



What Grantmakers (And Their Recipients) Actually Think About AI

Craig Parker

Global SaaS Partnerships Lead at Microsoft
Tech for Social Impact

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What we'll discuss today



AI for Nonprofits



Grantmaker and Recipient Research Findings



How you can experiment with AI



Q&A



Craig Parker



Global SaaS Partnership Lead, Digital Natives Partner Program at Microsoft Tech for Social Impact.



Live in the beautiful countryside near Manchester, UK.



Passionate about helping partners succeed. Busy dad with two energetic sons.



Makeda Adisu



Lived in the Bay Area for 7 years before returning back home to Seattle, WA



Sang second soprano in an a cappella group back in college



Passionate about psychology and design for social impact!

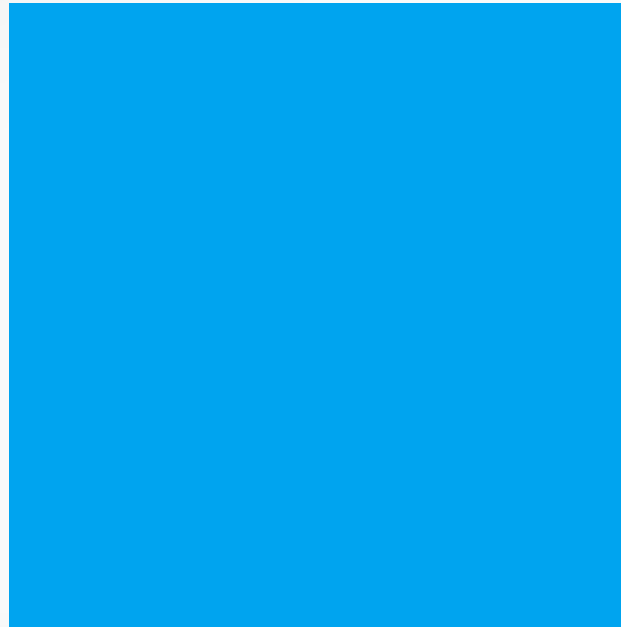
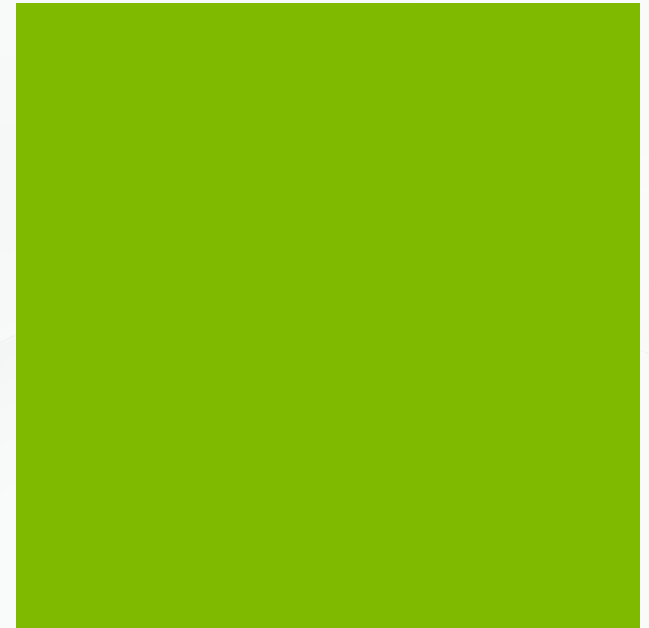


Global changes are rapid and unpredictable



Microsoft mission

Empower every person
and every organization on
the planet to achieve more.



TECH FOR SOCIAL IMPACT

Empower every nonprofit and mission driven organization with Microsoft technology to accelerate social good



Supporting nonprofits is a part of our DNA

In fiscal
year 2023,
Microsoft
provided



\$3.8 billion

In grants or discounted software and services



\$242 million

Donated by Microsoft employees (including company match) to support nonprofits around the world



325,000+

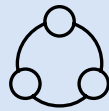
Nonprofit organizations equipped with modern, secure, and scalable Microsoft cloud solutions

Tech for Social Impact



A NEW SOCIAL INVESTMENT MODEL

Affordable Technology
& Solutions



Capacity
Building



Investing in:
Humanitarian action
AI for Good
Skills & employability
Affordable housing

Social
Investment Model

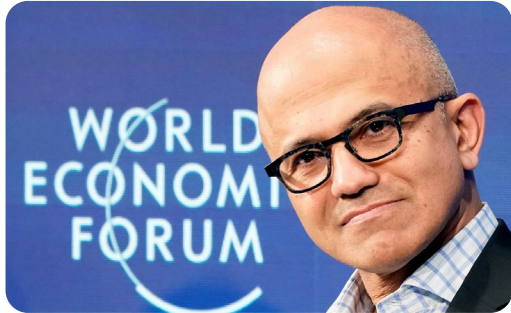


Partner
Ecosystem



Integrating philanthropy and affordable commercial sales

AI out in the open



Satya Nadella Says AI Golden Age Is Here and 'It's Good for Humanity'

World Economic Forum



Microsoft Invests \$10 Billion in ChatGPT Maker OpenAI

Bloomberg



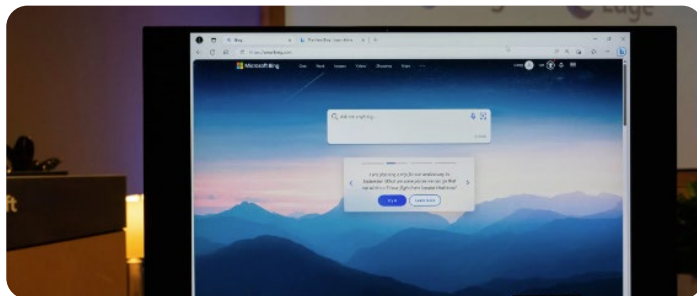
Microsoft Launches AI-Powered Search, 'Binging' In The Next Generation Of The Internet

Forbes



Bing (Yes, Bing) Just Made Search Interesting Again

New York Times



A Conversation With Bing's Chatbot Left Me Deeply Unsettled

New York Times



Microsoft's President Backs New Agency to Regulate ChatGPT, Other AI Systems

The Wall Street Journal



What is AI, is it dangerous and what jobs are at risk?

BBC News

AI for nonprofits and fundraisers



Today's nonprofit challenges (& opportunities)



Staffing

33% or more of nonprofits report that at least 20% of job vacancies go unfilled. This is double (40%) for fundraising roles.



Donor retention

Donor retention fell 6.2% and total donors fell 5.6%.²



Personalized communication

77% of nonprofits believe personalizing donor communication is critical.³



Online giving growth

Since 2021, online giving has grown 12% YoY.⁴









Increased time efficiency

Workers globally spend 35% of their time on repetitive tasks.⁵

¹The Independent Sector; ²[AFP Global](#); ³[Twillo](#); ⁴[Giving USA](#); ⁵[Clockify](#)

Nonprofit use cases

FUNCTION Nonprofit role in the organization	 Fundraising	 Marketing	 Program Delivery	 Data Management	 Finance	 Operations
JOB Primary responsibilities/duties in the organization	Donor Management <ul style="list-style-type: none"> • Fundraising Strategy & Communications • Grant Management 	Mission Activation <ul style="list-style-type: none"> • Advocacy & Communications • Public Relations & Media Relations 	Program Management	Database Management <ul style="list-style-type: none"> • Data Collection • Data Analysis & Reporting 	Financial Management <ul style="list-style-type: none"> • Financial Analysis & Reporting 	Recruitment <ul style="list-style-type: none"> • Training & Pro Development • Diversity, Equity & Inclusion
TASK Discrete activities required to perform these responsibilities/duties	<ul style="list-style-type: none"> • Donor Cultivation • Donor Communication • Donor Stewardship • Donor Data Management 	<ul style="list-style-type: none"> • Mission Definition • Mission: Impact Alignment • Stakeholder Engagement 	<ul style="list-style-type: none"> • Program Planning • Program Design • Program Implementation & Evaluation • Program Communication 	<ul style="list-style-type: none"> • Database Maintenance & Training • Data Privacy and Security • Data Integration 	<ul style="list-style-type: none"> • Financial Processing • Financial Investments • Financial Planning 	<ul style="list-style-type: none"> • Needs/Role Definition • Hiring Management • Onboarding

Perceptions of AI in Grantmaking

Submittable | User Experience Research

Perceptions of AI in Grantmaking

How do grant makers and recipients think about AI?

What are the industry beliefs, concerns, and expectations about AI?

What does 'Responsible AI' meant to grant makers and recipients?



Perceptions of AI in Grantmaking

How do grant makers and recipients think about AI?

1:1 interviews with 5 grant makers & 5 grant seekers

What are the industry beliefs, concerns, and expectations about AI?

Across NPO/Foundations, education, and government

What does 'Responsible AI' meant to grant makers and recipients?

All directly involved in grant writing or distribution



TL;DR

As you might expect, grant makers and applicants are excited about automating tasks with AI, but worry about the loss of human agency in grantmaking.



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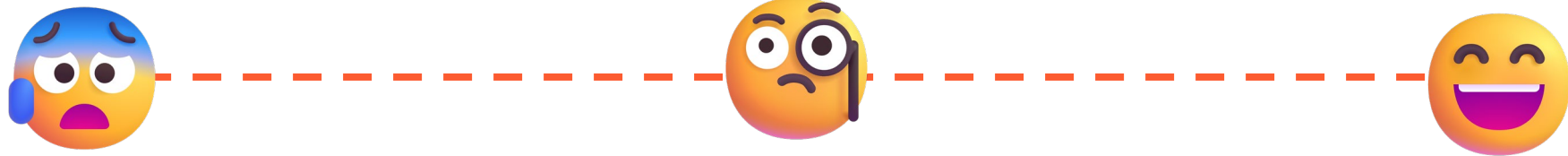
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Shared core fear:

How can I trust that AI will get it right so that critical funding goes to the right place?



Feelings about AI in grantmaking run the gamut



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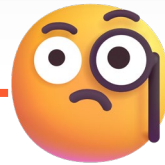


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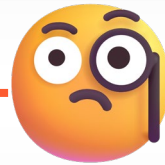
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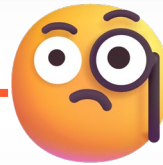


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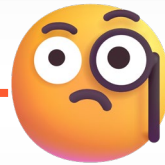


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"I'm still a little scared of AI...I'm afraid of people taking it for what it is rather than using it as a tool"

"It can be a huge help and then occasionally a huge frustration"

"There are a few of us that are on board, diving right in"



Grantmaker Perceptions

Grantors value authenticity in applications

Grantors are cautious about AI-generated or AI-assisted applications because they struggle to assess the authenticity and reliability of their submitters' claims, which is important for grantors to feel confident about their giving



*"I think knowing the difference between the AI and the human is that **we can get a feel for who they are**...Philosophically, we want to make sure that we're investing in organizations that are **actually doing their job versus just having fantastic prompts**.*

Foundation Officer



Grantors want to empower their applicants, but worry about AI misuse

They want to enable their applicants to be as successful as possible, but worry about: accuracy, hallucinations, bias, overreliance, and bad actors. Some are adapting their forms to prepare.



*"Things like 'Where were you founded? 'What was last year's budget?'. That stuff is pretty standard data. **But answering a complex question explaining a program that you're asking for funding for...I'd worry about using AI to answer those questions and fill that out in an accurate and reflective way."***

Executive Director



Government grantors won't adopt AI unless they can explain it

The lack of interpretability in AI tools makes them skeptical about making a case for adoption—they need to be able to explain how AI makes decisions to the public and to their leadership.



*"We are accountable to the public and we have to be able to explain how things work...whatever services we're using, **we need to be able to trust explanations that we're getting about how this works. We'd rather be careful than efficient sometimes**, there's a certain amount of risk involved in letting the computers do the thinking for us"*

State Deputy Director



Grantors are eager for AI to speed up reviewing

They envision AI could take a first pass at reviewing and produce a shortlist or award recommendations, particularly in programs with high applicant volumes.



*"I would have my AI looking for, these **keywords, these key aspects, these data points...that would do some filtering for me** in terms of the initial proposals, that would help alleviate some of that."*

Director



Grantors hope AI can help them make sense of program data & tell a story

They see value in using AI to extract insights from their existing program data for Impact reporting or diagnosing real time issues with their programs, particularly around equity



"Where are the areas that maybe aren't getting as many resources? And then potentially that could be sort of a gap to fill for donors who might want to support a new type of scholarship program. So it's really kind of telling that story"

Foundation Senior Director



Grant Recipient Perceptions

Submitters worry about being overlooked by AI reviewers

They imagine AI might miss critical nuance in their writing and pass on applications based on technicalities, like not using the right keywords or formatting.

//

*"I would hope that the merit wouldn't be erased because **we didn't hit certain things that a bot wants to look for. That's my biggest fear.** That would freak me out"*

*"I would hope that it wouldn't be **relied on as like, a sole tool for evaluating things...**I just would hope that they weren't using it as a replacement for properly, you know, considering applications"*

Senior Grant Writer



Submitters want AI to help them uplevel as grant writers

Grant writing eats up valuable time for submitters—they want AI to help streamline their process and improve the quality of their written applications.



*"If I were to **give AI a very detailed description of what my organization does** and what it's looking for, it would probably be able to assist me...Like me just pasting in a lot of data at once and then just being like "answer this question", "answer this question", **almost chat GPT style** where it kind of formats [it] for you"*

Grants & Research Specialist



Access to AI tools is a key concern for submitters

Who gets access to AI tools? How will AI perpetuate or worsen inequities in grantmaking? How will biases manifest? They want support and training to know they're taking advantage of what it has to offer.



*"I just think that **some people won't have the means to utilize it. Or even the knowledge to do so...** to be fairly honest if I was told that I needed to use AI myself...I could do it, probably very hesitantly"*

Program Specialist



AI can build capacity for under resourced orgs

Both groups ultimately see AI's biggest value in saving time by automating administrative tasks. They want to offload the busy work and focus on the strategic work that matters most.



"People in the nonprofit space are so pressed for time...the biggest benefit of AI into organizations that really can't afford the staffing levels of like a corporate [organization] is in those basic, menial tasks...I think of Chat GPT as my intern"

Director of Strategic Communications



AI can build capacity for under resourced orgs

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Grantmaker use cases:

- Shortlist top applicants in their review process
- Identify potential new applicants
- Send automated reminders about upcoming applicant deadlines
- Build grant programs without having to start from scratch
- Assess program health and create meaningful reports
- Scrape and aggregate data from PDFs



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Grant recipient use cases:

- Craft strong answers to written application questions
- Generate or summarize data that supports their narratives
- Identify grantors that are likely to fund their programs
- Speed up creation of program materials



Responsible AI at Submittable

Smart Import parses critical information from official documents, saving time and increasing accuracy for both applicants and grantors.

Smart Import
Document type: W-2 Wage and Tax Statement
AI will be used to extract necessary information from your document.

1 File Selected

Your W-2 Data
Employee's name, address, and zipcode
Thomas Johnson
194 2nd Street
Missoula, MT 59802

To continue, verify the information above and ensure all required fields have been filled out correctly

[Cancel Editing](#) [Yes, this looks correct](#)

Save applicants time

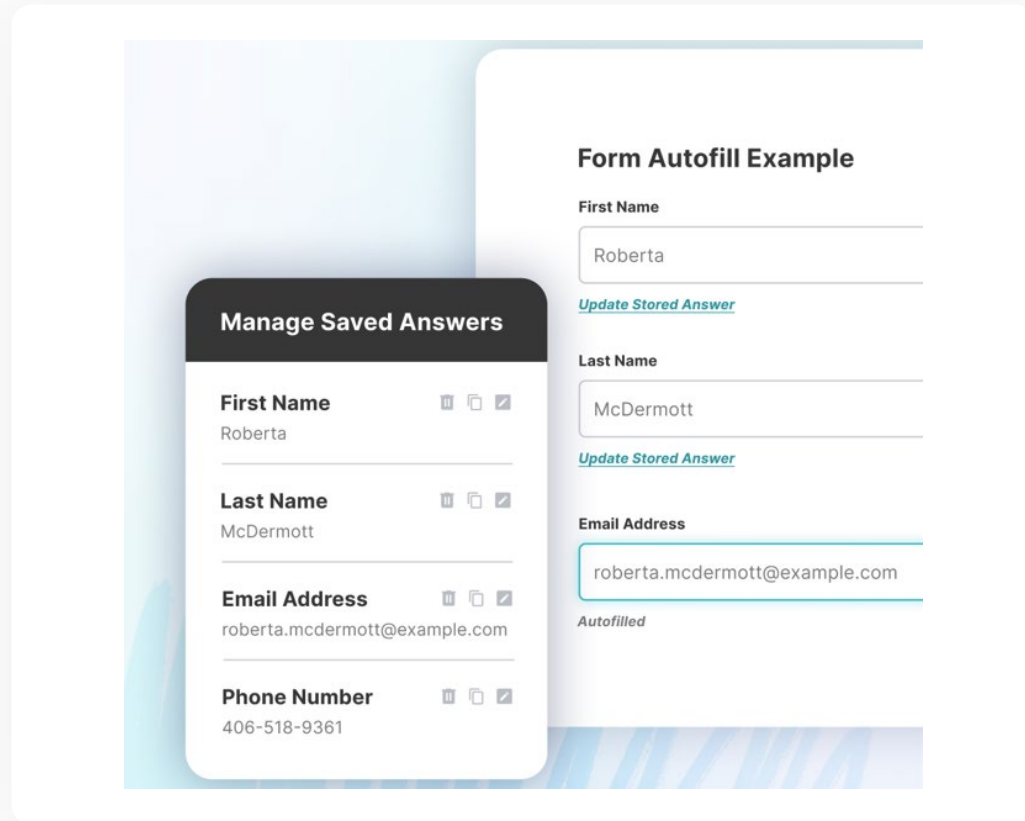
Avoid errors in the review process

Make informed decisions



Responsible AI at Submittable

Grant Form Autofill tracks, stores, and even auto fills answers to grant application questions for future use



Build an answer library

Copy/paste across applications

Auto fill applications



Ways to experiment



“Autopilot”

“Copilot”



Microsoft Copilot

Your everyday **AI companion**

Enterprise-grade security,
privacy, compliance &
responsible AI

You are always in control of
the output

Your universe of data
at work and the web



Prompt 101

Goal

What response do you want from Copilot?

Context

Why do you need it and who is involved?

Generate 3-5 bullet points to prepare me for an introductory meeting with Donor X to discuss their prospective contribution to our capital campaign. Focus on available information from LinkedIn and news articles published in the last year. Please use simple language.

Which information sources or samples should Copilot use?

Source

How should Copilot respond to best meet your expectations?

Expectations

Workday efficiencies



Summarize a long PDF

Turn a 20-page, jargon-filled PDF into 5 bullets using Copilot in the Edge sidebar



Draft emails and social content

Use Copilot as your professional writer on call to draft emails, captions, and more



Generate images

Leave behind stock images and text-only reports in favor of custom-generated images for emails, on social, and more



Learn new skills

Ask questions tailored to your needs and interests to get consolidated key points from the internet for you



Get answers for specific and complex questions

Elegantly handle questions that require multiple data points or a degree of analysis



01 Use the free version of Microsoft Copilot to test out prompts: copilot.microsoft.com

Prompt

Write a tagline for a youth sports initiative.

Response

Where every kid gets in the game

Prompt

Provide a list of youth sports programs in Canada.

Response

Here are a few to start...

Prompt

Thanks! That worked. Can you narrow the list down to Toronto?

Response

Here are a few that you might consider: ...

Prompt

Table donors, columns = [CustomerId, FirstName, LastName, Company, Address, City, State, Country, PostalCode]

Create a SQL query for all donors in Washington state named Jane
query =

Response

```
SELECT *  
  
FROM customers  
  
WHERE State = 'WA' AND  
FirstName = 'Jane'
```

Prompt

A ball of fire with vibrant colors to show the speed of innovation at our youth sports initiative.

Response





Research and planning



Your Scenario:

We are the digital innovation team at an international child rights organization, uniting to craft digital strategies that will captivate and inspire a new generation of donors.



Prompt:

Provide five ideas for a digital fundraising strategy for an international organization that works for child rights, to help us bring in new donors.



You

Provide five ideas for a digital fundraising strategy for an international organization that works for child rights, to help us bring in new donors.



Copilot

Certainly! Here are **five ideas** for a digital fundraising strategy that can help your international organization focused on child rights attract new donors:

1. Assess Your Maturity and Build a Strategy:

- Start by evaluating your current digital fundraising capabilities. Identify the most critical business processes and tools impacting donors and prospects. Understand data exchange between systems and assess your strengths and weaknesses.
- Define clear objectives, processes, and key performance indicators (KPIs) for your digital fundraising strategy. This assessment will provide an overview of your situation and guide your next steps¹.

2. Implement the Fundamentals:

- Create a 360° view of your donors internally. Use a CRM tool to understand donor data, including legacy donors. Centralize data exchange in the CRM system.
- Optimize donor services with a user-friendly interface (UI) for a seamless experience. Ensure painless payment processing for donors using their preferred methods¹.

3. Leverage Social Media and Online Fundraising Techniques:

- Utilize social media platforms to raise awareness. Engage donors through crowdfunding and peer-to-peer fundraising campaigns. Leverage the digital sphere to reach a wider audience².

4. Personalize Communication:

- Segment your donor base based on demographics, interests, and giving history. Send personalized emails and messages to connect with donors on a deeper level.

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- Segment your donor base based on demographics, interests, and giving history. Send personalized emails and messages to connect with donors on a deeper level.
- Tailor your communication to resonate with their specific interests in child rights and the impact of their contributions³.

5. Create Engaging Content:

- Develop compelling stories, videos, and visuals that highlight the organization's impact. Showcase success stories related to child rights.
- Regularly update your website and social media channels with fresh content to keep donors engaged and informed⁴.

Remember that consistency, transparency, and building trust are essential in any digital fundraising strategy.

Good luck with your efforts to make a positive impact on child rights! 🌞💖¹³⁴²

Related to: digital fundraising strategy for child rights international organization

Ads ⓘ

ChildFund International | Change A Child's Life Today

Every child has dreams for the future. Your donation can help make them reality. Somewhere in the world, a child could use a supportive friend like you. Donate today.

<https://www.childfund.org/donate>

Learn more ¹ [elca.ch](#) ² [donorbox.org](#) ³ [charitycharge.com](#) ⁴ [nonprofitHub.org](#)



How can I improve donor retention?

What are some successful examples of digital fundraising campaigns?

Can you provide more details on segmenting donors?



New topic

Ask me anything...



New topic

Ask me anything...





Marketing



Scenario:

Our org wants to send emails to first-time donors that supported our fundraising auction.



Prompt:

Write a donor-centric thank-you email to first-time donors for contributing to the fundraising auction on Tuesday, May 21, 2024. Include the following details: the donation will help create a new shelter for animals, which will help Pets4All treat more than 200 rescues in Missouri. Keep the tone grateful and make sure it doesn't exceed 100 words.



You

Write a donor-centric thank-you email to first-time donors for contributing to the fundraising auction on Tuesday, May 21, 2024. Include the following details: the donation will help create a new shelter for animals, which will help Pets4All treat more than 200 rescues in Missouri. Keep the tone grateful and make sure it doesn't exceed 100 words.



Copilot

Subject: Thank You for Your Generosity!

Dear [Donor's Name],

We are thrilled to express our heartfelt gratitude for your first-time donation to our fundraising auction. Your contribution will directly impact the lives of over 200 rescued animals in Missouri by helping us build a new shelter. 🐾

Thank you for being a part of our mission to provide love, care, and hope to these precious creatures. Your kindness makes a world of difference!

Warm regards, [Your Name] Pets4All Team



That's perfect! Thank you!

Can you add a call-to-action?

I'd like to see another version.



Ask me anything...





Data analysis



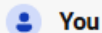
Scenario:

We want to increase our donor base and donor engagement score and conduct three fundraisers. We need KPIs to track our progress.



Prompt:

Establish key performance indicators (KPIs) for a fundraising team with the following goals: Increase donor base from 200 to 1,000 donors, conduct three fundraisers to raise over \$50,000, increase donor engagement score from 2% to 5%. Present results in a table.



You

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Copilot

Certainly! Let's create a table with relevant KPIs for your fundraising team based on the goals you've outlined:

Table	
KPI	Target
Donor Acquisition Rate	Acquire new donors steadily
Donor Lapse Rate	Minimize donor attrition
Average Gift Size Growth	Increase average donation
Fundraising ROI	Optimize return on investment
Donor Retention Rate	Retain existing donors
Number of Meaningful Interactions	Foster donor engagement

Here's a brief explanation of each KPI:

- Donor Acquisition Rate:** Measure the percentage of new donors acquired within a specific period (e.g., monthly, quarterly, annually). Aim to improve this rate over time.
- Donor Lapse Rate:** Calculate the percentage of donors who haven't given again within a certain timeframe (usually one year). Lower lapse rates indicate better donor retention.
- Average Gift Size Growth:** Track the average donation amount and work towards increasing it.



Ask me anything...



Donor Acquisition Rate

Acquire new donors steadily

Donor Lapse Rate

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Average Gift Size Growth

Increase average donation

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- Average Gift Size Growth:** Track the average donation amount and work towards increasing it.
- Fundraising ROI:** Evaluate the return on investment for your fundraising efforts. Compare the funds raised to the costs incurred.
- Donor Retention Rate:** Focus on retaining existing donors by implementing effective stewardship activities.
- Number of Meaningful Interactions:** Engage donors through personalized interactions, events, and communication.

Remember that these KPIs should align with your specific goals and organizational context ¹ ² ³. Feel free to adjust them as needed! 😊

Learn more [1](#) [garecht.com](#) [2](#) [topnonprofits.com](#) [3](#) [aperiophilanthropy.com](#) [4](#) [callhub.io](#) [+1 more](#)



Thank you! Can you provide more details on how to calculate each KPI?

How can I track donor engagement score?

What strategies can help achieve these goals?



New topic

Ask me anything...



02 Start learning with the Nonprofit Digital Skills Center with TechSoup



We provide training and learning paths so employees can build their skills and organizations can drive greater impact with technology.



>60% of nonprofit orgs say they need improved IT training

We believe that improved use of Microsoft products by nonprofits will lead to improved mission outcomes



TechSoup Courses provides **the platform, reach, and methodology** to deliver this training



Get started at aka.ms/MicrosoftDigitalSkillsCenter

Get started with AI

Find information at work easily via a quick online search with Microsoft Copilot. Free for Microsoft 365 Business Premium users, Copilot includes additional controls, customization, and secure enterprise features: copilot.microsoft.com

Accelerate your AI fluency with our free learning pathways: aka.ms/MicrosoftDigitalSkillsCenter

Improve your team's productivity and accelerate creativity when you add Microsoft Copilot for Microsoft 365 to your existing Microsoft 365 plan: aka.ms/AmplifyCreativity



Q&A

Ready to make technology work for your mission?

Microsoft Tech for Social Impact is committed to delivering affordable and innovative cloud solutions to help nonprofits tackle the world's biggest challenges.

- Access grants and discounts across our cloud products: aka.ms/nonprofits

Thank you

Microsoft.com/nonprofits

