Using AI So It Works for You

A practical guide for nonprofit leaders

FACSI Summit
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Let's be honest for a second.

🤦 **Who has tried an AI tool?**

🤔 **Who has tried it and then stopped?**

😬 **Who hasn't started yet — and honestly isn't sure where to?**

💡 **Who uses AI every day but hasn't told anyone?**

You're all in the right place.

A framework so new tools don't confuse you

The Four Families of AI Tools — Mike Foster, Foster Institute

1

Analysts

You chat · It informs



2

Assistants

You delegate · It acts



3

Worker-makers

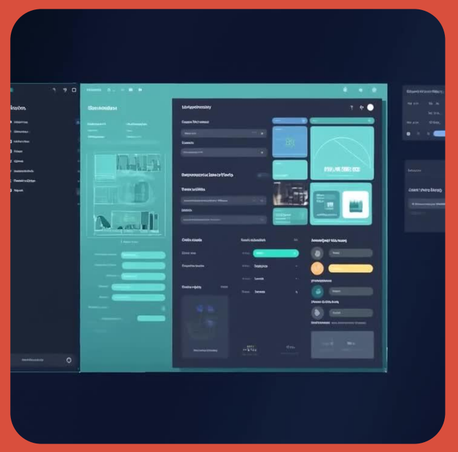
You build the workers



4

Program-makers

You build the programs



Most nonprofit professionals today live in Family 1. That's exactly where we'll start.

Family 1 · Analysts

You chat with it. It researches, summarizes, drafts, and advises. You decide what happens next.



General Chat Analysts

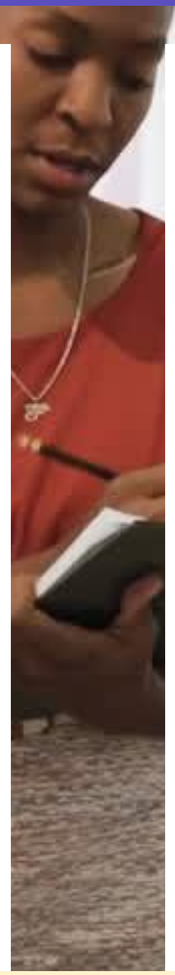
Claude	• Nicole uses — deep thinking, long docs
ChatGPT	• Nicole uses — writing, research
NotebookLM	• Nicole uses — research synthesis
Microsoft Copilot	• Built into M365 — you may already have it
Gemini	• Google's AI — Patrick uses for research
Perplexity	• AI-powered web research

Customized Analysts

Claude Projects & Skills	• Nicole uses — trained for specific tasks
Custom GPTs	• ChatGPT configured for your workflow
Gemini Gems	• Patrick uses — custom AI for RFPs
M365 Copilot Agents	• Custom AI inside your Microsoft apps
Perplexity Spaces	• Research organized by project

Family 2 · Assistants

You delegate a task. The AI completes it — moving files, sending emails, updating records.



Cloud Task Agents

ChatGPT Agent	• Browses web, runs tasks on your behalf
Gemini Spark	• Google's task agent — in preview
Perplexity Computer	• Researches and acts on findings
M365 Copilot Cowork	• Works across your Microsoft apps

On Your Machine

Claude Desktop	• Works alongside your files and apps
Microsoft Scout	• Experimental — watches your screen
Perplexity Personal Computer	• Runs locally on your machine

⚠️ Risk increases with this family. These tools take real action — approach carefully and use safeguards.

Family 3 • Worker-makers

You build workers that start automatically — when an email arrives, at a set time, when a form is submitted.

Workflow Automation

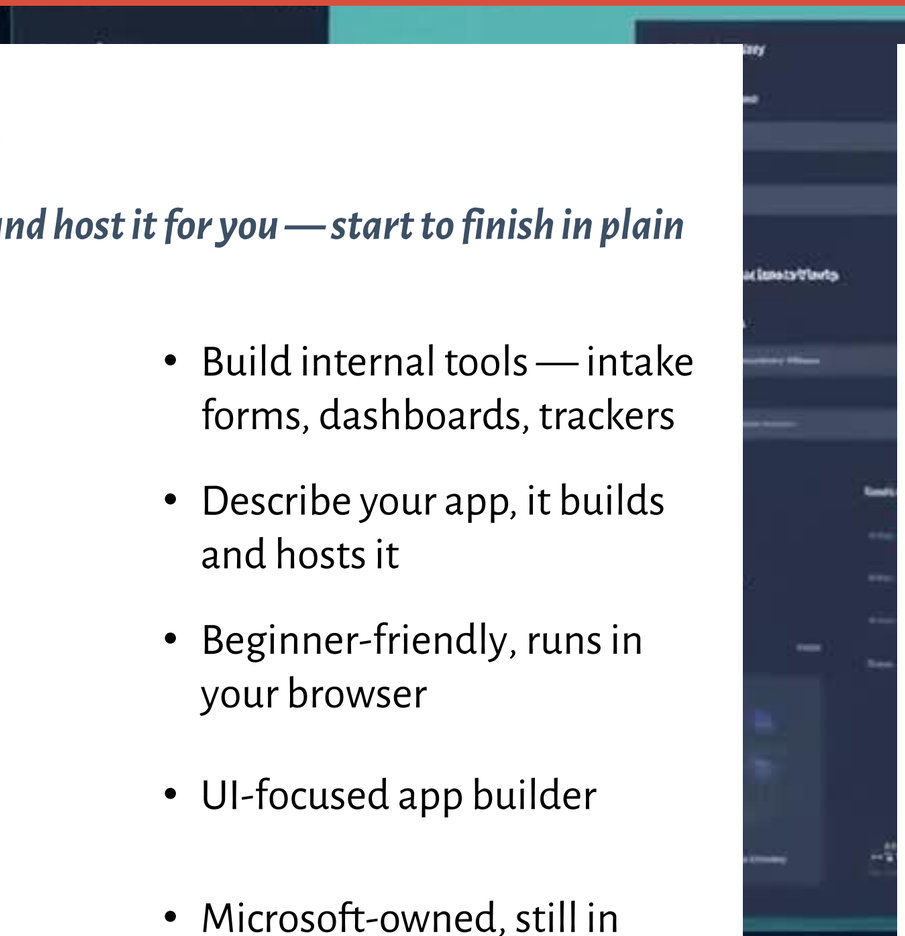
Zapier	• Connects your apps — been around for years, now has AI steps
Make.com	• Visual workflow builder with AI
MS Power Automate	• Microsoft's workflow tool — may already be in your M365
n8n	• Open-source option for tech-comfortable teams
Gumloop	• Newer, AI-first workflow builder

Agent Builders

Marblism	• Nicole uses — builds AI employees for donor outreach & social media
Zapier Agents	• Give an AI a goal, let it figure out the steps
Botpress	• Build AI chatbots for your website or intake
MS Copilot Studio	• Microsoft's agent builder — part of M365
StackAI	• No-code agent builder for nonprofits

Family 4 · Program-makers

Describe a tool you wish existed — in plain English. AI writes the program. No coding required.



App Builders

Write a program and host it for you — start to finish in plain English

Base44	• Build internal tools — intake forms, dashboards, trackers
Lovable	• Describe your app, it builds and hosts it
Replit	• Beginner-friendly, runs in your browser
v0 (Vercel)	• UI-focused app builder
GitHub Spark	• Microsoft-owned, still in preview

Agentic Coding Tools

More power and flexibility — AI writes code you can run anywhere

Claude Code	• Nicole uses — builds tools and automates workflows
GitHub Copilot	• AI assistant for developers — inside VS Code
Cursor	• AI-powered code editor
Codex	• OpenAI's coding agent

You may already have AI — and not know it.

Microsoft 365 / Copilot

If your org uses M365, Copilot may already be available inside Word, Outlook, and Excel. Ask your IT contact.

Canva

Magic Write, Magic Design, and AI image generation are built into your existing Canva account.

ActiveCampaign

AI-powered email subject lines, send-time optimization, and predictive content are built in.

Hootsuite

OwlyWriter AI generates social captions and post ideas directly inside the platform.

Mailchimp / Constant Contact

AI subject line suggestions and content generation — available on most paid plans.

Salesforce / HubSpot

If your CRM is Salesforce or HubSpot, Einstein AI and Breeze AI are already there.

Before you buy anything new — check what you're already paying for.

The privacy question — and why it matters

Free tools may use your data to train their models

When you paste a client story, a grant narrative, or confidential org information into a free AI tool, that content may be used to improve the model. Paid subscriptions typically opt you out of this.

Nicole uses paid subscriptions for everything — here's why

Privacy, better performance, and no usage limits. The investment is worth it for professional use. Most plans run $20–$30/month per user.

One rule of thumb for your team

Never put anything into an AI tool that you wouldn't put on a public bulletin board — unless you're on a paid plan with a clear data privacy policy.

Risk increases as you move through the families

Family 1 is lowest risk. Family 2 (task agents that take action) and Family 3 (automated workers) require more safeguards. Start in Family 1 and move carefully.

What I use — and what it does for me

F1

Claude

Grant narrative drafts, board memos, policy analysis, complex research, building the Commit to Six™ framework

F1

ChatGPT

Writing, brainstorming, quick research, preparing for meetings and presentations

F1

NotebookLM

Upload RFPs, reports, or research and have a conversation with the documents

F1

Murf AI

Professional voiceovers for training materials and program content

F1

Midjourney

Custom images for presentations, social media, and marketing materials

F3

Marblism

AI employees running donor outreach and social media workflows automatically

F1

Canva AI

Design + AI-generated content inside the same tool I already use for graphics

F1

M365 Copilot

Drafts inside Outlook, summaries in Word, formula help in Excel

Three ways AI saves me real time — right now

01

Reading a 40-page RFP in 3 minutes

Drop a government RFP into NotebookLM or Claude. Ask: "Should we respond to this? What are the risks? What would disqualify us?" Get a Go/No-Go analysis immediately — before spending hours reading it yourself.

02

Drafting board materials and grant reports

Feed Claude your program data and ask it to draft the narrative. I review, refine, and personalize — but the blank page problem is gone. What used to take a day takes two hours.

03

Running donor outreach while I sleep

Marblism runs AI employees that handle routine donor touchpoints automatically. The right message, at the right time, without me having to remember to send it.

Where to start — this week

1 **Pick ONE tool from Family 1**

- Claude or ChatGPT. Sign up for the paid version ($20/month). That's your starting point.

2 **Give it ONE real task this week**

- A grant summary. A board update. A donor letter. Something you'd normally spend 2+ hours on. See what happens.

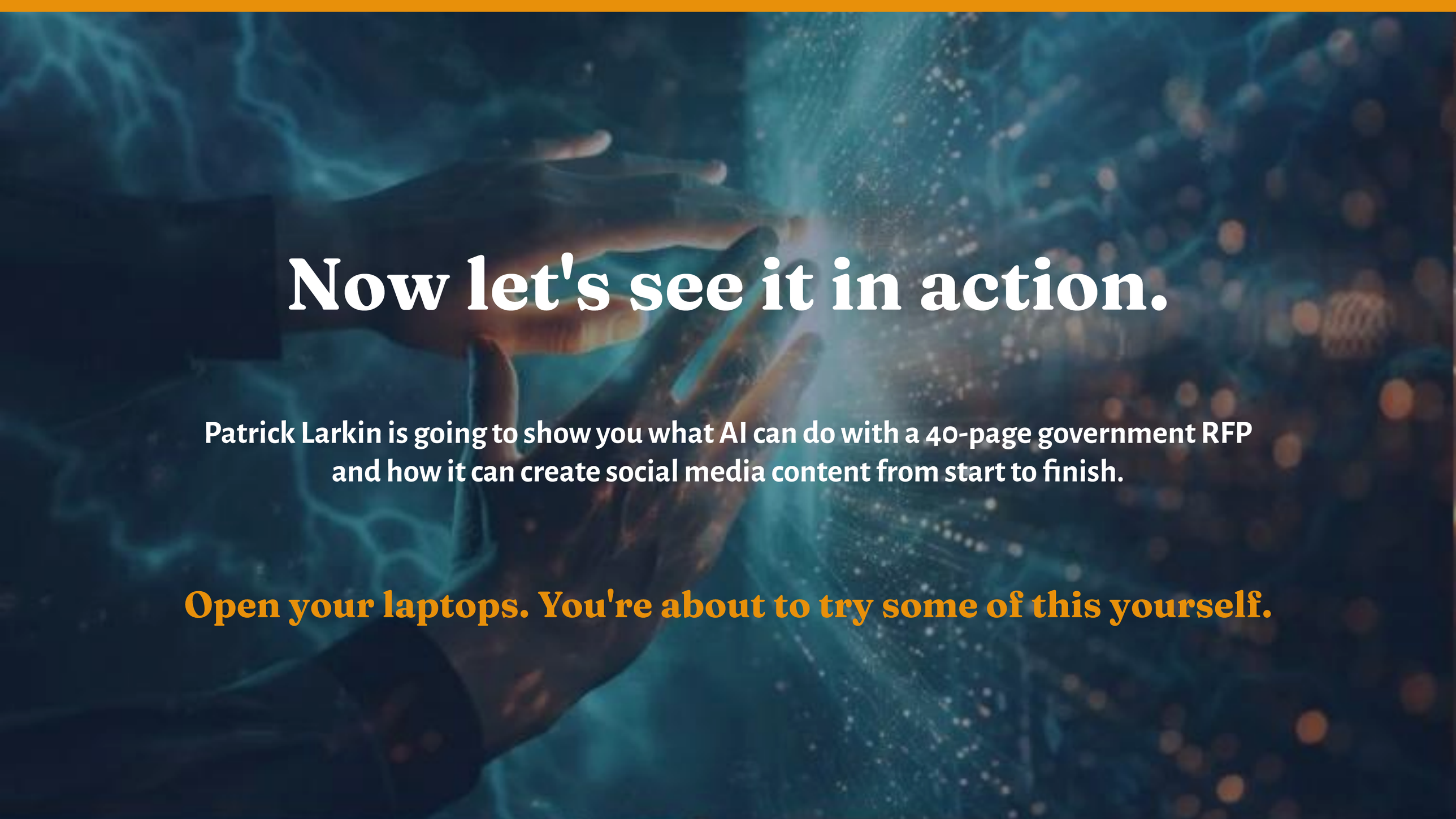
3 **Check what you already have**

- Log into Canva, M365, ActiveCampaign, or Hootsuite. Look for an AI tab or Magic button. You may already be set.

4 **Don't try to use everything at once**

- One tool, one use case, one win. Then build from there. The goal isn't to use AI everywhere — it's to use it where it actually saves you time.

You don't have to be technical. You just have to be willing to try.



Now let's see it in action.

Patrick Larkin is going to show you what AI can do with a 40-page government RFP and how it can create social media content from start to finish.

Open your laptops. You're about to try some of this yourself.

DEMO 1 · PATRICK

Meet the Gem: an AI with a job description

01

Instructions

Written once, used every time: “Act as our RFP intake analyst. Check fit, deadlines, required forms, fatal flaws and risks.”

02

Knowledge

Files it should always know: our services, the clients we serve best, our past projects.

03

Output

The same 8-section report every time, so nothing important gets skipped.

Every major AI has one

Gemini	Gems
ChatGPT	Custom GPTs
Claude	Projects
Microsoft Copilot	Agents

Nicole’s Family 1: Customized Analysts

TRY IT

Your turn: run the Gem with me

1. Open the attendee folder: scan the QR code or go to tinyurl.com/FACSI-AI.
2. Open “Start Here” and click the link to my RFP Intake Gem.
3. Upload the New Rochelle RFP from the folder.
4. Type “Analyze this RFP.” Then compare with my sample output.

No Gemini? Paste this into ChatGPT, Claude or Copilot with the RFP attached:

“You are an RFP intake analyst for a nonprofit. Read the attached RFP and give me: key dates, required forms, formatting rules, anything that would disqualify us, risk flags, and a Go / No-Go / Maybe recommendation with your reasons.”

Scan or go to

tinyurl.com/FACSI-AI

Gems open with any free Google account.

What came back in about 3 minutes

City of New Rochelle, NY · Housing Education Consulting Services · RFP-DV-2026-035

01

Snapshot

3-module housing education program, funded with federal HOME dollars.

02

Key dates

Due Sept 16 at 3:00 PM. The Q&A window had already closed.

03

Required forms

Schedules A through J, MBE/WBE statement, SAM.gov UEI, NY incorporation.

04

Format rules

30 double-sided pages max. Hard copy plus USB. Fee proposal sealed separately.

05

Go / No-Go

Maybe. Proceed with caution.

06

Risk flags

7 flagged, from staff certification to who owns the curriculum.

07

Questions to ask

None to draft: the question deadline had passed. It told us so.

08

Proposal outline

7 tabs mapped to the RFP's page limits, ready to assign.

The verdict, with its reasons

GO / NO-GO

MAYBE

Proceed with caution

Only 5 days left to write, assemble, notarize and hand-deliver the proposal.

Mission alignment
Tenant rights, homeownership and financial literacy are core CDC work.

HIGH

Capacity
Due in 5 days, and every facilitator must be HUD-certified.

SEVERE

Funding and rates
Up to 5 years, but raises are capped and travel isn't reimbursed.

MODERATE

Geographic fit
Strong for bilingual CDCs in Westchester County.

HIGH

Bid only if you already have: HUD-certified counselors, an active SAM.gov UEI, NY corporate authorization, and curriculum ready to go.

The fine print it caught for you

Rejected on arrival

Schedules A to J not signed, sealed and notarized, or an addendum not acknowledged, is a fatal defect.

Certified staff only

Every workshop facilitator needs an active HUD Housing Counselor Certification.

The City owns your work

Curriculum, slide decks, translations and surveys all become City property.

You cover the travel

Travel, lodging, meals and overhead are not reimbursed. Build them into your rates.

Raises are capped

Year-to-year increases can't exceed 2% or inflation, whichever is lower.

Cone of silence

Contacting City staff or officials about the bid means disqualification.

AI reads the fine print. You still make the call.

DEMO 2 · PATRICK

Social media music in two prompts

1 Gemini writes the lyrics

"Write short, upbeat song lyrics (one verse and one chorus, about 8 lines total) celebrating National Fluffernutter Day: peanut butter, marshmallow fluff, and nostalgic diner/soda-shop vibes. Keep it fun and simple, no complex rhyme scheme needed."

2 Suno makes the song

Paste in the lyrics, describe the style you want and click Create. It takes a few minutes, so I made ours ahead of time.

Style I used:
"*diner-pop, classic, nostalgic*"

3 You post it

It's original music, so no muted videos or copyright takedowns on Instagram, Facebook or TikTok.

Press play: “Fluffernutter Day”



Click the image to play · 38 seconds

VERSE

Slide into the diner’s corner booth,
We’ve got a retro classic for your sweet tooth.
Spread the creamy peanut butter on the bread,
Pile on the marshmallow fluff ahead!

CHORUS

Oh, it’s Fluffernutter Day, let’s give a cheer!
The sweetest, stickiest time of the year.
With a cherry cola or a vanilla shake,
It’s the best little sandwich you could ever make!

Make it work for your organization

Swap in your own moment

Homeownership Month

"Write an upbeat 8-line song celebrating first-time homebuyers for National Homeownership Month."

Volunteer thank-you

"Write a warm, folksy 8-line song thanking our Saturday volunteers."

Event countdown

"Write a fun 8-line song counting down to our annual gala."

Know the rules before you post

Suno free plan

Suno owns the song. You can use it for non-commercial purposes only.

Suno paid plan

You own the song and can use it commercially, even after you cancel.

Every tool

Read the music terms before posting for your organization.

HANDS-ON

Your turn: be the CFO for 12 minutes

Meet Cedar Hollow CDC, a made-up community development corporation with housing counseling, financial education and 40 affordable rental units. You get eight months of realistic, messy financials.

1. Go to tinyurl.com/FACSI-AI. Download “Cedar Hollow CDC FY2026 Financials.”
2. Open the AI tool of your choice. Free versions are fine: the data is fictional.
3. Upload the spreadsheet.
4. Copy the questions from “Start Here” and work through them.

Scan or go to

tinyurl.com/FACSI-AI

Works in ChatGPT, Claude, Gemini or Copilot.

Ask your AI these questions

1

The big picture

In plain English, how is Cedar Hollow doing this year compared to its budget?

2

Off-budget lines

Which lines are more than 10% off the year-to-date budget? Give the dollar gap and a likely reason for each.

3

The cash puzzle

Our deficit looks small, but our cash dropped a lot. Why? How many months of cash do we have versus our 3-month policy?

4

Grant deadlines

Today is October 8, 2026. Which grants need action in the next 90 days? Make a table with dates and next steps.

5

A second look

Does anything in this data look like a mistake or need a second look?

★

Stretch

Draft a half-page update for our board chair on the three biggest issues and what we recommend.

Pro tip: *ask it to show its work, then check one number yourself.*

DEBRIEF

What your AI should have found

0.9

months of cash on hand, against a 3-month reserve policy

$300K

the City still owes in grant reimbursements, up from $95K in January

$38K

net from the gala, against $105K in the budget

$6K

extra rent in March. It looks like it was paid twice.

$66K

of a foundation grant to spend by Dec 31, or give back

Trust, but verify

Ask it to show its work

Check one number yourself

If it's wrong, say so. It will fix it.

Take it home

Everything from today is in one folder:

- **RFP Intake Gem**
  Try it on your next RFP
- **New Rochelle RFP and sample output**
  See the full 8-section report
- **Cedar Hollow CDC financials**
  Practice spreadsheet with the questions
- **Every prompt from today**
  In the “Start Here” doc, ready to copy
- **“Fluffernutter Day”**
  The song and its lyrics

Scan or go to

tinyurl.com/FACSI-AI

Stays open after the Summit

Thank you!

Questions?

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