimize the locations for well construction based on factors like population density, water scarcity, and geological conditions. Additionally, they use machine learning algorithms to forecast maintenance needs for water projects, ensuring sustainability and longevity.

World Wildlife Fund (WWF): One notable initiative is their use of AI-powered personalised marketing campaigns. By leveraging machine learning algorithms, WWF analyses donor data to gain insights into individuals' preferences, behaviours, and donation history. With this information, they can create highly targeted and personalized fundraising appeals tailored to each donor's interests and giving capacity

Crisis Text Line: Crisis Text Line is a non-profit organization that provides free crisis intervention via SMS message. They use AI to analyse incoming texts and prioritise them based on the level of urgency. Natural language processing (NLP) algorithms help identify keywords and patterns in messages to assess the severity of the situation, allowing volunteers to respond more effectively to those in immediate need.

Charity: Water: Charity: Water is a non-profit organisation that aims to bring clean and safe drinking water to people in developing countries. They have employed AI for various purposes, including data analysis to optimize the locations for well construction based on factors like population density, water scarcity, and geological conditions. Additionally, they use machine learning algorithms to forecast maintenance needs for water projects, ensuring sustainability and longevity.

World Wildlife Fund (WWF): One notable initiative is their use of AI-powered personalised marketing campaigns. By leveraging machine learning algorithms, WWF analyses donor data to gain insights into individuals' preferences, behaviours, and donation history. With this information, they can create highly targeted and personalized fundraising appeals tailored to each donor's interests and giving capacity
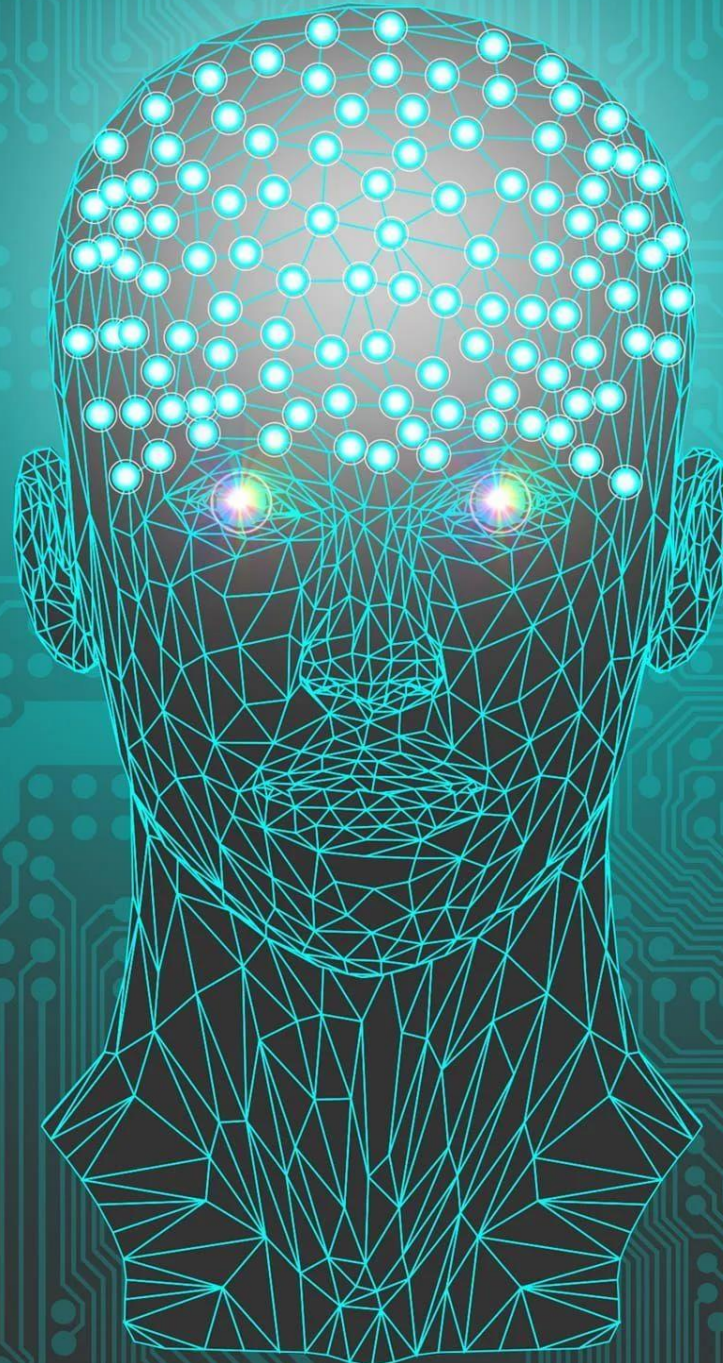
Service delivery focus
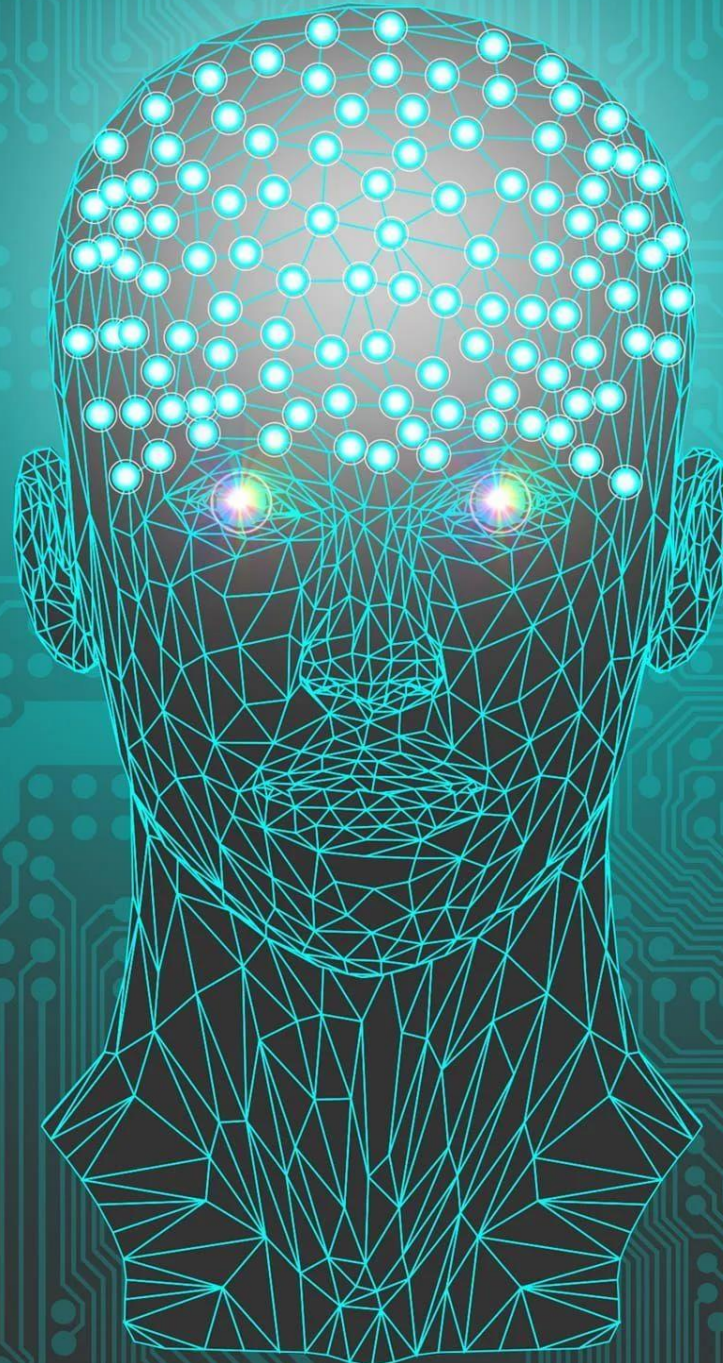
Programme management focus
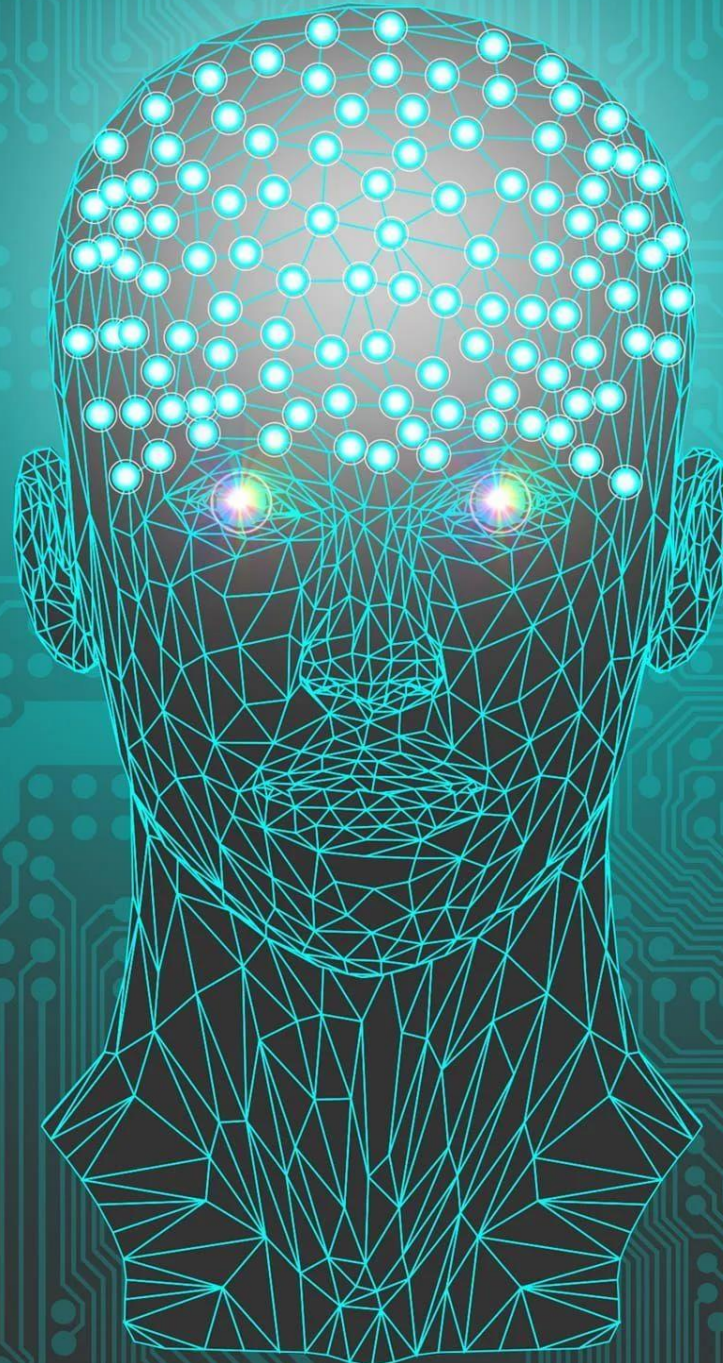
Fundraising focus

How could AI help a charity?

How could AI help a charity?

Internal focus – i.e. automation to drive efficiencies

How could AI help a charity?

Internal focus – i.e. automation to drive efficiencies

External focus – i.e. automation to improve your engagement

Adapta's emerging AI Use Cases for non-profits

Social assistants and robots

Train a machine to do something core for your mission

Have natural language conversations with your charity avatar

Build code and integrations

Use to execute a fundraising campaign

Use natural language to talk to your digital content and knowledge

Agents (e.g. for staff induction, for supporter care)

Fundraising propensity models

Build Simple Apps and Forms

Relationship Management Buddy

Learn in the Metaverse

Project Management buddy

Service/Helpline Buddy

Use to generate copy or media

3rd PARTIES CAN DO IT

IT CAN DO IT

YOU CAN DO IT

PRODUCTS EXIST TODAY   **PRODUCTS EXPECTED/CAN BE DEVELOPED**   **COMMODITISED SERVICES WITHIN 3 YEARS**

Grants AI use cases

3RD PARTIES CAN DO IT

Match Making Platforms

Universal Grant Proposals

Organisation Intel

Grant Manager Co-Pilot

Social Need Intel

Applicant Finder

Project Finder

IT CAN DO IT

24x7 Multi-Language Applicant AI Assistant

Panel Summaries

AI Delivered Impact Reporting

Pipeline Financial Analysis and Project Clustering

Support Risk Analysis

YOU CAN DO IT

Application Summarisation

Talk to my Program

Eligibility Checker

PRODUCTS EXIST TODAY　　　**PRODUCTS EXPECTED/CAN BE DEVELOPED**　　　**COMMODITISED SERVICES WITHIN 3 YEARS**

Where are the AI tools that you can adopt? A look at the AI landscape as it relates to non-profits

Copilot for Microsoft 365

Unlock productivity and unleash creativity

Natural Language

Large Language Models	+	Microsoft Graph - Your Data -	+	Microsoft 365 Apps	+	The Internet

Copilot business value: sample metrics

All Up Value

Productivity / Efficiency / Fulfillment / Creativity
- X% more productive
- X% more satisfying work
- X% able to focus on more fulfilling work
- Save X hours per day for more important work
- Spend X% less time in meetings, processing email
- Less time on repetitive or mundane tasks
- Stay in the flow
- Be more creative

"Worth It"
- X% would not want to go back to working without Copilot
- Disappointed if had to give it up
- Influence choice of employer

Value by Workflow

Microsoft Copilot
- Less time searching for information
- Complete tasks faster
- Stay on top of my inbox
- Focus on more important work

Effective Meetings [Teams]
- More efficient meetings
- Easier to catch up on what I missed
- Easier to take next action
- Attend fewer meetings

Email Processing [Outlook]
- Less time processing email
- Saves time drafting quick replies

Content Writing [Word]
- Generate a good first draft faster
- Jump start the creative process

Visual Content Creation [PowerPoint]
- Create visually appealing presentations faster
- Create content I couldn't have on my own
- Less intimidated creating visual content

Data Analysis [Excel]
- Analyze data faster
- Help me turn data into insights

Search [Bing Chat]
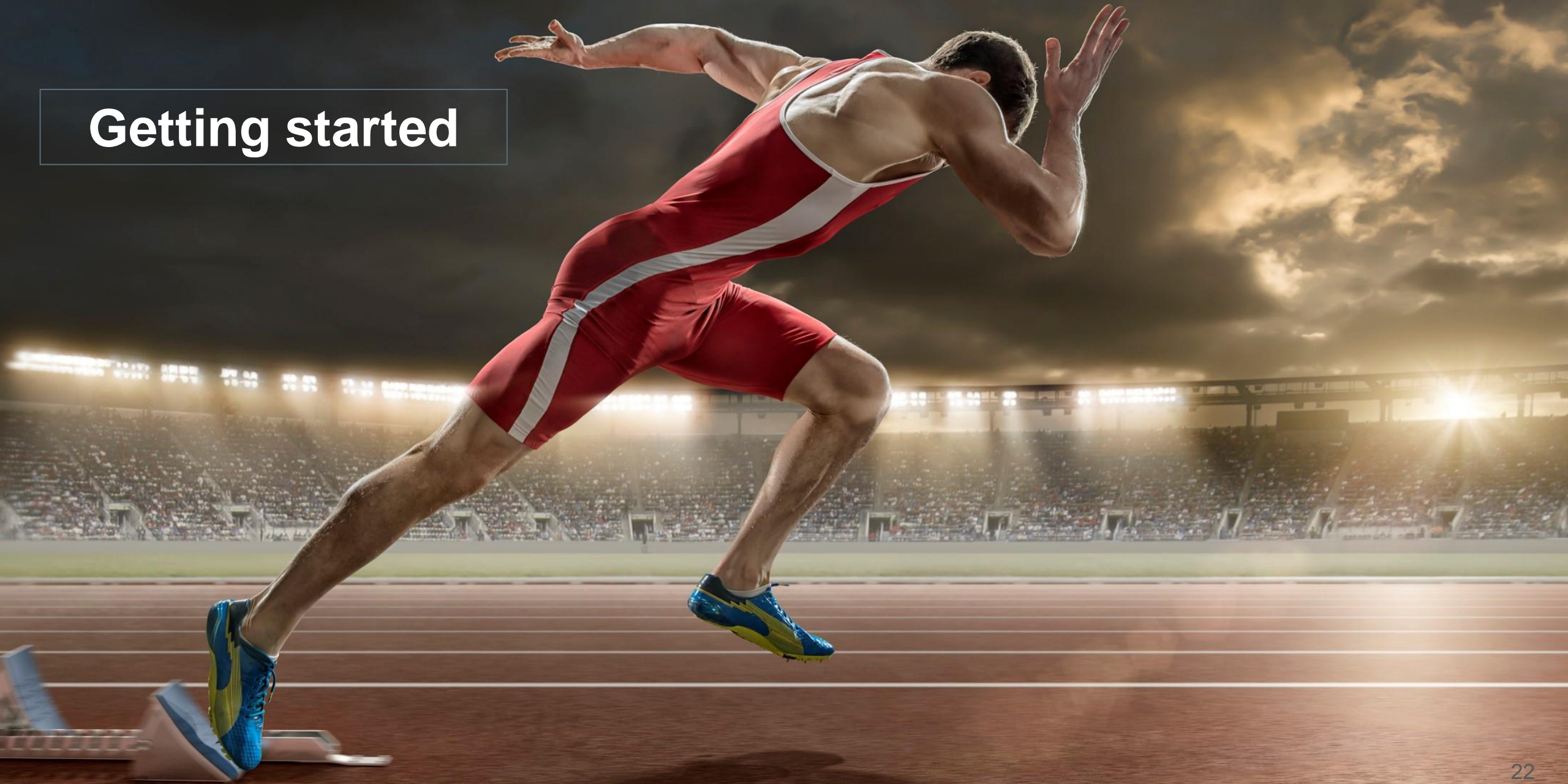- Speed and accuracy

Value by Role/Function

1. By Persona
   - **IC:** Content creation, project management, less time on mundane tasks, etc.
   - **Manager:** More time for team development, etc.
   - **BDM:** Make decisions faster; focus on top priorities, grow business
2. By Role/Function: Sales, Finance, HR, etc.
   - **Sales (Example Metrics):**
     – X% more customer interactions
     – Created X% more opportunities
     – Created customer proposals X% faster
     – Discovered and shared X% more sales content
     – Closed deals X% faster

Getting started

What are your AI use cases?

Y-axis (bottom to top): YOU CAN DO IT · IT CAN DO IT · 3ʳᵈ PARTIES CAN DO IT

X-axis (left to right): PRODUCTS EXIST TODAY · PRODUCTS EXPECTED/CAN BE DEVELOPED · COMMODITISED SERVICES WITHIN 3 YEARS

- Social assistants and robots
- Train a machine to do something core for your mission
- Have natural language conversations with your charity avatar
- Build code and integrations
- Use to execute a fundraising campaign
- Use natural language to talk to your digital content and knowledge
- Agents (e.g. for staff induction, for supporter care)
- Fundraising propensity models
- Build Simple Apps and Forms
- Relationship Management Buddy
- Project Management buddy
- Service/Helpline Buddy
- Learn in the Metaverse
- Use to generate copy or media

Is now the time to sort out your data?

Identify 'Data Use Cases' as well as your 'AI Use Cases' – and bring them together

How can I use data to truly understand how best to support our beneficiaries?

How can I use data to evidence the impact we are making?

How can I use data to advocate for change?

How can I use data to deliver personalised engagement with our donors, fundraisers and volunteers?

How can I use data to forecast next year's likely revenues for budget setting?

Bad Data +AI = problems happening more quickly!

Image: MidJourney

| **Transparency & accountability** | Charities should ensure transparency regarding the use of AI systems, including how they collect, process, and utilise data. They should be accountable for the decisions made by AI algorithms and provide explanations when necessary, especially when those decisions affect individuals or communities. |

| **Fairness & Bias Mitigation** | AI systems can inadvertently perpetuate biases present in the data used to train them. Charities must strive to mitigate biases and ensure fairness in their AI applications, particularly in decision-making processes that impact marginalised or vulnerable groups. |

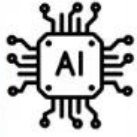| **Copyright, Privacy & Protection** | Charities must prioritise the privacy and protection of individuals' data and creator rights when deploying AI technologies. They should comply with relevant regulations and law as well as implement robust measures to safeguard sensitive information from unauthorised access or misuse. |

| **Do Good & Not Bad** | Charities should ensure that their AI initiatives prioritise the well-being of individuals and communities. They must consider the potential positive and negative impacts of AI technologies on stakeholders and take steps to maximise benefits while minimising harm. |

| **Inclusive & Accessible** | Charities should strive to make their AI technologies inclusive and accessible to all individuals, regardless of factors such as socioeconomic status, education level, or physical ability. They should consider accessibility requirements and design AI systems that are usable and beneficial for diverse user populations. |

| UNESCO	IEEE	IBM

UNESCO ethical recommendations are based on specific core values such as human dignity and rights, promoting peace, and care for the environment. Based on these values, UNESCO specifies ten principles:
1. Proportionality and Do No Harm
2. Safety and Security
3. Right to Privacy and Data Protection
4. Multistakeholder and Adaptive Governance & Collaboration
5. Responsibility and Accountability
6. Transparency and Explainability
7. Human Oversight and Determination
8. Sustainability
9. Awareness and Literacy
10. Fairness and Non-discrimination [38]
	The IEEE Standards Association (SA) has established a Global Initiative on the Ethics of Autonomous and Intelligent Systems. The IEEE approach is established on eight fundamental principles:
	1. Human Rights,
	2. Well-being,
	3. Data Agency,
	4. Effectiveness,
	5. Transparency,
	6. Accountability,
	7. Awareness of Misuse, and
	8. Competence [39]
		IBM proposes three guiding values for AI:
		1. The purpose of AI is to augment human intelligence,
		2. Data and insights belong to their creator, and
		3. Technology must be transparent and explainable.
		Leveraging insights from the 1979 Belmont Report, IBM defines three overarching principles for AI:
		1. Respect for persons,
		2. Beneficence, and
		3. Justice, i.e., burdens and benefits may be distributed either by:
		  a. Equal share,
		  a. Individual need,
		  a. Individual effort,
		  a. Societal contribution, or
		  a. Merit [40]
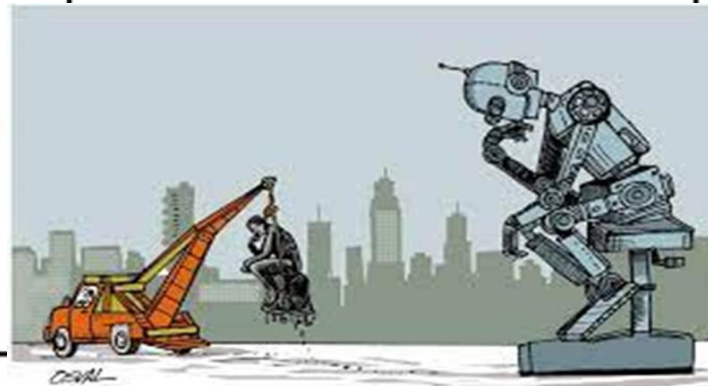
Table 1. Ethical Principles Statements from selected organizations

AI Adoption in your organisation

Three-phase approach to business progress

01 Phase

02 Phase

03 Phase

Readiness

Controlled Adoption

Mainstream

- Identify AI and data use cases
- Focus efforts in one or two key teams, clarify role of IT and similar enabling teams
- Learn, experiment, iterate.
- Create an AI or data council under SLT to oversee activity, develop policy and build capabilities

- Gate AI use cases into production.
- Identify and upskill accountable parties
- Manage risks and test against policy and/or ethics
- Monitor and report on use

- Fully deploy and incorporate into all operational processes
- Maintain oversight and audit as appropriate to the type of AI and risks.

From Tilak, Hope & Home for Children

1. For an organisation that not very digitally mature/literate, what's the best way people have found of explaining the benefits of AI, instead of them focussing on a 'Terminator' situation? Analogies welcome

2. Could you give a range of examples in how AI can be implemented in non-profits on 3 levels: easy/quick (e.g. generate tweets/newsletters), realistically attainable in the short term (e.g. chatbots to signpost to knowledgebase articles), desirable but would need a lot of time/money

3. What checks can we use to ensure data entered is safe? I.e. ensuring internally-researched (sensitive) info used to write a bio/proposal isn't used as part of the learning. Are some tools better than others for this security?

4. Which tools are better which type tasks (e.g. research vs writing proposals vs writing strategies)?

5. As some staff will already be using AI under the radar, what guidance and protection measures can we give for using new platforms?

Next events:

Data: Thinking strategically, and making it real (and cake) 26 March, 2pm, Royal College of Nursing

Marketing technology - a briefing for non-profits, 25 April, 2pm, Zoom