

CharityEngine: An All-in-One Nonprofit CRM

- All data and tools in one place
- One scalable platform to learn
- 100% privately owned and self-funded



Fundraising AI with CharityEngine

- Recommended Outreach
- Gift Probability Scoring
- Smarter Ask Amounts
- AI Writing Assistant
- Intelligent Payment Recovery
- Credit Card Updater
- Fraud Protection

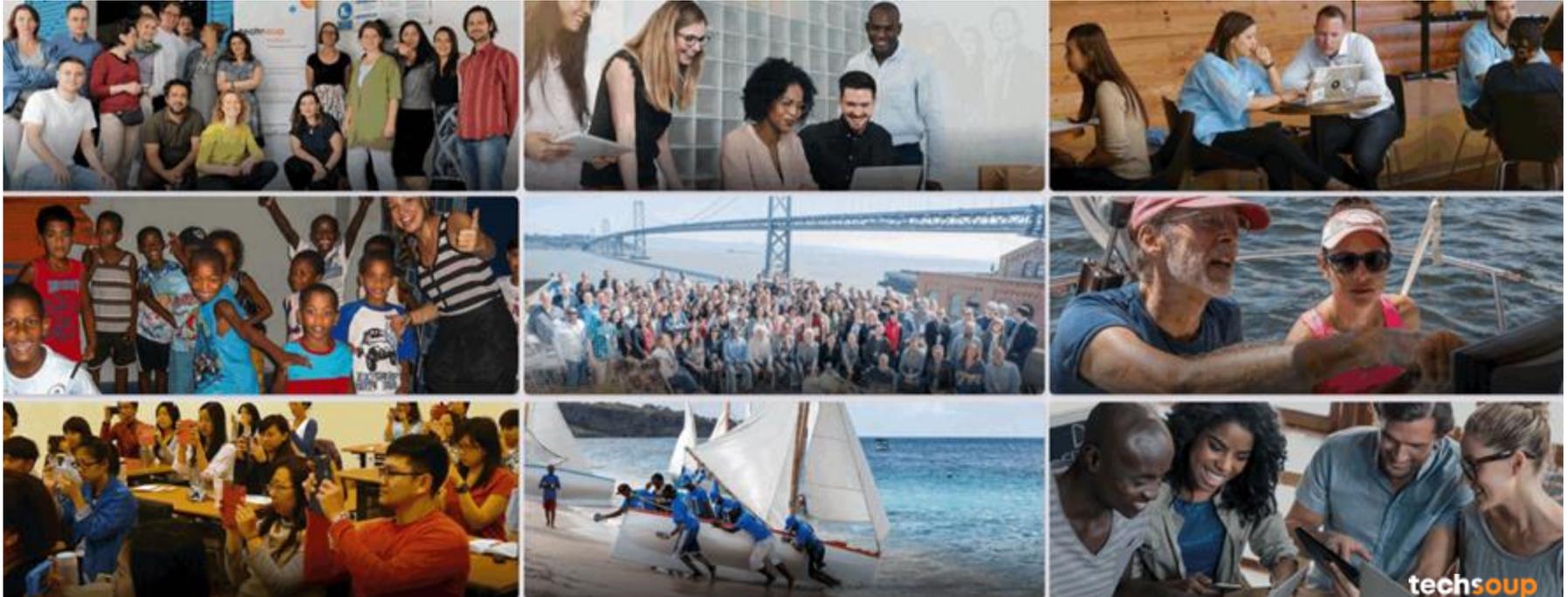


AI Without the Anxiety: Practical Ways Nonprofits Can Get Started

Today's Goals

- Understand how to leverage AI tools to reduce busywork, increase productivity, without sacrificing your uniqueness, voice, and the trust of your donors
- Leave you with examples that you can start using this week
- Learn steps to take to protect your data and use AI tools safely

TechSoup equips changemakers with **transformative technology solutions and skills** they need to improve lives globally & locally.



TechSoup helps build capabilities of the global nonprofit sector

ENABLES

100+ leading technology companies and 400+ foundations to achieve scale and deliver **\$27 Billion** in retail value to the global nonprofit sector.

PROVIDES

Technology training, solutions and education to **1.6 MILLION** resource constrained nonprofits.

CONNECTS

the data of civil society across the globe and sectors.

TechSoup extends resource contributions by supporting organizations at scale:



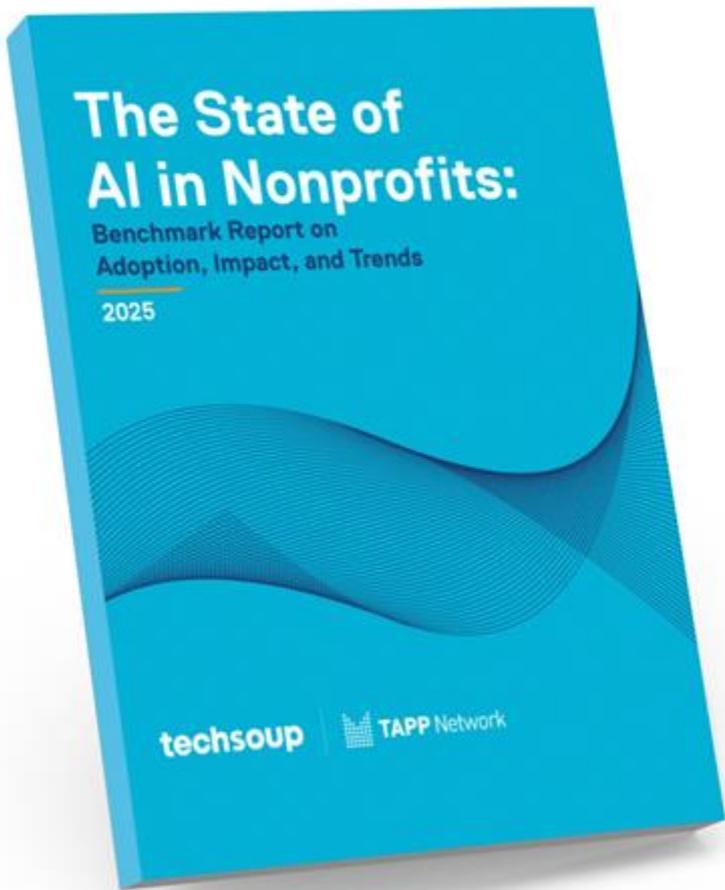
Tech-Enabled



Resilient



Efficient



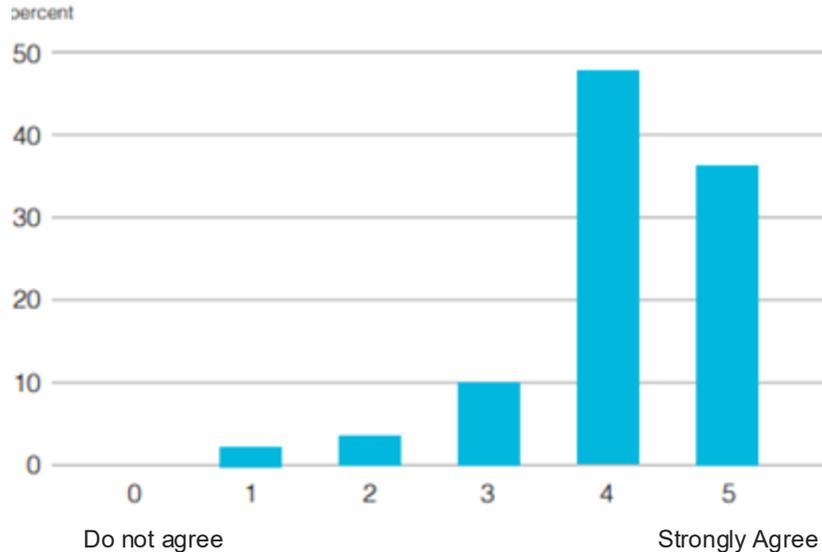
TechSoup & TAPP Network conducted a survey to over 1,500 U.S. nonprofits to gain insights into how nonprofits are using AI, the challenges they are facing and their hopes and concerns about this technology.

50% of nonprofit workers are already leveraging AI tools in their work.



Nonprofits are **enthusiastic** and **optimistic** about future AI Adoption.

AI can help nonprofits be more efficient, productive, and effective



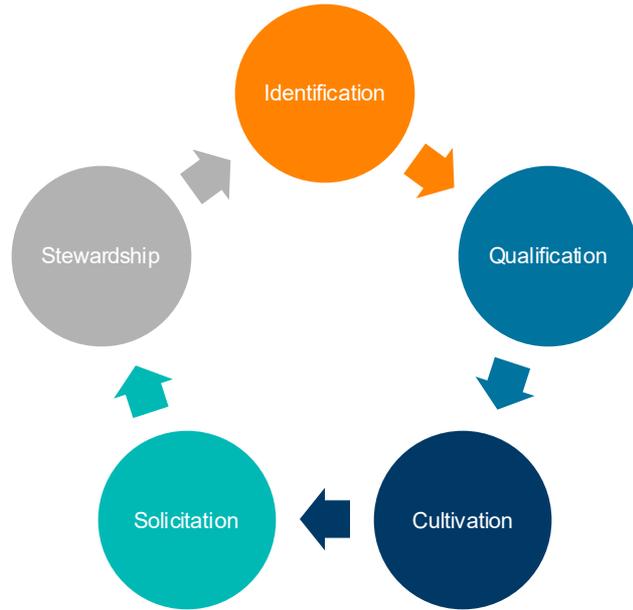
- **Grant Writing Assistance** 71% of respondents see AI as a valuable tool for streamlining the grant writing process, reducing the time and effort required, and increasing the chances of securing funding.
- **Fundraising Optimization** 66% of respondents believe AI can provide data-driven insights and strategies to enhance fundraising efforts, making it an attractive option for nonprofits looking to maximize their fundraising potential.
- **Social Media and Marketing Automation** 66% of respondents believe AI can help nonprofits manage their social media presence more efficiently, allowing for consistent and targeted engagement with their audience, which is crucial for visibility and outreach.



How can we use AI enabled tools in fundraising?



AI tools can support each area of the fundraising cycle to be more efficient and productive.



Donor Communications



Personalization



Planning



Analysis

Donor Communications: Get a solid first draft for your donor communications with the aid of a Generative AI tool.

A few key things to remember:

- Context (Who is your audience, What is the goal of your communication, What references do you have)
- Voice (Tone, Examples, References)
- Constraints (What are things that must be true)
- Output format (Email, Bullets, Talking Points, Graphic)

Personalization: Take your first draft and craft it specifically for a donor.

A few key things to remember:

- Context (Who is your audience, What is the goal of your communication, What references do you have)
- Voice (Tone, Examples, References)
- Constraints (What are things that must be true)
- Output format (Email, Bullets, Talking Points, Graphic)

Planning: Help me plan a fundraising campaign?

A few key things to remember:

- The more context, the better
- Keep asking questions
- Refine, probe, and say what's not working

Analysis: What are some trends in the grant data and how should I think about future grants given this?

A few key things to remember:

- The systems learn
- The more relevant the data, the better the learnings
- Safety and security matter!

Tools Available & How to Think about What to Pay for



Tools Available

- General assistants (meeting tools)
- Workplace copilots (within your workspace)
- Automation & agents (moving across systems)



When To Pay

- When you are using your sensitive work account
- Ensuring data is analysis, data, and outputs are kept private
- Security
- Additional Features (repeatable flows)

Despite a high interest in individual productivity tools, organizations do not have AI strategy or formal policy to support their teams.

This presents challenges in:

- Security
- Collaboration
- Cost-Savings across the organization

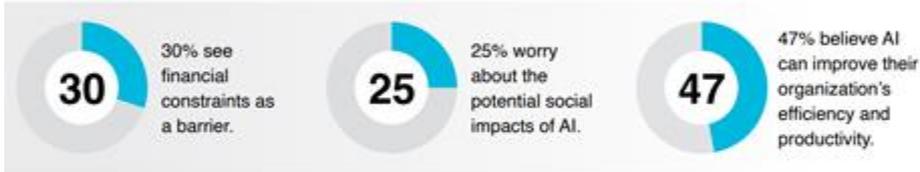
A need for AI strategy

While interest in AI is growing, most nonprofits lack a clear path forward:

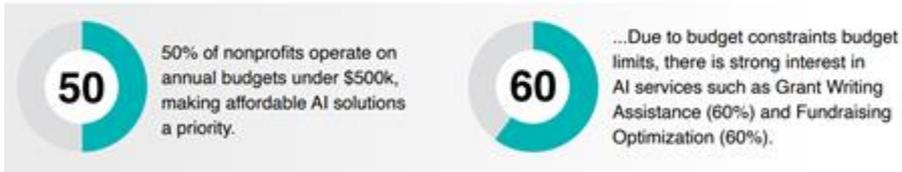


Financial concerns are a key barrier

Many nonprofits are concerned about the cost of AI:



Budget constraints



Decision-making around AI



Trust is the currency of nonprofits. Make sure you are not risking this in leveraging AI.

- Donor privacy boundaries
- Human review before sending
- Source-of-truth fact checking
- Bias + inclusion check
- Disclosure policy (when needed)
- Approved tool list + training

EXAMPLES OF AI USAGE POLICIES

TechSoup AI Usage Policy:

[Download the policy here \(PDF\)](#)

Microsoft AI Tools and Resources:

[Responsible AI Tools and Practices](#)

AI USAGE POLICY TEMPLATE

How to Use the Template

You will need to customize this template in order to use it for your organization. We have included spaces for you to enter your organization's name, contact details, and any other customizable information.

Feel free to include additional principles or utilization guidelines or remove those that are not relevant to your work.

[Click here to download the template and create your own AI Usage Policy.](#)



BLOG

Case Study: Nonprofits Leveraging Microsoft 365 Copilot for Impact

This case study outlines how three TechSoup nonprofits used Microsoft 365 Copilot to automate administrative tasks, help write grant applications, and optimize communication.



VIDEO

AI for Nonprofits: Unlocking Generative AI and Microsoft Copilot for Impact

Dive into the essentials of generative AI, address key AI concerns, and see demonstrations of how nonprofits can use Microsoft's AI assistant, Copilot, to achieve their goals.



VIDEO

AI for Nonprofits Part 2: Hands On with Microsoft 365 Copilot — Use Cases & Demo

In part 2 of this webinar series we move beyond essential AI features and concerns, and see the demo of Copilot in action.



WEBINAR

AI for Nonprofits: What You Need to Know

Learn more about the latest generation of AI and how nonprofits can use it to their advantage.



WEBINAR

Ask the Experts: Focus on Ethics, Principles, and Governance of Generative AI

Learn how to integrate AI into your organization's workflow safely and transparently.



WEBINAR

Ask the Experts: Focus on AI Prompt Engineering

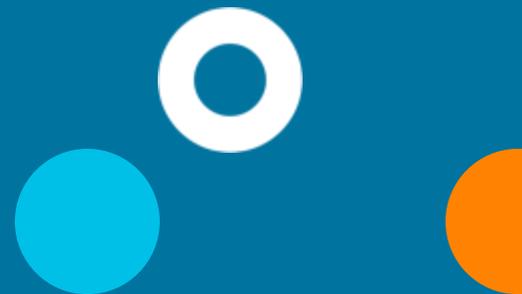
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Questions!



Thank you!



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