

AI for Not-for-Profits

- *By Raghuram*



Today's Presenter - *Raghuram*



C-Suite Marketing & Operations Leader at a Leading Digital Marketing Agency, Toronto

Raghuram brings 30+ years of experience, including 20+ years in management, operations, and business delivery. He specializes in revenue operations, marketing operations, AI enablement, and end-to-end process optimization.

He spent nearly a decade in India scaling operations across IT services, BPO, and consulting.

In Toronto, he has led digital marketing strategy and operations at various marketing agencies, helping 350+ North American businesses drive growth. He currently heads operations and delivery at a leading marketing agency in Toronto, leading distributed teams and AI transformation initiatives.

He also serves as Vice President on the Board of Sampradaya Dance Creations and speaks on practical AI adoption.

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Agenda



- 1. The Reality**
- 2. The Hype**
- 3. The AI Opportunity**
- 4. AI Capabilities**
- 5. AI Terminology**
- 6. AI - for Donor Segmentation**
- 7. AI - for Grant Writing**
- 8. Failure Patterns**
- 9. Ethical AI**
- 10. AI Adoption**

The *Reality*

In Canada, over two-thirds of nonprofits are already using AI in fundraising and communications; but most are doing it without a clear strategy.

67% of Canadian nonprofits use AI for communications and fundraising; 50% for data-related tasks

- [Imagine Canada](#) (Jan 2026)

AI use for content creation among Canadian charities rose from 68% (2023) to 75% (2024)

- [Carlton University](#) (Jul 2025)

~75% of nonprofits are already experimenting with AI, but only 9% feel ready to adopt it responsibly

- [Hilborn Charity eNews](#) (Sep 2025)

The *Hype*

“AI will replace staff and volunteers”

→ **In reality,**

AI is mostly used for basic support tasks like writing, editing, and summarizing; not replacing roles.

- 89.4% of Canadian organizations using AI report no change in employment levels
- ~70% expect no employment impact in next 12 months

- Statistics Canada (Jun 2025)

“We need large datasets and clean systems to start”

→ **In reality,**

AI adoption begins with simple, unstructured tasks like writing, editing, and summarizing.

- 67% of Canadian nonprofits use AI for communications and fundraising
- 50% use it for basic data and information tasks (not advanced analytics)

- Imagine Canada (Jan 2025)

“We need to be fully ready before we start”

→ **In reality,**

Most nonprofits are already experimenting with AI without full readiness or formal strategy .

- Nearly 75% of nonprofits are experimenting with AI in small ways
- Only 9% feel ready to adopt AI responsibly

- AI Equity Project (Sep 2025)

The *AI Opportunity*

Cut time on repetitive work by 30 - 60% using AI the right way

- 1. Content drafting (emails, donor outreach, social posts)**
 - Save over 50% of manual effort on writing tasks

20% - 60% productivity gains observed
- 2. Summarization (reports, meeting notes, grant documents)**
 - Compresses hours of reading, and assimilation into minutes

50% - 90% time savings on summarization tasks
- 3. Research & information gathering**
 - Ideal for Grant discovery, Community insights, and Program benchmarking

AI reduces research workload by ~50% on average
- 4. Data cleanup & basic reporting**
 - Automate messy data (emails, spreadsheets) into structured reports

Up to 95% of repetitive data entry tasks are automatable
- 5. Translation & multilingual communication**
 - Great for multilingual communication for South Asian community outreach

20–60% productivity gains in language-based tasks

AI Capabilities

LEVEL 1

LEVEL 2

LEVEL 3

LEVEL 4

AI-Assisted

What actually happens:

- ⇒ You write a donor email
- ⇒ You paste it into ChatGPT
- ⇒ It improves wording
- ⇒ You copy and send it

Human role:

- ✓ You decide everything
- ✓ AI only helps with speed



AI Capabilities

LEVEL 1

LEVEL 2

LEVEL 3

LEVEL 4

AI-Augmented

What actually happens:

- ⇒ You ask ChatGPT to “Write a grant proposal”
- ⇒ It gives a full draft
- ⇒ You edit, refine, approve
- ⇒ You submit it manually

Human role:

- ✓ You guide, review, and finalize
- ✓ AI creates first version



ChatGPT



Gemini



Claude

AI Capabilities

LEVEL 1

LEVEL 2

LEVEL 3

LEVEL 4

AI-Integrated

What actually happens:

Example: Donor follow-up after event

- ⇒ Event attendee list goes into your system
- ⇒ AI writes personalized thank-you emails
- ⇒ Emails are sent automatically
- ⇒ Replies are captured and organized

Human role:

- ✓ You set rules once
- ✓ You review exception cases or important responses

zapier

integrately

make

AI Capabilities

LEVEL 1

LEVEL 2

LEVEL 3

LEVEL 4

AI-Autonomous

What actually happens:

Example: Fundraising outreach campaign

- ⇒ AI identifies potential donors
- ⇒ Writes and sends outreach emails
- ⇒ Tracks responses
- ⇒ Sends follow-ups automatically
- ⇒ Adjusts messaging based on replies

Human role:

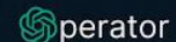
- ✓ You approve the initial setup
- ✓ You review performance weekly
- ✓ You step in for sensitive decisions



n8n



OpenAI



AI Terminology - basic



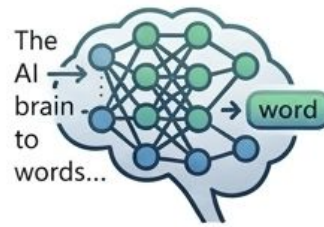
Machine Learning

Computers learn patterns from data instead of being programmed step-by-step.



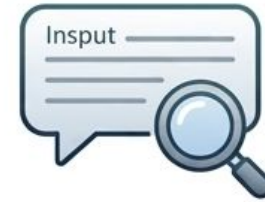
Generative AI

AI that creates content (text, images, emails, reports).



Large Language Model (LLM)

The AI brain that predicts the next word in a sentence.



Prompt

The instruction you give AI (your question or request).



Prompt Engineering

Writing better instructions to get better results.

AI Terminology - intermediate

HALLUCINATION



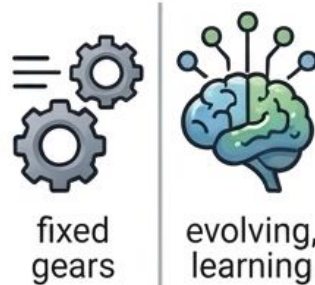
AI gives a confident but incorrect answer

AI AGENT



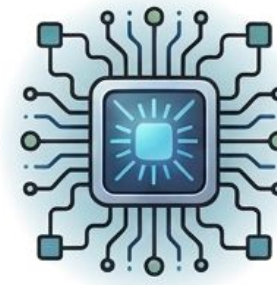
AI that can take actions (update systems)

AUTOMATION vs AI



fixed rules and gears | vs | AI: evolving network, learns and adapts

MODEL



The trained system that produces answers

TRAINING DATA



The data AI learned from

AI Terminology - advanced



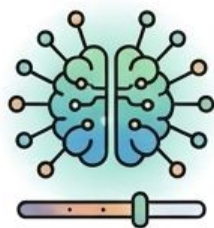
NATURAL LANGUAGE PROCESSING

AI understands human language



MULTIMODAL AI

AI works with text, images, and audio



PARAMETERS

The size and capability of the AI brain



AGI (ARTIFICIAL GENERAL INTELLIGENCE)

AI that can think like humans (not real yet)



VIBE CODING

Writing code by describing what you want instead of coding manually



CONTEXT WINDOW

How much information AI can remember in one interaction

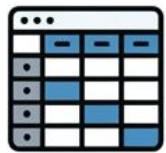
AI - for Donor Segmentation

	Manual Process <i>(Current State)</i>	Level 1 <i>(ChatGPT / Gemini)</i>	Level 2 <i>(Email Automation Tool)</i>	Level 3 <i>(Email Automation Tool + AI Features)</i>	Level 4 <i>(AI Agents Automate Workflow)</i>
Identify Donors	Use past lists, spreadsheets, guesswork	Use ChatGPT to suggest donor types	Import list, filter using rules (location, donation)	Tool analyzes behavior to find likely donors	Tool continuously identifies high-potential donors automatically
Segment Donors	Manually group (new, active, lapsed)	Ask ChatGPT to suggest segments	Create segments manually in tool	Tool auto-creates segments from behavior patterns	Segments update dynamically based on real-time activity
Create Messaging	Write one message for everyone	ChatGPT improves or rewrites email	Tool sends same message per segment	Tool personalizes content per segment	Tool personalizes message per individual donor
Send Campaigns	Send bulk emails at fixed time	Use AI to improve subject lines	Schedule batch campaigns in tool	Tool sends at best time per donor (predictive sending)	Tool runs campaigns automatically based on goals
Follow-Up	Manual reminders (often missed)	ChatGPT drafts follow-up messages	You schedule follow-ups manually	Tool triggers follow-ups based on actions	Tool adapts follow-ups based on donor behavior
Analyze & Improve	Check reports manually, basic insights	ChatGPT summarizes results	You interpret reports manually	Tool gives AI insights and recommendations	Tool continuously optimizes campaigns automatically

AI - for Grant Writing

	Manual (What they do today)	Level 1 (ChatGPT / Gemini)	Level 2 (Grant Tools: Instrumentl / Grantable / Excel)	Level 3 (Grant Tools + AI Features)	Level 4 (AI Agents / Autonomous Systems)
Find Grants	Search Google, websites, newsletters	Ask ChatGPT for grant ideas	Use grant databases with filters	Tool recommends best-fit grants using AI	Tool continuously finds and ranks new grants automatically
Understand Requirements	Read long RFPs manually	Paste RFP into ChatGPT for summary	Extract key points manually in tool	Tool extracts requirements and flags gaps	Tool matches requirements to organization automatically
Draft Proposal	Write from scratch each time OR use a template	ChatGPT drafts first version	Copy-paste and edit in tool	Tool generates tailored draft using grant + org data	Tool creates full proposals aligned to funder expectations
Customize & Review	Rewrite, check and get approvals manually	Ask ChatGPT to refine and review	Reuse past proposals manually	Tool adapts content and flags compliance gaps	Tool auto-validates and personalizes per grant
Submit & Track	Track deadlines in Excel / your calendar	Ask AI to create structured reminders	Use tool to track submissions	Tool tracks deadlines and suggests priorities	Tool manages pipeline and prioritizes high-success grants
Learn & Improve	Learn manually from outcomes	Ask ChatGPT for contextual feedback ideas	Store past proposals manually	Tool analyzes success/failure patterns	Tool continuously improves proposals based on results

Failure *Patterns* - Poor Data Quality



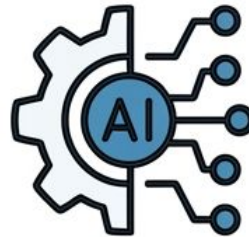
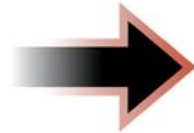
Incomplete data



Duplicates



Outdated information



AI processes input as-is



Wrong segmentation



Poor targeting



Low-quality output

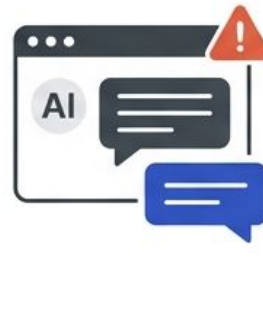
Failure *Patterns* - *Blind Trust* in AI Output

User Behavior



Accepts AI output | No verification | Trusts instantly

AI Response



AI generates answer | May sound looks clean and confident.

Failure Outcome

- ! Wrong donor messaging
- ! Incorrect grant details
- ! Misleading information

Incorrect decisions | Wrong communication | Loss of trust

Failure *Patterns* - *Loss of Human Voice & Trust*

Human Content – Original State



- Personal tone
- Authentic message
- Human connection



AI Generation



AI generation

- AI-generated content
- Polished but generic



Outcome Problem



Outcome Problem

- Generic messaging
- Weaker engagement
- Loss of trust

Failure *Patterns* - Privacy & Data Misuse

Sensitive Data Input



Donor data



Personal information



Sensitive records



AI Tool Interaction

Data entered into AI



Processed externally



Risk / Negative Outcome



Data exposure

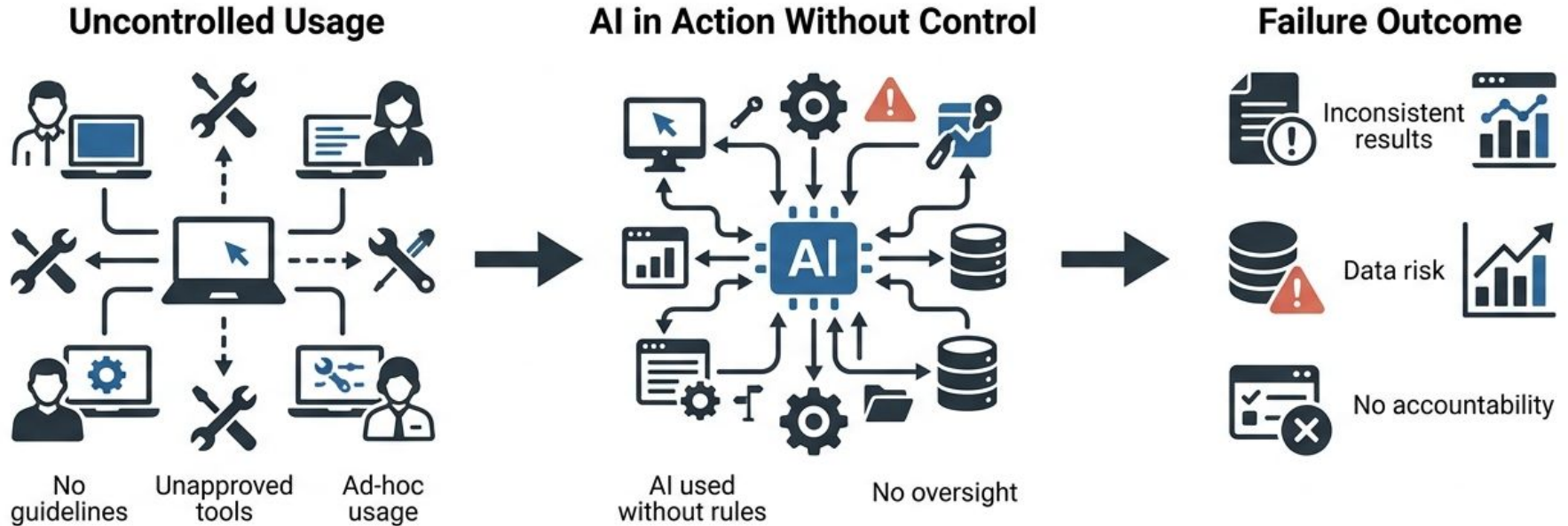


Privacy breach



Loss of trust

Failure *Patterns* - Inadequate Governance



Ethical AI

Guidelines:

What Nonprofits Should Do:

Fairness



Prevent harm, bias, and discrimination in AI use

[\(Ontario Human Rights Commission\)](#)

- Do not target only “high-income” donors
- Check grant scoring outputs for bias before submission
- Ensure outreach includes diverse community groups

Transparency



Clearly communicate when and how AI is used

[\(Code for Canada\)](#)

- Add note in emails: “AI-assisted content” where appropriate
- Inform donors if AI is used in communication or support
- Document internally where AI is used (grants, outreach, reports)

Accountability



Assign clear responsibility and oversight for AI decisions

[\(Ontario / Canadian governance frameworks\)](#)

- Assign one owner for AI outputs (marketing lead, grant lead)
- Do not send donor emails without human review
- Ensure final grant submissions are human-approved

Privacy & Data Protection



Protect personal data and comply with Canadian privacy laws

[\(PIPEDA, Government of Canada\)](#)

- Never paste donor lists into public AI tools
- Use tools that store data in compliant environments
- Limit access to donor data inside your team

Safety & Reliability

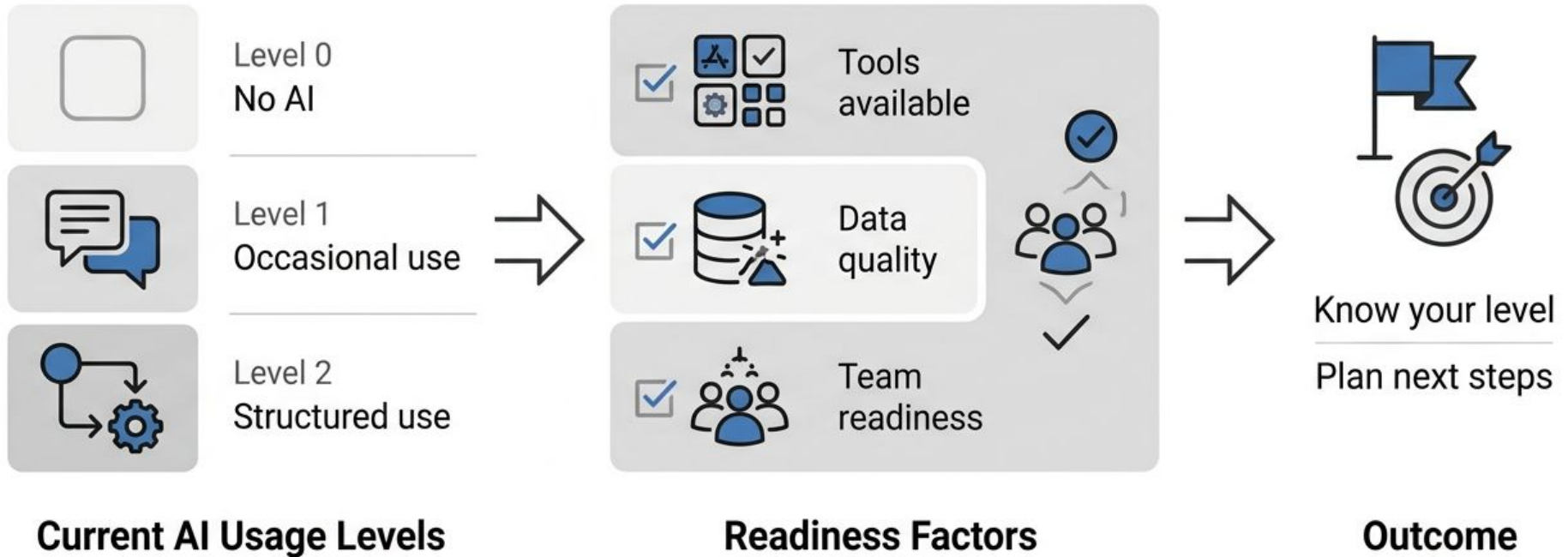


Assess risks and verify outputs before use

[\(Government of Canada\)](#)

- Fact-check all AI-written grant content
- Review donor messaging before sending
- Do not rely on AI for final decisions without validation

AI Adoption - *Current State*



AI Adoption - *Self-Assessment*

#	Assessment Question	1	2	3	4	5
1	We use AI tools (ChatGPT, Gemini) in everyday work	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
2	We use AI for real outcomes (donor emails, grants, reports, etc.)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
3	We review AI output before using it	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
4	We use AI inside tools we already use (email, CRM, docs)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
5	Some tasks are automated (emails, reminders, follow-ups)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
6	Our data (donors, programs) is clean and usable	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
7	Our team is comfortable using AI tools	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
8	We know where AI should and should NOT be used	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
9	We are careful about what data we share with AI tools	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
10	We are seeing real results (time saved or better outcomes)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

AI Adoption - *Score Interpretation*



Beginner (10–25)

Just starting

- Use ChatGPT / Gemini for simple tasks
- Learn how tools work
- Review all outputs manually



Intermediate (26–40)

Regular usage

- Standardize 2–3 workflows
- Add basic automation
- Use AI inside existing tools



Advanced (41–50)

AI integrated

- Integrate AI into systems
- Track performance
- Optimize and scale usage

AI Adoption - *BEGINNER* Plan

30 Days

Start



Use ChatGPT / Gemini daily

Identify 3–5 tasks for AI

Assign AI owner + stakeholders

Save 3–5 prompts

Run 1 training session

60 Days

Repeat



Use AI for 2–3 tasks consistently

Standardize tasks with workflows

Define roles (use vs review)

Build shared prompt library

Ensure weekly team usage

90 Days

Stabilize



Make AI default for tasks

Add 1 new AI use case

Expand ownership across teams

Refine prompts continuously

Ensure daily team usage

AI Adoption - *INTERMEDIATE* Plan



30 Days Structure

- Audit AI usage (ChatGPT, tools)
- Identify 3–5 repeatable tasks
- Define AI usage rules
- Standardize prompts/templates
- Assign AI owner + reviewers



60 Days Integrate

- Use AI inside existing tools
- Build simple workflows (draft → review → send)
- Set up basic automation
- Ensure consistent team usage
- Track performance (time, quality)



90 Days Optimize

- Make AI workflows default
- Expand to 1–2 new processes
- Increase automation coverage
- Refine prompts continuously
- Optimize based on results

Questions?



Point your camera at the QR,
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