

POSSIBLE (RE)DEFINED

Demystifying AI & Automation for Nonprofits

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WELCOME

Today's Presenters



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EXPLORING NEW AREAS

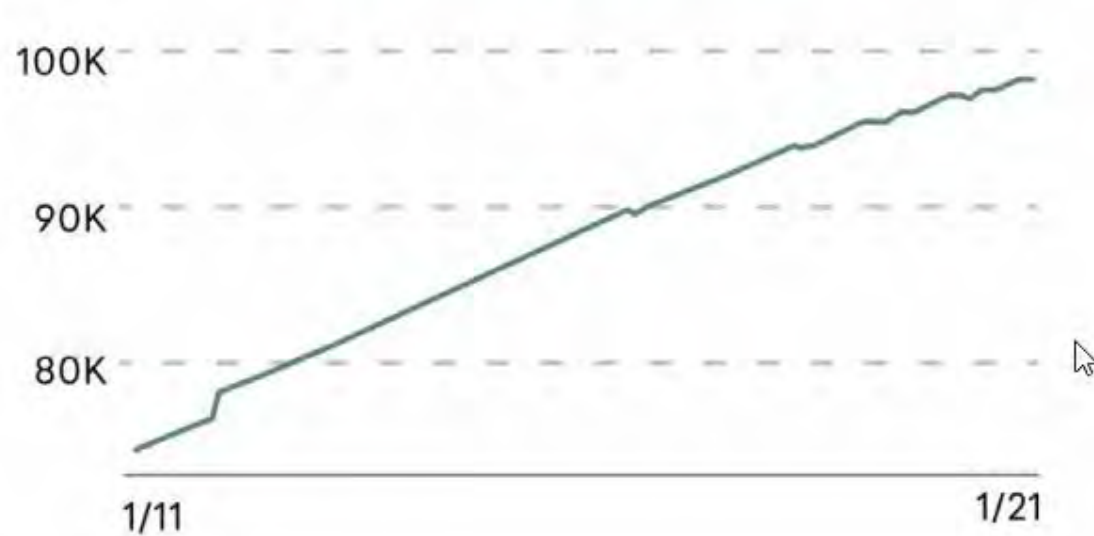
Agenda

- **Current State**
 - ❖ Labor Market & Nonprofit Sector Trends
 - ❖ Future of Work – The Integrated Work Force
- **Automation**
 - ❖ What is RPA?
 - ❖ Use Cases
 - ❖ Demo
- **Artificial Intelligence**
 - ❖ What is Generative AI?
 - ❖ Use Cases
 - ❖ Demo

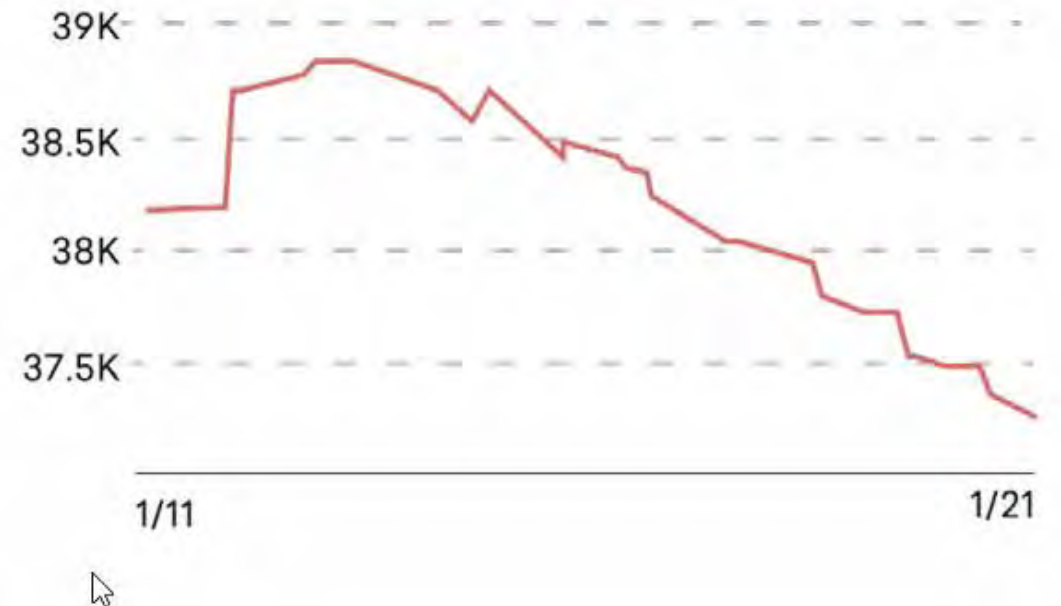
WHAT'S HAPPENING

Demographic Drought

55+ Imminent retirees



16-24 entering workforce



U.S. Yearly Immigration Numbers Have Fallen to New Record Lows



Sources: U.S. Census Bureau, Vintage 2021 Population Estimates.

Immigrant visas issued / New arrivals of legal permanent residents from abroad

We Need 3.2 Million More Workers to Get Back on Track



Source: Bureau of Labor Statistics, Current Population Survey, Seasonally Adjusted: February 2022

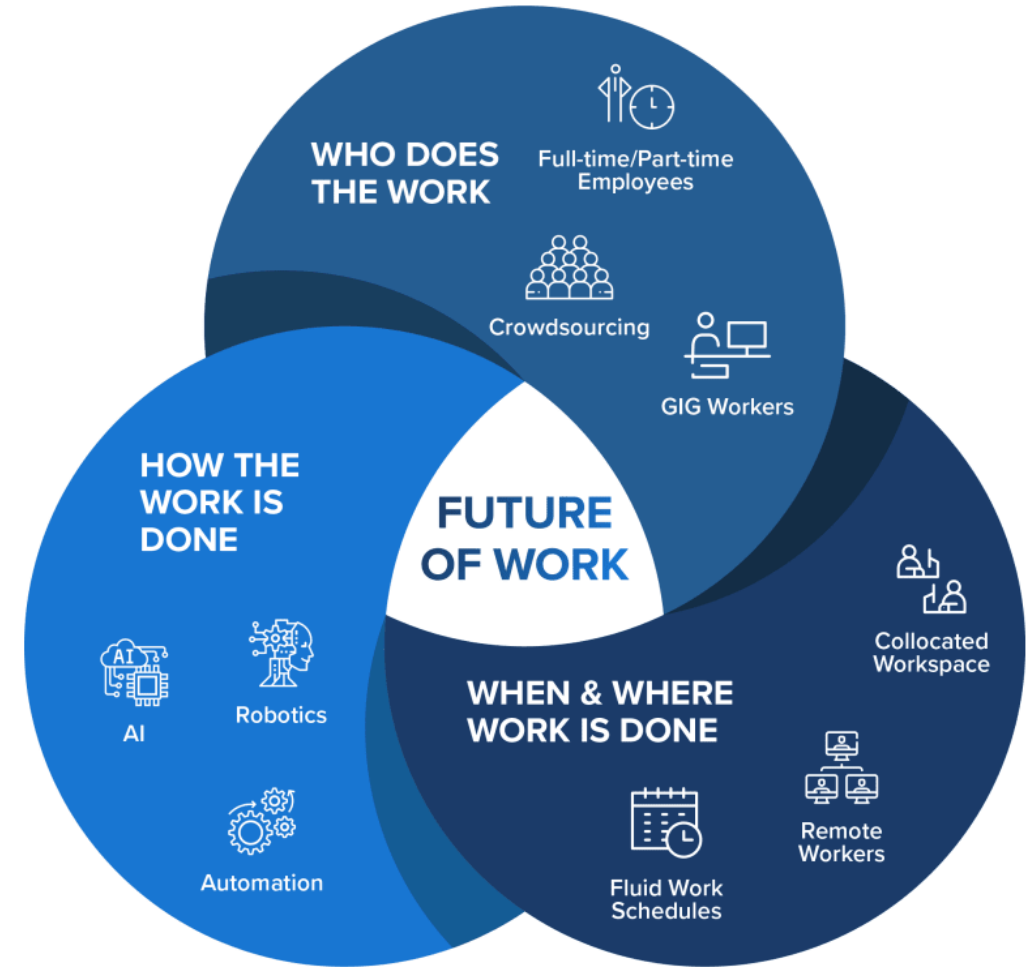
WHAT'S HAPPENING

The Changing Labor Market

“By 2025 ‘labor volatility’ will cause **40% of organizations** to report a material business loss.”

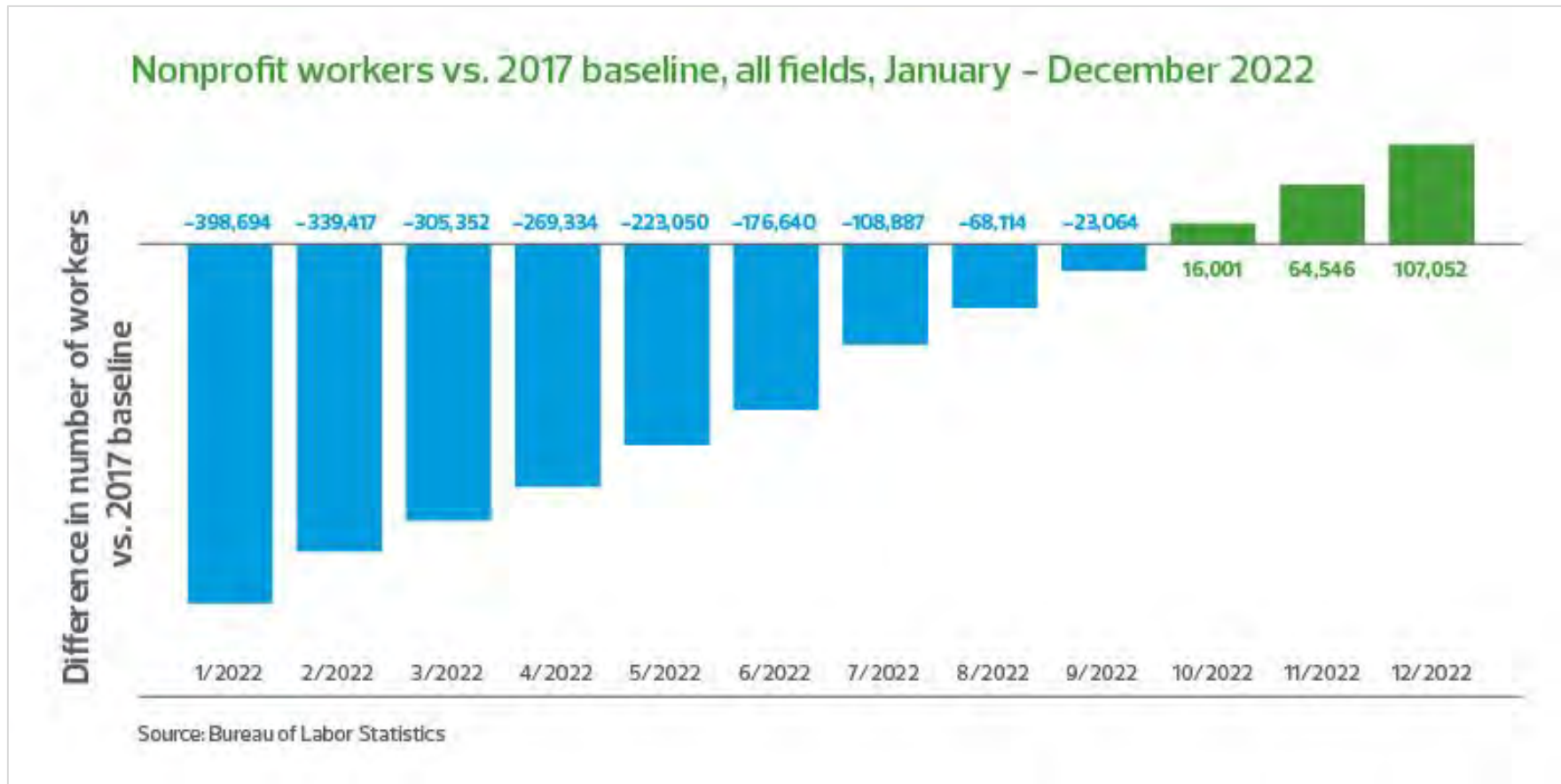
“**91%** of employees are frustrated with work tech, and **57%** feel legacy tech is holding them back”

Freshwork [State Of WorkPlace Technology Report](#)

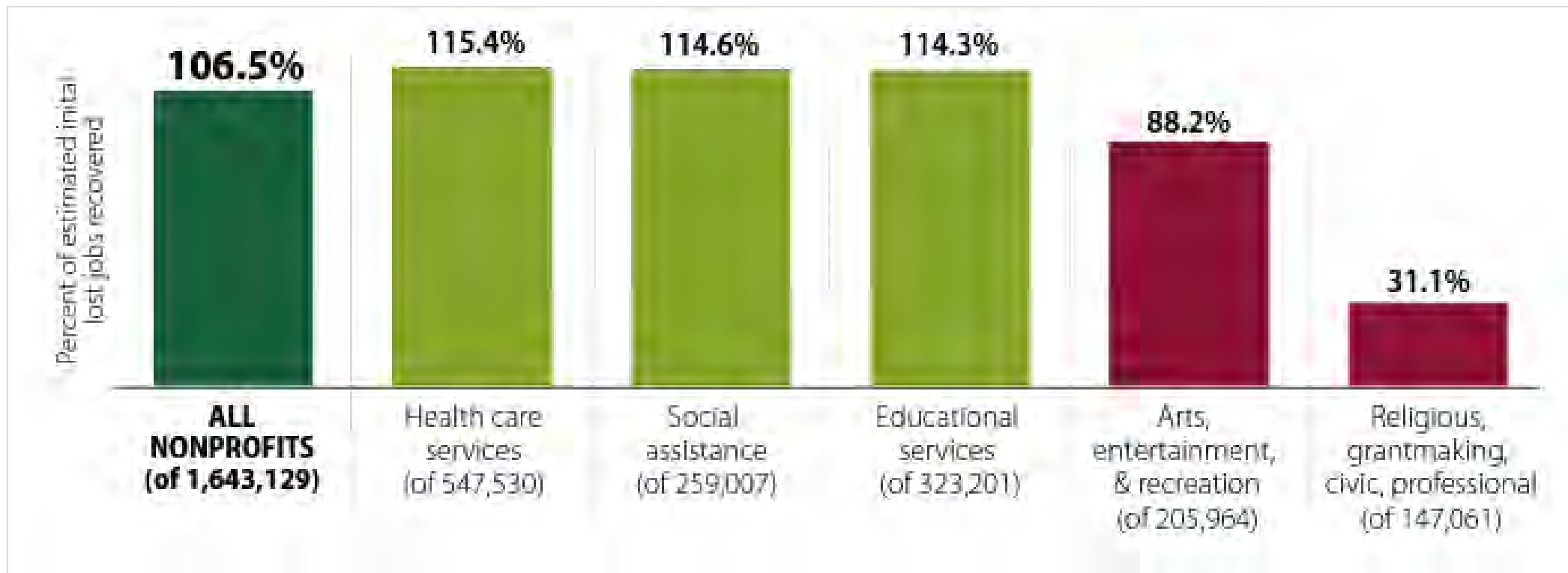


Today, millions of knowledge workers have greater freedom to decide when and where they work. (Image Source: shrm.org)

The nonprofit labor market is finally recovering. After losing **1.6 million jobs** (13.2% of work force) in 2020, **100,000 jobs** have been added since the pre-pandemic highs in 2017.



Cumulative percentage of initial job losses recovered through December 2022, by field



George Mason University – Nonprofit Employment Data Project (January 2023)

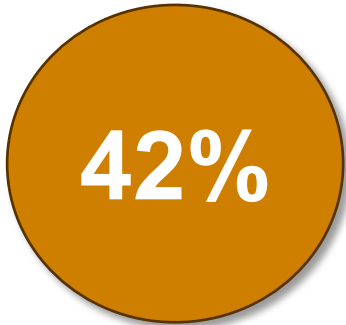
Change in number of nonprofit jobs as of December 2022 vs 2017 baseline, by field



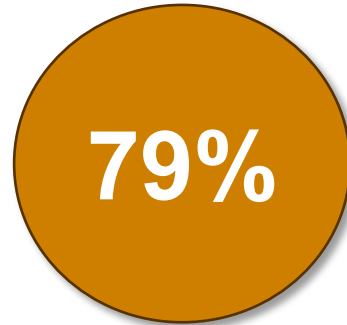
George Mason University – Nonprofit Employment Data Project (January 2023)

NONPROFIT TRENDS

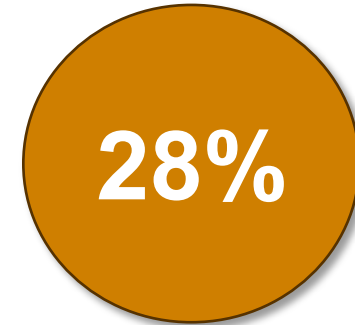
Staffing Challenges Remain



of nonprofits nationwide have a **vacancy rate of 20% or higher***



of nonprofits identify **salary competition** as a factor preventing them from filling job openings*



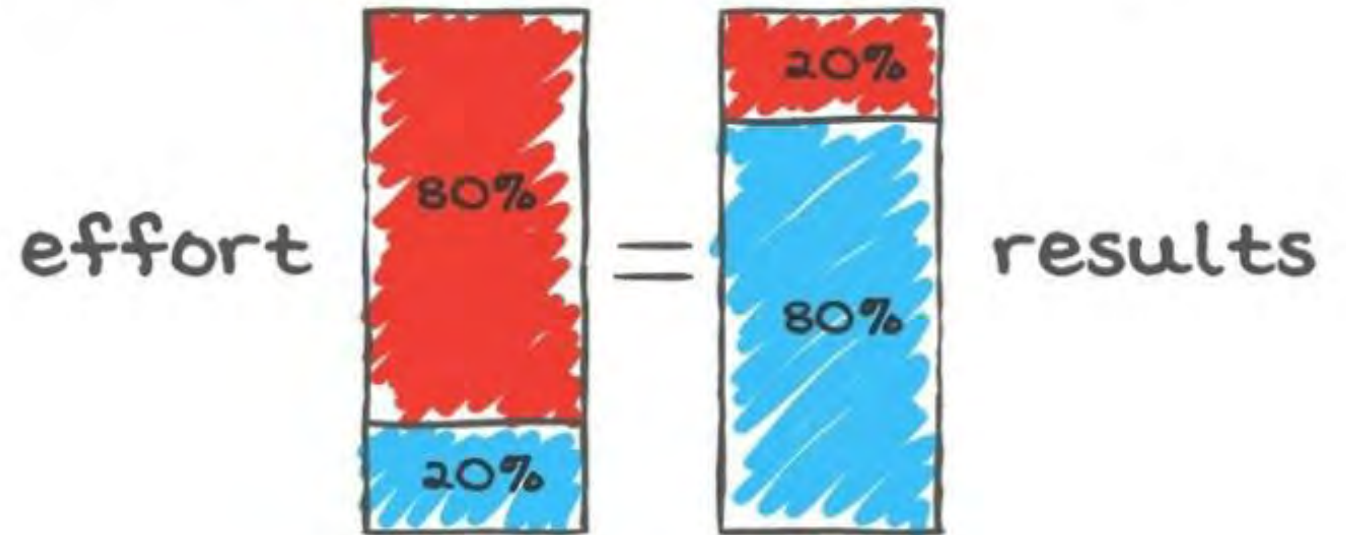
of nonprofits report **staff retention** as a challenge**

*National Council of Nonprofits

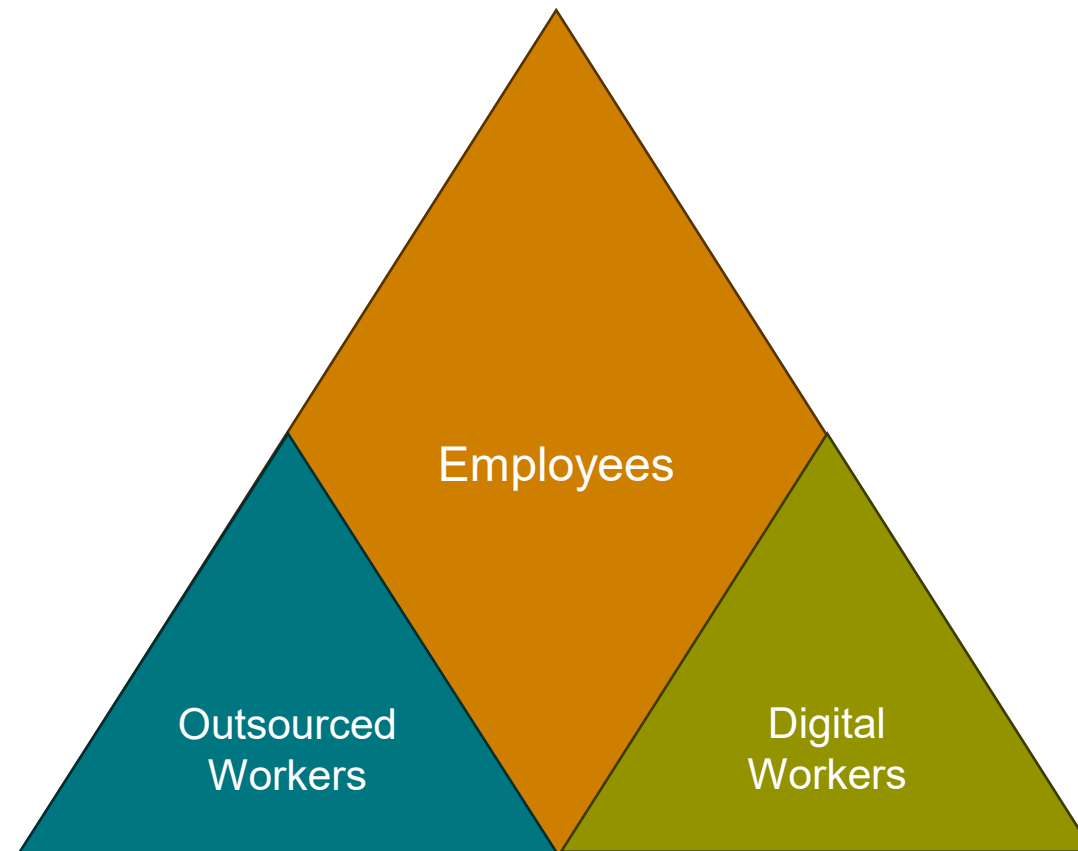
**Salesforce 2022 Nonprofit Trends Report

What
Should You
Automate?

The Pareto Principle



Integrated Workforce



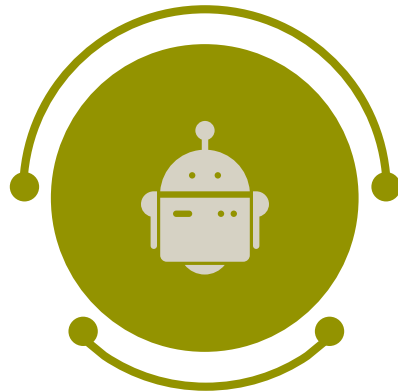


RPA
Automation

What is Robotic Process Automation (RPA)?



Configurations That Automate Manual and Repetitive Tasks



Digital Workers That Integrate With Existing Software

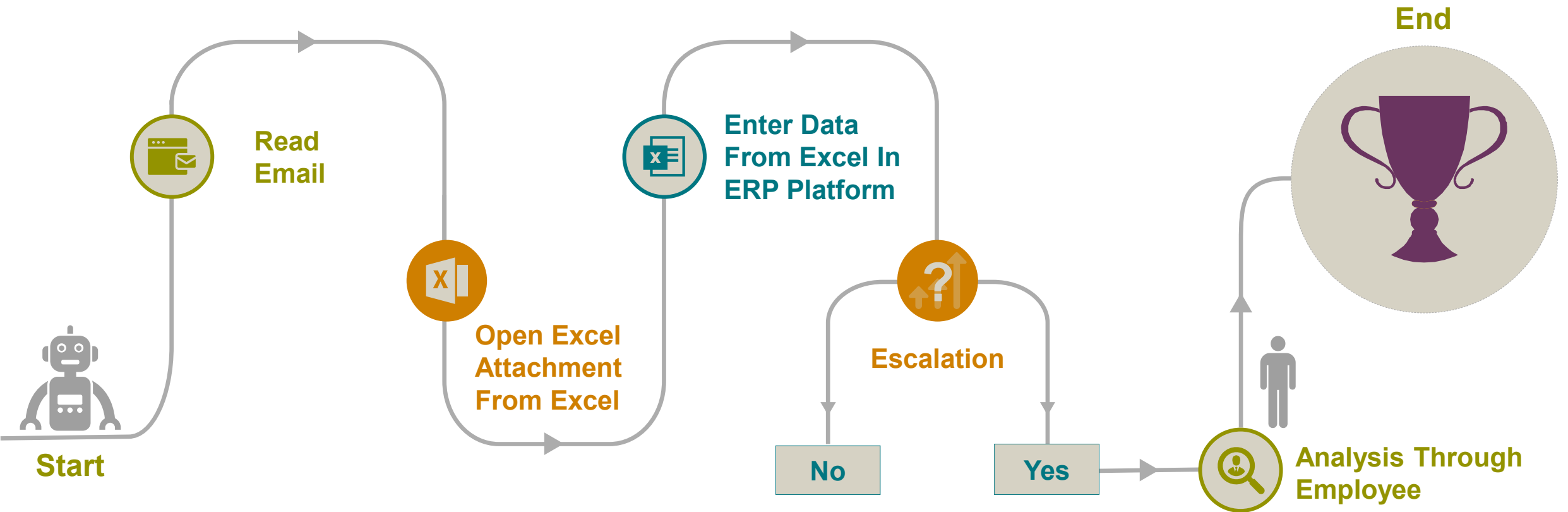


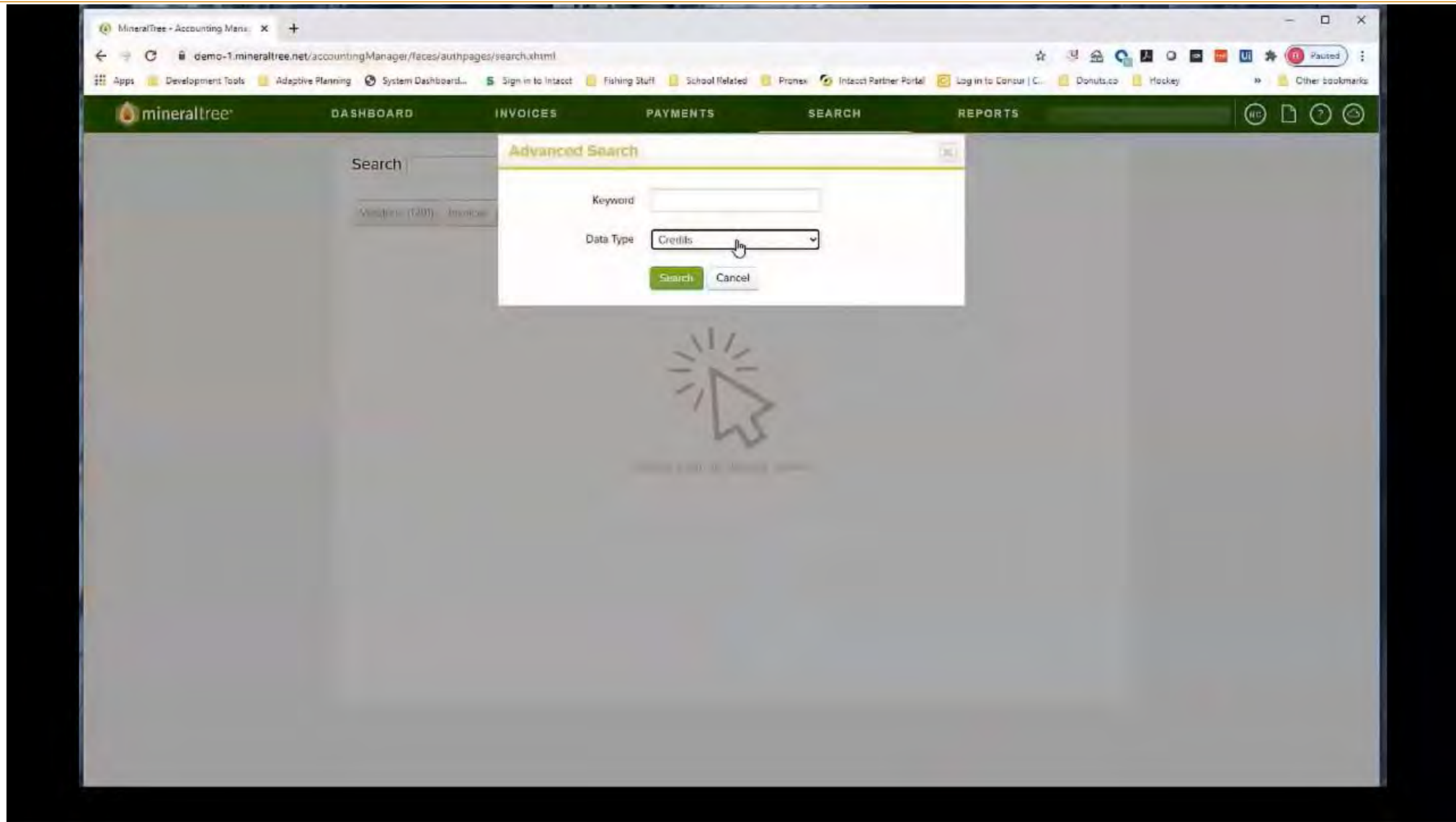
Replication Of Desktop Actions



Driven By Simple Rules And Business Logic

How Does RPA Work?

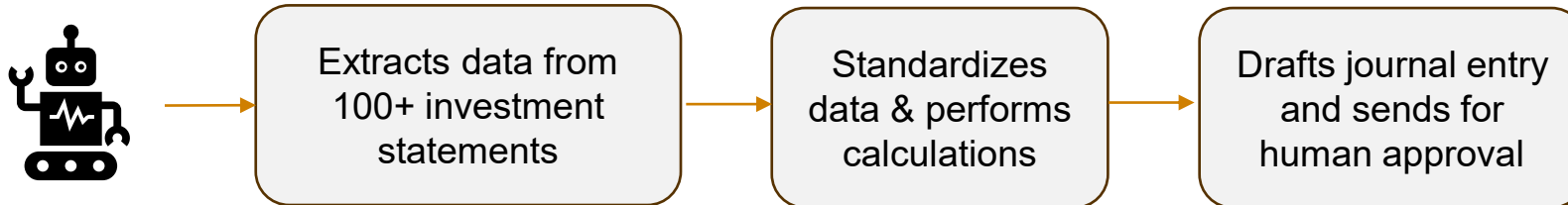




RPA IN ACTION

Nonprofit Case Study

A large nonprofit foundation utilizes automation to summarize monthly and quarterly investment activities more efficiently and cost-effectively



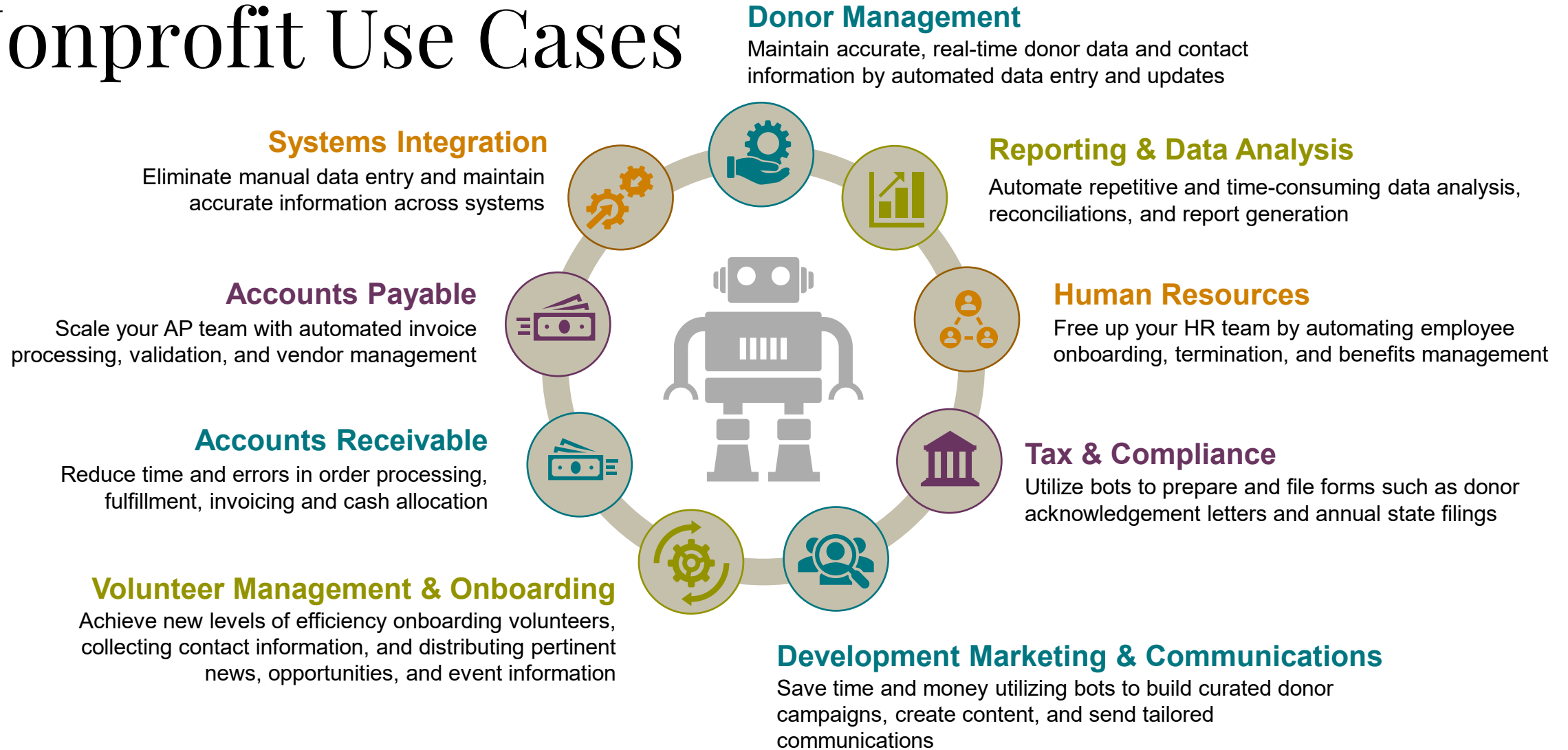
Eliminated **500+ hours / year** of manual data processing for one team member

“I’ve never seen our Accounting Manager smile this big.”

– VP of Finance & Accounting

[Read the full case study on the Armanino website!](#)

Nonprofit Use Cases



Why Automation?



Reduce Manual Data Entry & Errors

Improve accuracy and quality with less human data entry errors or typos



Increase Productivity

Process cycle times are much faster compared to manual process approaches



Integrate & Sustain Legacy Systems

Integrate legacy systems with each other when traditional means, such as open APIs, are unavailable



Increase Availability

Digital workers operate on a regular, established schedule up to 24/7



Improve Employee Morale

Reduce tedious, painstaking tasks. Allow employees to focus more on rewarding work and the strategic growth of the organization

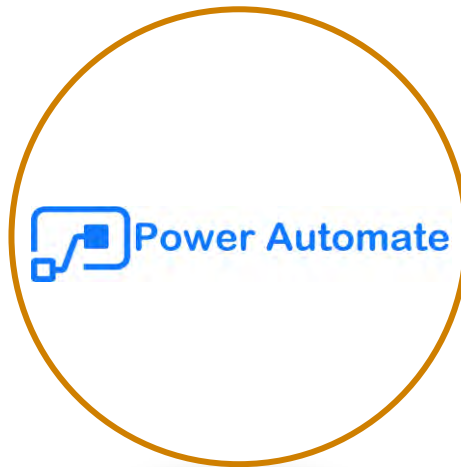


Scale & Manage Expenses

Scale without needing to add headcount. Reduce operating expenses through headcount reduction.

TECHNOLOGY PROVIDERS

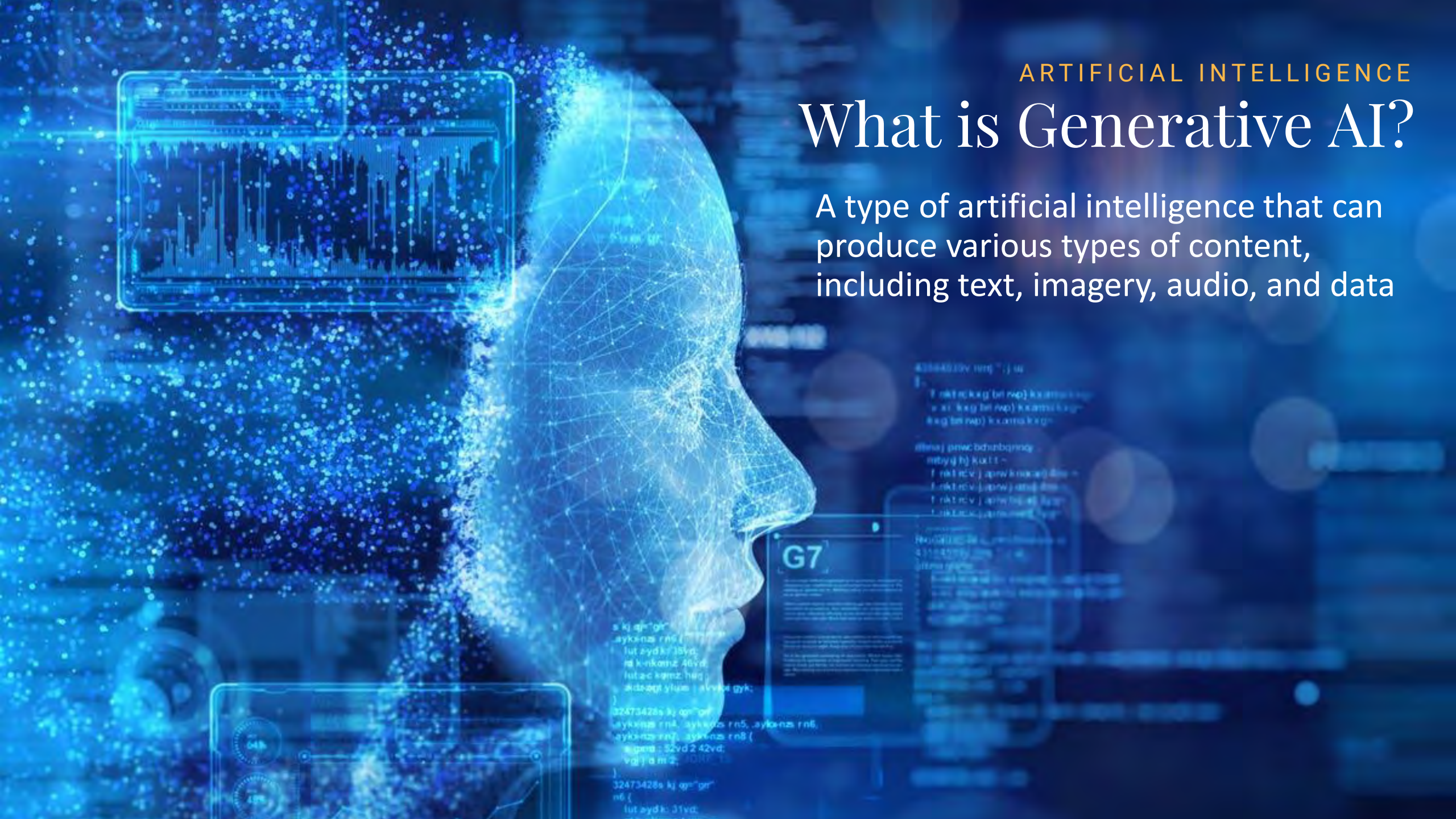
Leading Automation Platforms



ARTIFICIAL INTELLIGENCE

What is Generative AI?

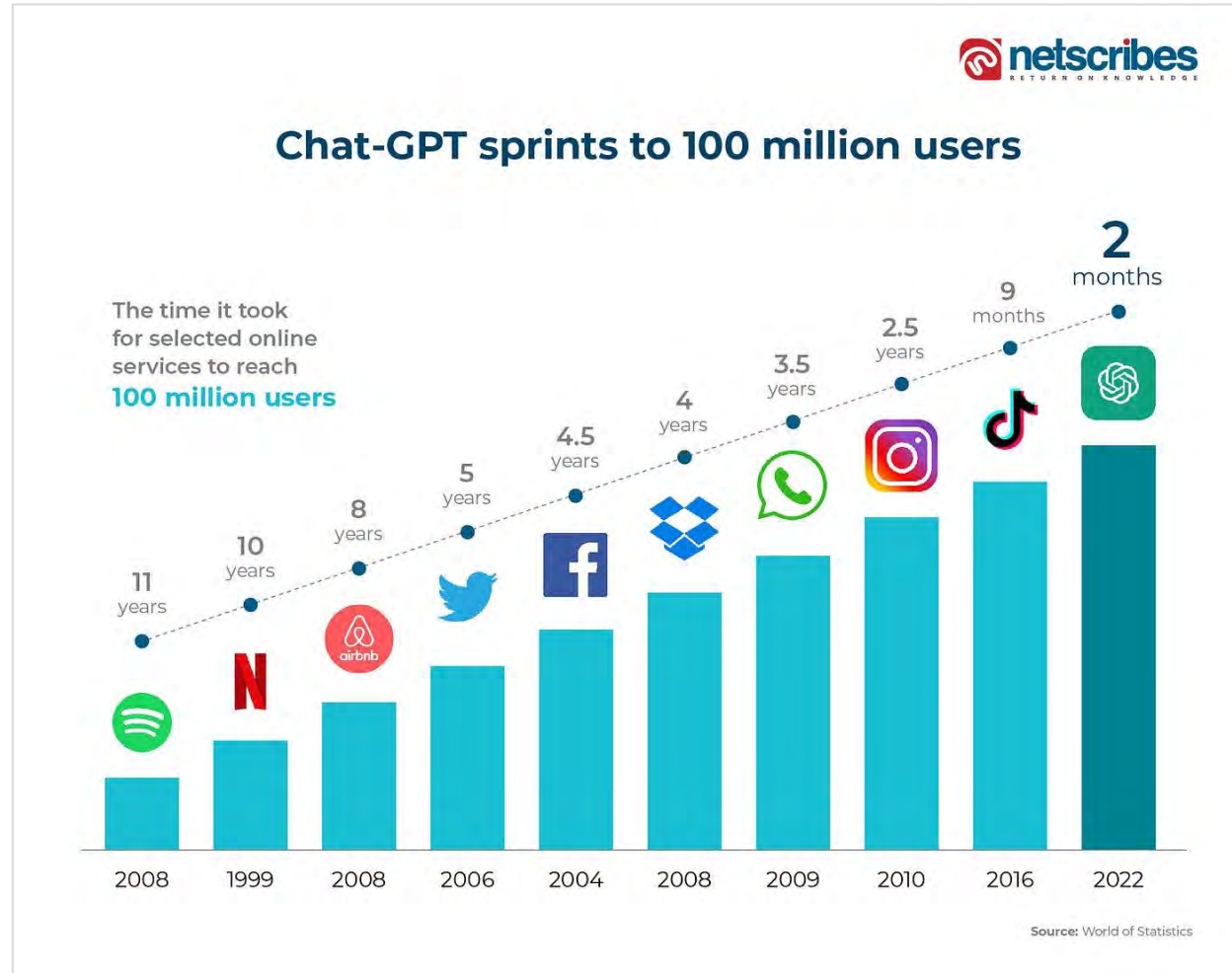
A type of artificial intelligence that can produce various types of content, including text, imagery, audio, and data

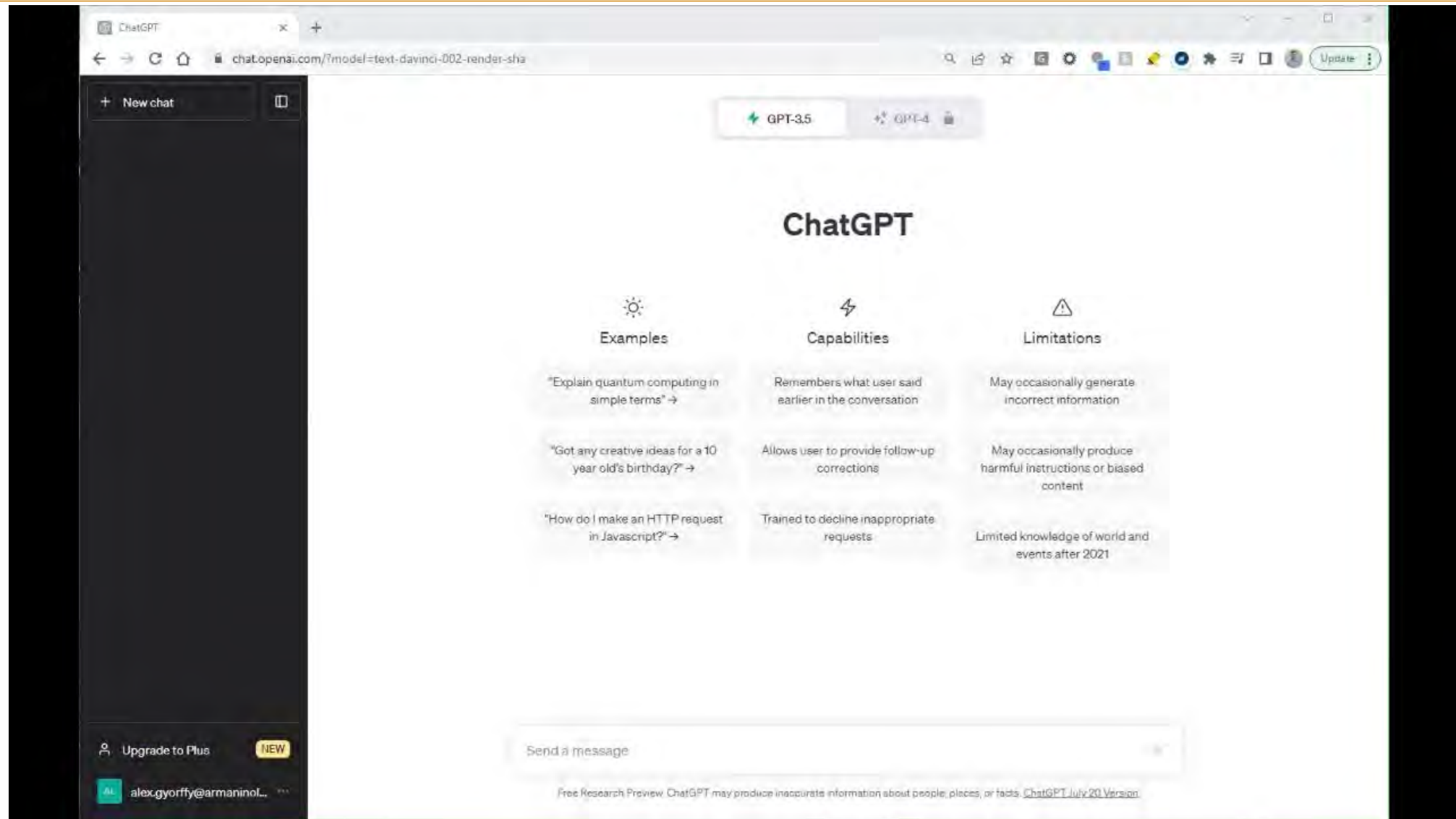


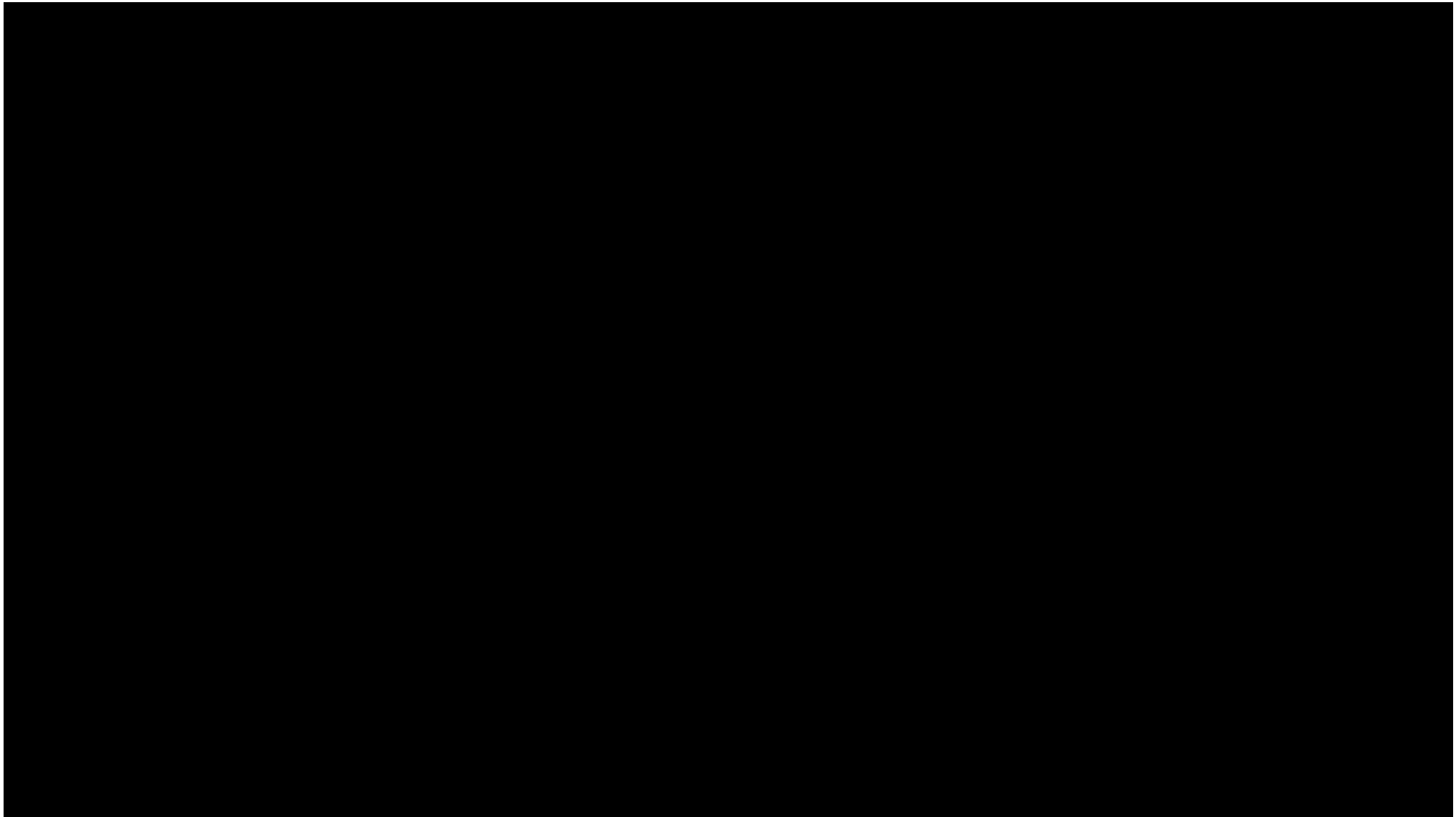
ChatGPT was the fastest growing technology ever, reaching **100 million** active users in just **2 months**

Why?

- Accessibility
- Human-like Conversations
- General Knowledge







JUST TO NAME A FEW...

Generative AI: Nonprofit Use Cases

Human Resources

- Create job descriptions
- Generate interview questions
- Summarize applicant resumes & credentials
- Draft HR policies and documentation, Q&A for employees

Marketing

- Create content: social media posts, blogs, press releases, newsletters, eBrochures, impact reports, and web site content
- Text-to-video - AI generated professional video content
- Market research and analysis of public sentiment
- AI-enabled chatbot on website

Donor & Volunteer Communications

- Copywriting for personalized donor communications and campaigns
- Volunteer communications (event details, instructions, policies, thank yous)

Productivity

- Language Translation
- Summarize meeting notes and actions
- Generate project plans and weekly status reports
- Internal knowledge base and training
- Summarize documents
- Data analysis
- Software development

GUIDING PRINCIPLES TO GET STARTED

Accelerating Digital Transformation

- Start small & experiment
- Be intentional selecting and qualifying AI & automation opportunities
- Set goals, measure impact
- Select the right technology platform(s)
- Leverage AI, automation, and productivity features in your existing technology stack
- When in doubt, call in an expert

You are the Executive Director and arrive at work...

- ✓ As you sit down at your desk, your AI assistant provides a summary of today's schedule with notes to prep for each meeting
- ✓ You review an AI-generated summary of the week's relevant news articles, along with a new government regulation and its impact to your organization
- ✓ Next, you ask your device to create a draft slide deck for next week's board meeting and have it in your inbox by Monday

- ✓ You review an automated email summary report of last month's fundraising campaign. You type questions into Excel to get a summary of the key insights and ideas for improvement to review with your team
- ✓ You rehearse speaking notes for tonight's fundraising event drafted by ChatGPT

You have technology as your sidekick... and more time to focus on your mission and employees



POSSIBLE (RE)DEFINED

The End

THANK YOU
Questions?

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