



No Impediments

# **AI Tools for Effective Leaders**

## **Donors, Stakeholders, and the Hive Mind**



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# Why Learn AI?

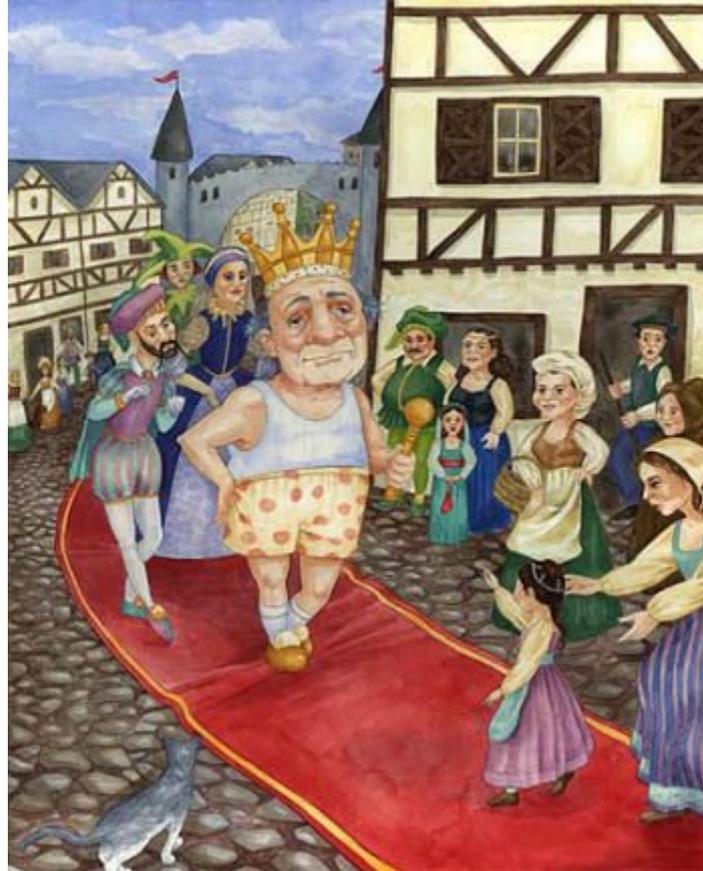


**44.2 per cent of the children in Grade 5 can read a Grade 2 level text in their native language.**



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# About Me





# In this Training

1. Topics in Scope:
  - a. Getting started with generative-text AI
  - b. Envisioning programs
  - c. Defining problems and goals
  - d. Stakeholder analysis
  - e. Messaging and capabilities
2. Topics out of Scope:
  - a. Generative audio, image, video
  - b. Prompt automation
  - c. AI training
  - d. Paid features

## Try this format

Throughout this training, suggested prompts will appear in monospace callouts like this one.

### Definition

**Artificial intelligence (AI)** is a technology that allows computers to perform tasks that typically require human intelligence. AI is a combination of computer science, cognitive science, and math.

### Definition

LLM stands for **large language model**, a type of artificial intelligence (AI) that can understand and generate human language. LLMs are trained on large amounts of data, such as text from the internet.



# Working Agreement

- Take it outside (phone calls, email, meetings)
- Assume positive intent
- Help each other out
- There are no dumb questions
- Wait for a break if you can; step out when you must.
- Please, yes PLEASE interrupt with questions.
- What else?



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# Getting Started with AI Tools





**THERE'S NO ROAD HERE!**



# In this Section

1. The landscape of AI tools (for the next five minutes)
2. Cautious use of AI
3. Learning the ground rules for your context
4. Basic Prompt Engineering
5. Playful experimentation

**TLDR\*:** AI tools all have commercial purposes, so be aware of those when choosing and using them. Some easy due diligence goes a long way toward fending off bias and hallucination. Learn and play by the rules in your context. Learn through silly experimentation.

\* “Too Long, Didn’t Read”



# From Fear to Opportunity



# Checklis

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- 

**Who is  
running out  
of things to  
do?**

# Big Names in AI - A Totally Non-Exhaustive List



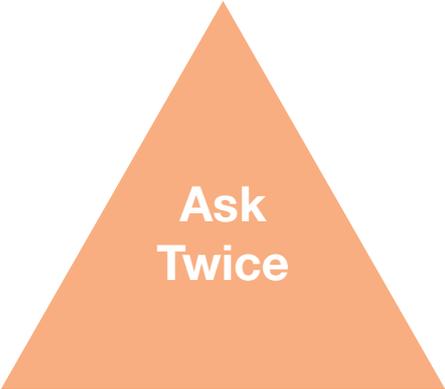
Gemini



# Cautious Use of AI



Checking  
Citations



Ask  
Twice

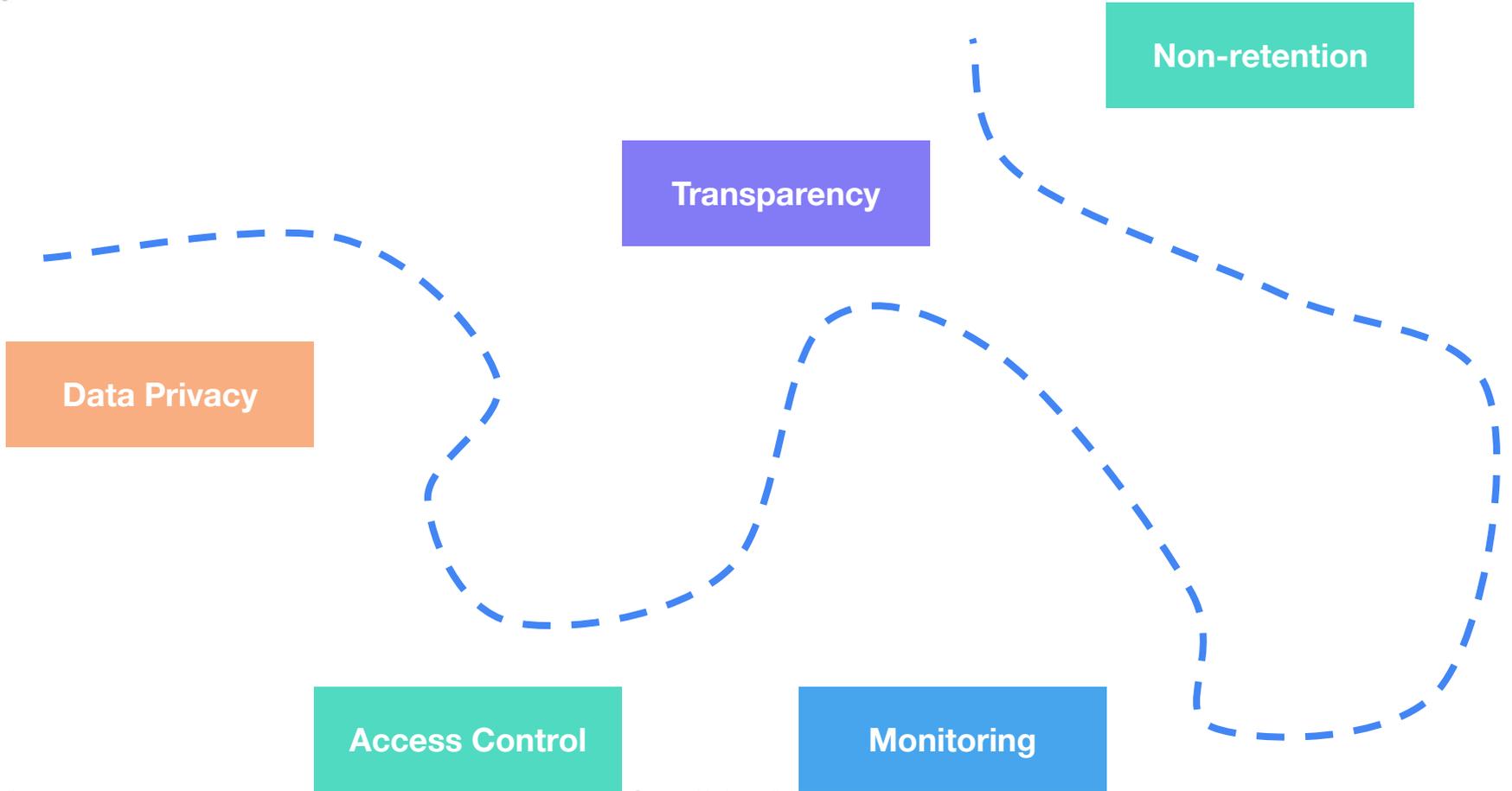


Get  
Options



Feedback  
Loops

# Research the ground rules for your context



# Basic prompt engineering



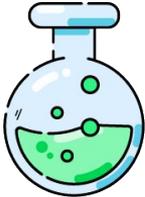
**Be Clear and Specific**



**Include Context**



**Use Structured Formats**



**Experiment and Iterate**



**Set Constraints**



**Ask for Multiple Options**



# Silly AI experiments are fun and sometimes useful



In a dimly lit, smoke-filled tavern, Julius Caesar and Kurt Cobain sit side by side, their laughter echoing through the room. A pair of half-empty beer mugs rest on the worn wooden table between them.

The stoic Roman emperor and the troubled grunge icon share a surprising bond, united by their shared experiences of fame, loss, and the weight of history.

For a fleeting moment, the chasm of time and circumstance seems to disappear, replaced by a shared understanding and a genuine connection.



# Group Activity - Write Down These Six Things

- 1. An underappreciated group of people or animals**
- 2. A mundane task**
- 3. The last cool program you read about**
- 4. A social good, like equity or recognition**
- 5. A value that you care about**
- 6. Guess the population of the biggest city you've ever been to**



# Group Activity - Mad-Lib NotThisAgain.org

An underappreciated group of people or animals

A mundane task

Last program you read about

A social good, like equity or recognition

A value that you care about

Guess the population of the biggest city you've ever been to



To serve **<underappreciated group of people or animals>**

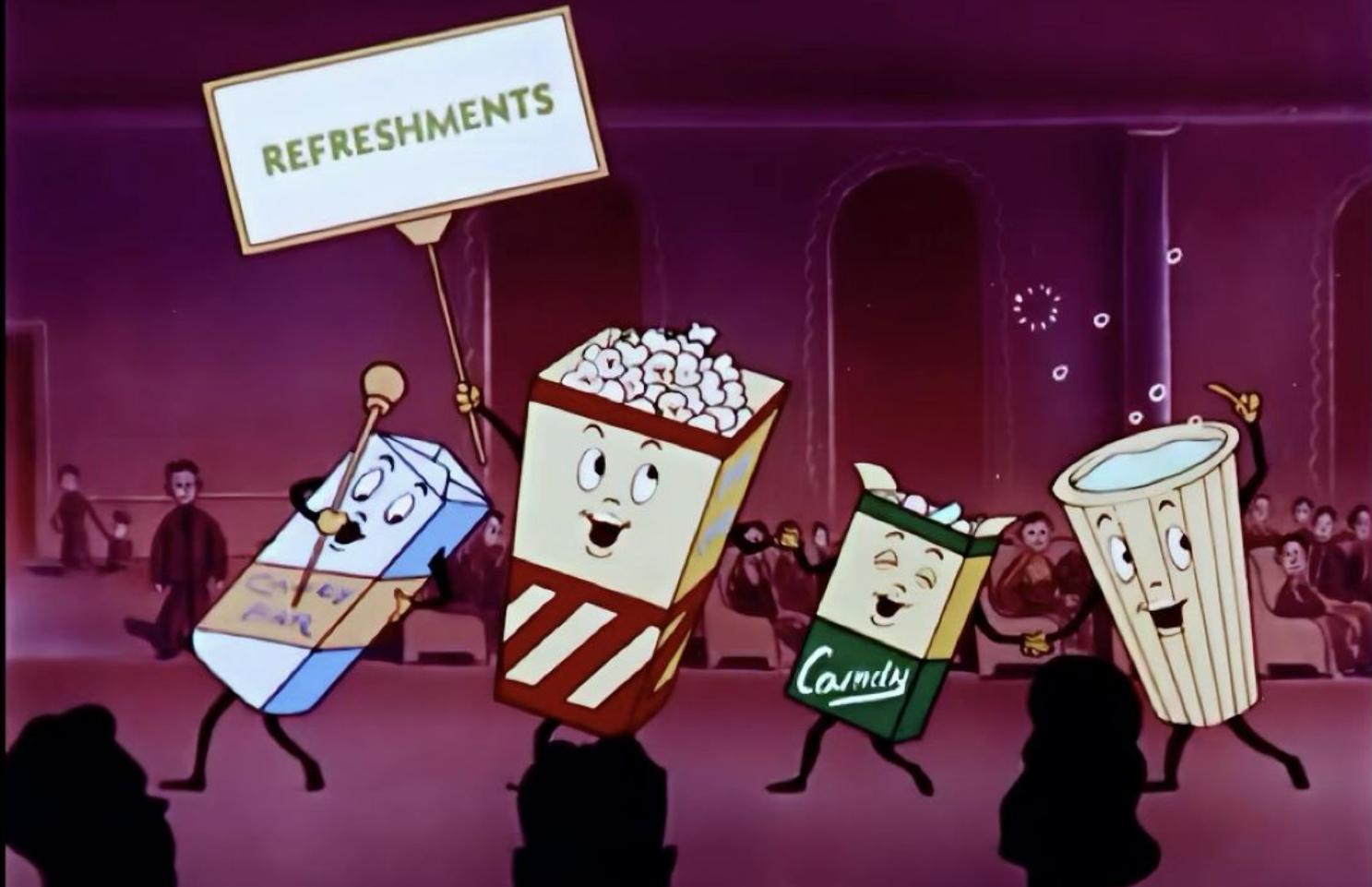
who **<a mundane task>**, our program is a

**<last program you read about>**

that provides **<a social good>** and is very **<A value that you care about>** unlike the incumbents in this space.

Our budget is **<guess the population of the biggest city you've ever been to>**

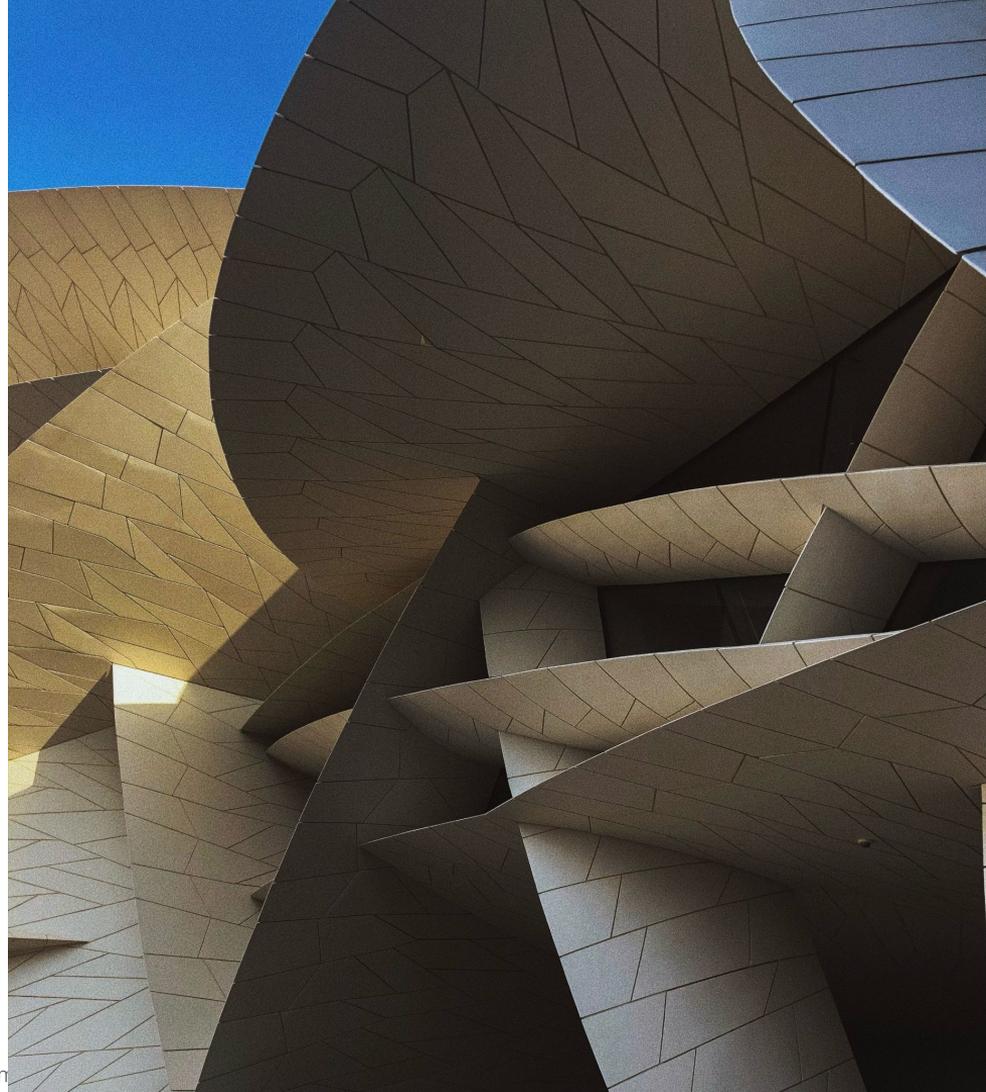
REFRESHMENTS





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# Envisioning Your Program



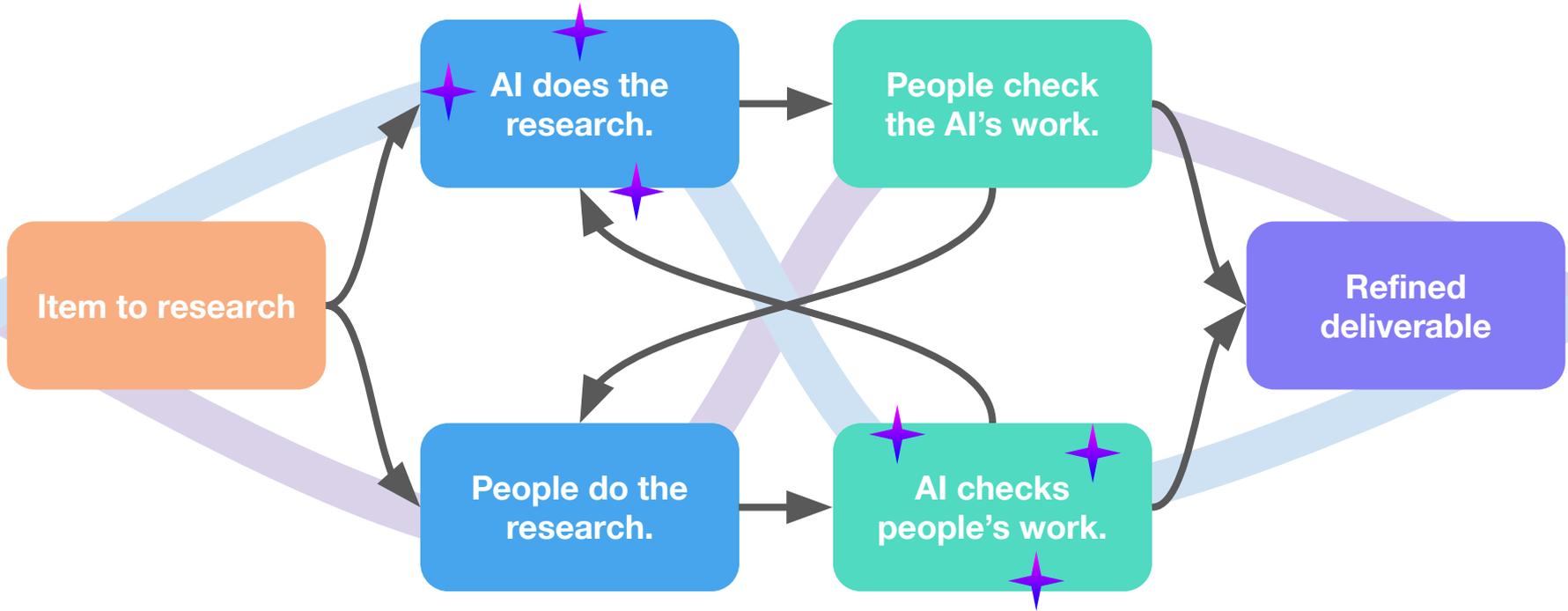


# In this Section

1. The human-AI feedback loop
2. Defining problem and goals
3. Taking baby steps at getting usable AI-generated text

**TLDR:** As you seek to get funding and design effective programs, AI can radically speed up the time it takes to define programs and goals. Use AI as your researcher, copywriter, and proofreader to both work faster and minimize errors.

# The Human-AI Feedback Loop



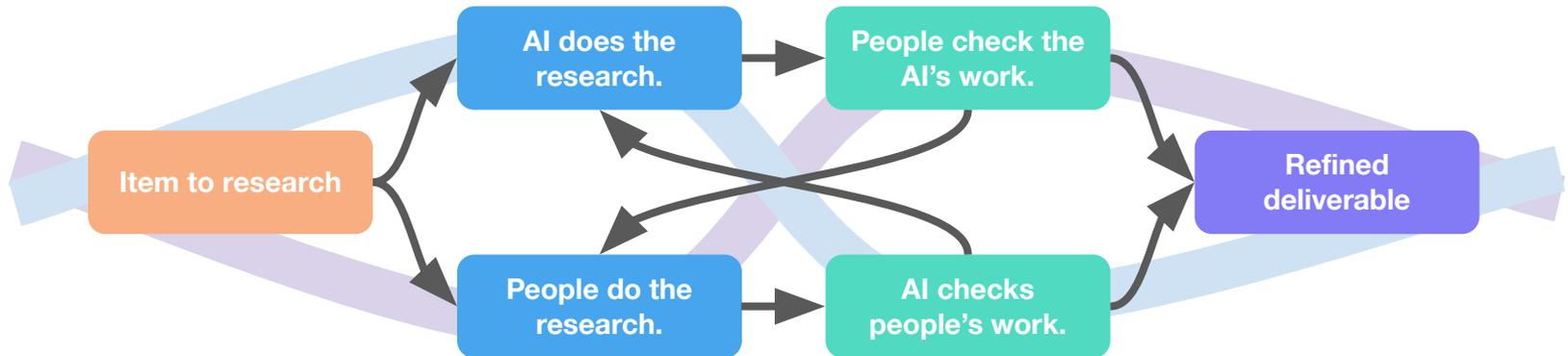
# Activity - The Human-AI Feedback Loop

Let's try this with something silly.

Jan-June Birthdays: Take your madlibs for NotThisAgain.org and refine it using AI. (Use AI to draft; you review)

Jul-Dec Birthdays: Draft your values and mission statement for NotThisAgain.org in your own words and then use AI to refine them according to your madlibs. (You draft; use AI to review)

At the 5 minute mark, switch to the opposite approach.



## Reflection

**What did you discover in your first experiment with the feedback loop?**

**Where will this help? Where won't this help?**



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# Defining Problems and Goals



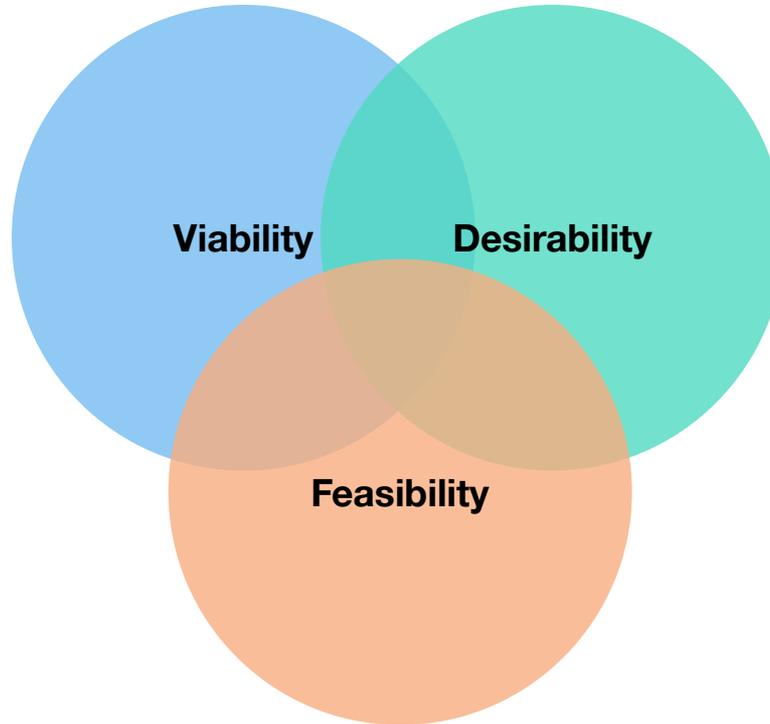
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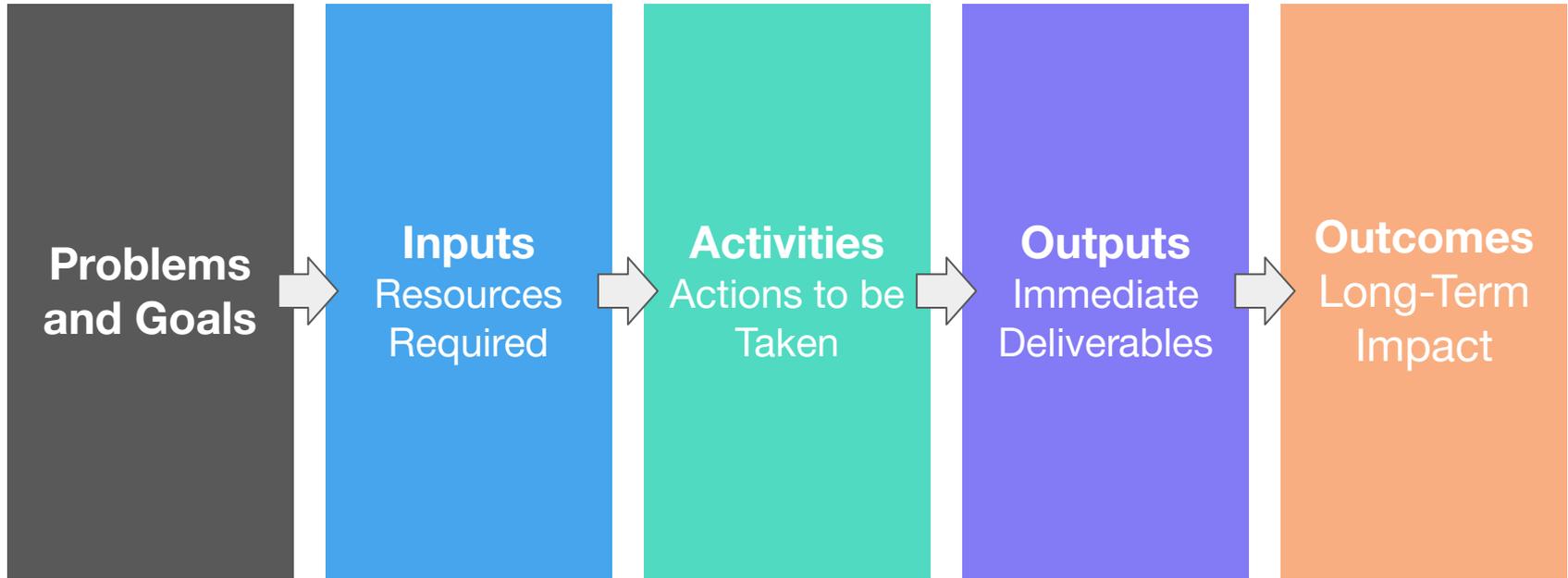
HAL

WAS A EVA

# The Innovation Trifecta

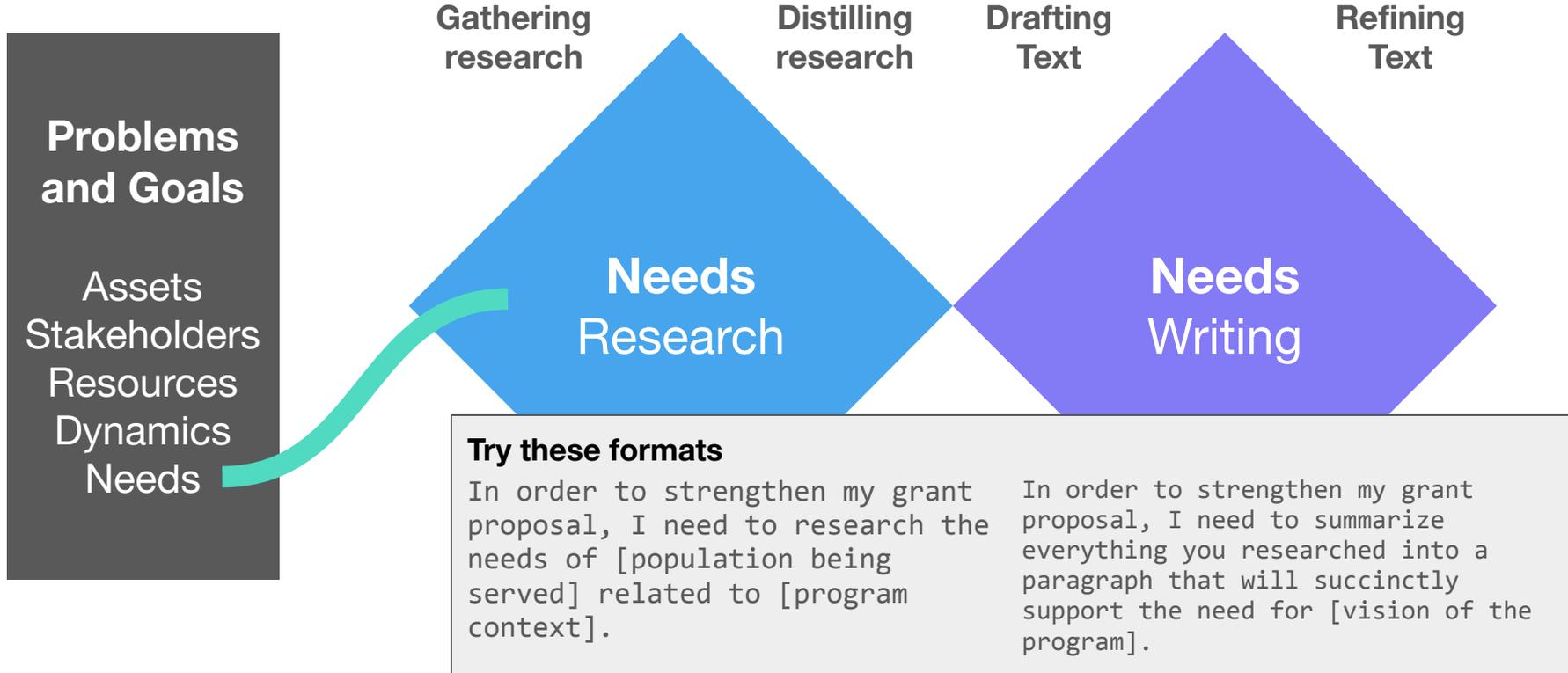


# Define the Problem and Goals





# Chris's Double Diamond



# Activity - Summarizing Problem and Goals

Choose a well-known organization you admire.

Use AI to create a summary of a hypothetical program's problems and goals using the methods and prompts from this section.

Hint: it may be helpful to compile source materials into a note or doc, then paste or attach it all into your first prompt.

**Time: 5 min**

Example inputs:

- Values Statements
- Mission Statement
- Community Assessments
- Impact Reports
- Strategic Plans
- Grant Reports

## Reflection

**How might this method of research help you better understand your problems and goals?  
Save any prompts you used that really worked well for you.**



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# Lunch!

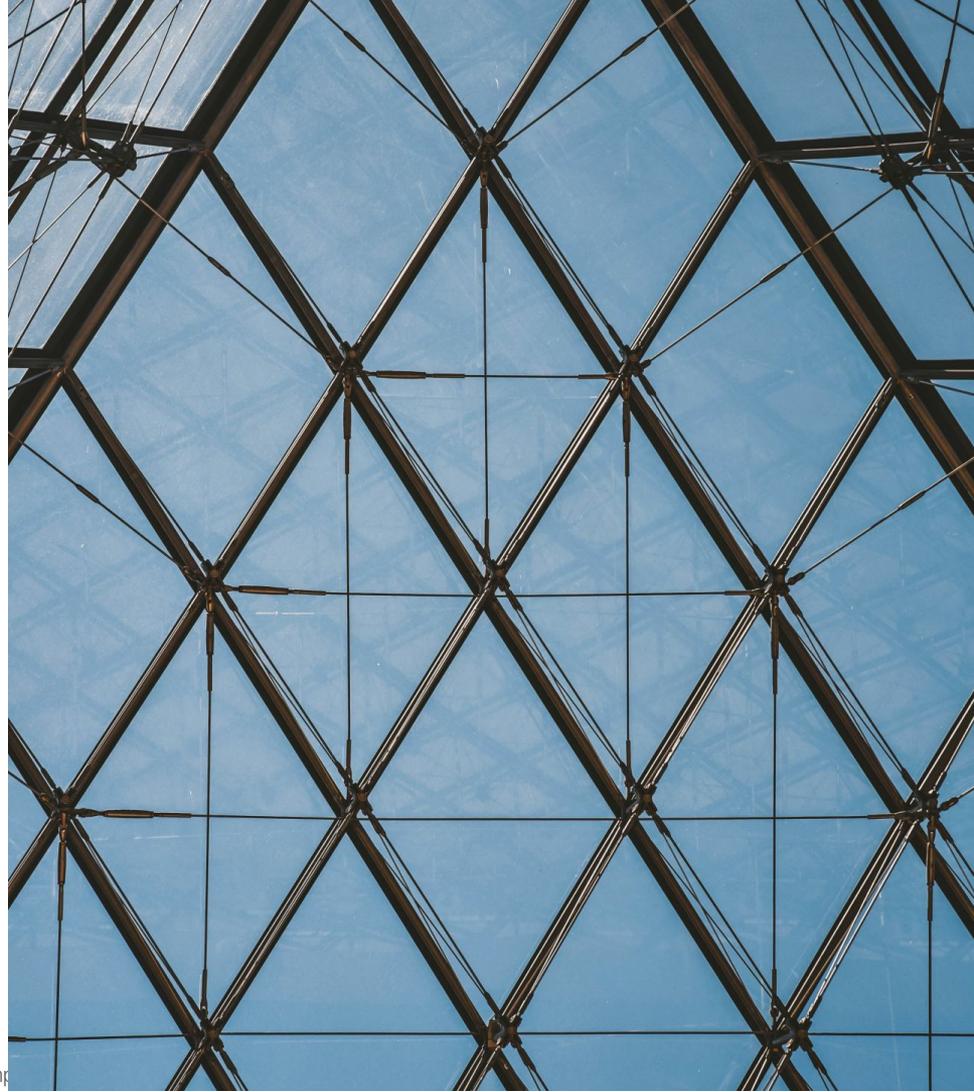


*“You were right—we should have just split one.”*



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# Rapid Stakeholder Analysis





# In this Section

1. DEI Analysis
2. Stakeholder Analysis
3. Activity

**TLDR:** Analyzing a program's stakeholders and the program's DEI impacts and context is a daunting task; breaking this down into incremental steps will help you recruit AI to rapidly research and summarize answers to all the pertinent questions.



# AI is Weirdly Great at DEI Analysis



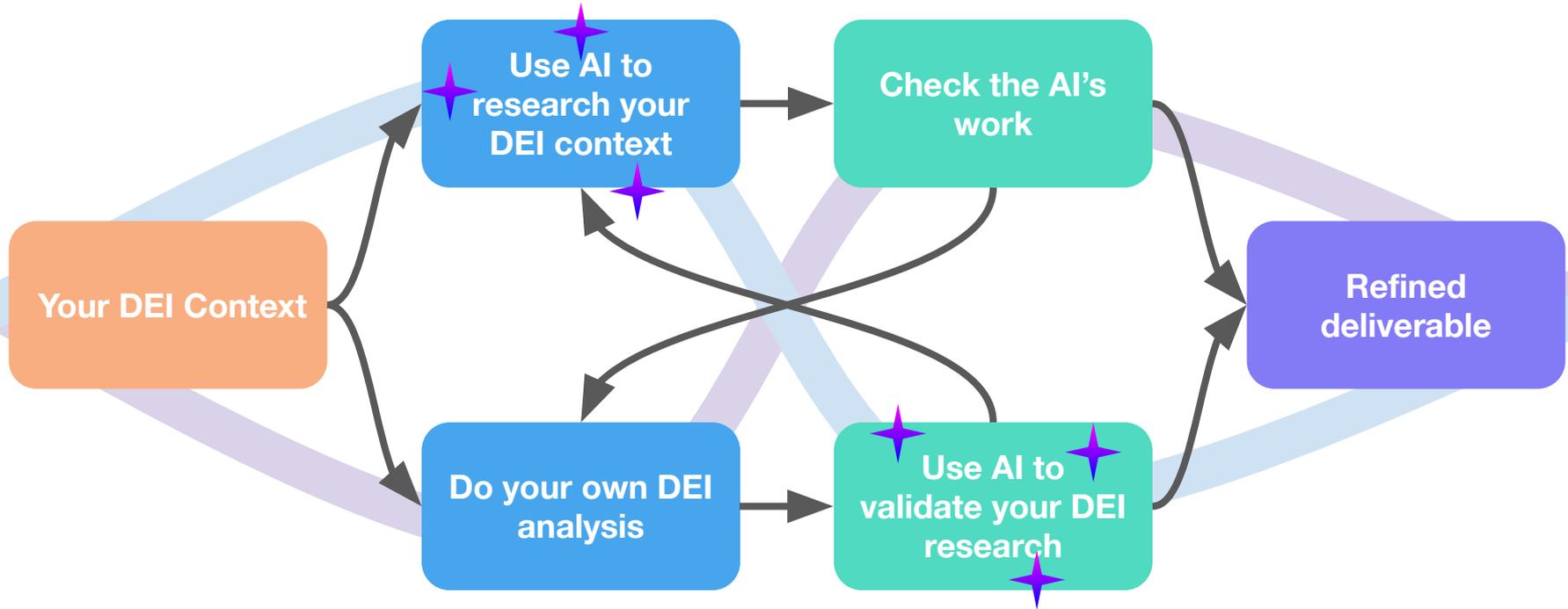
## Start Small, Make an Impact

Even 2-3 of these methods can significantly enhance your DEI and stakeholder analysis, aligning your grant proposals with funder priorities.

## Try this format

In order to strengthen my proposal, I need to do a [Racial Equity Impact](#) as part of my overall [DEI analysis](#) for the grant proposal I'm writing for [XYZ Program](#).

# AI is Weirdly Great at DEI Analysis



# AI Does Great Stakeholder Analysis

## Identify

Who are our  
stakeholders?

## Analyze

Interest  
Influence  
Needs

## Categorize

High/Low  
Influence/Interest

## Strategize

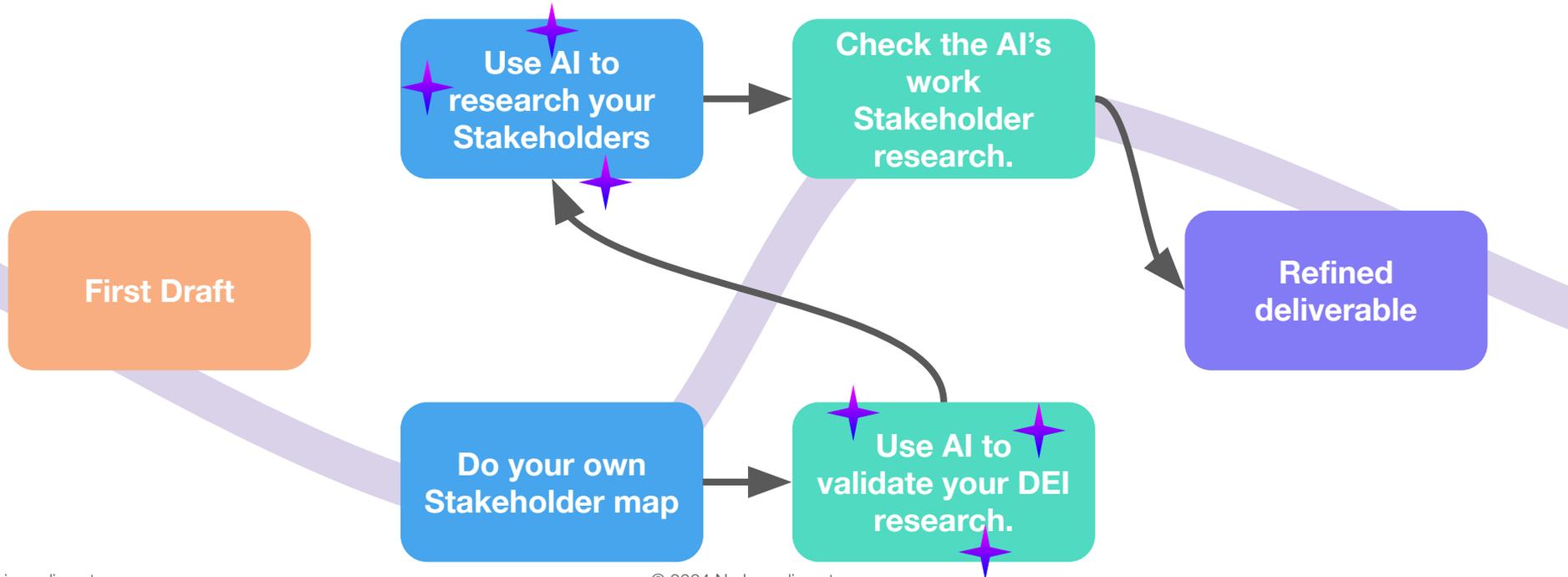
Inform  
Consult  
Collaborate  
Empower

Using what I've told you so far about my initiative, help me analyze these stakeholders - specifically, tell me about their needs.



# AI Does Great Stakeholder Analysis

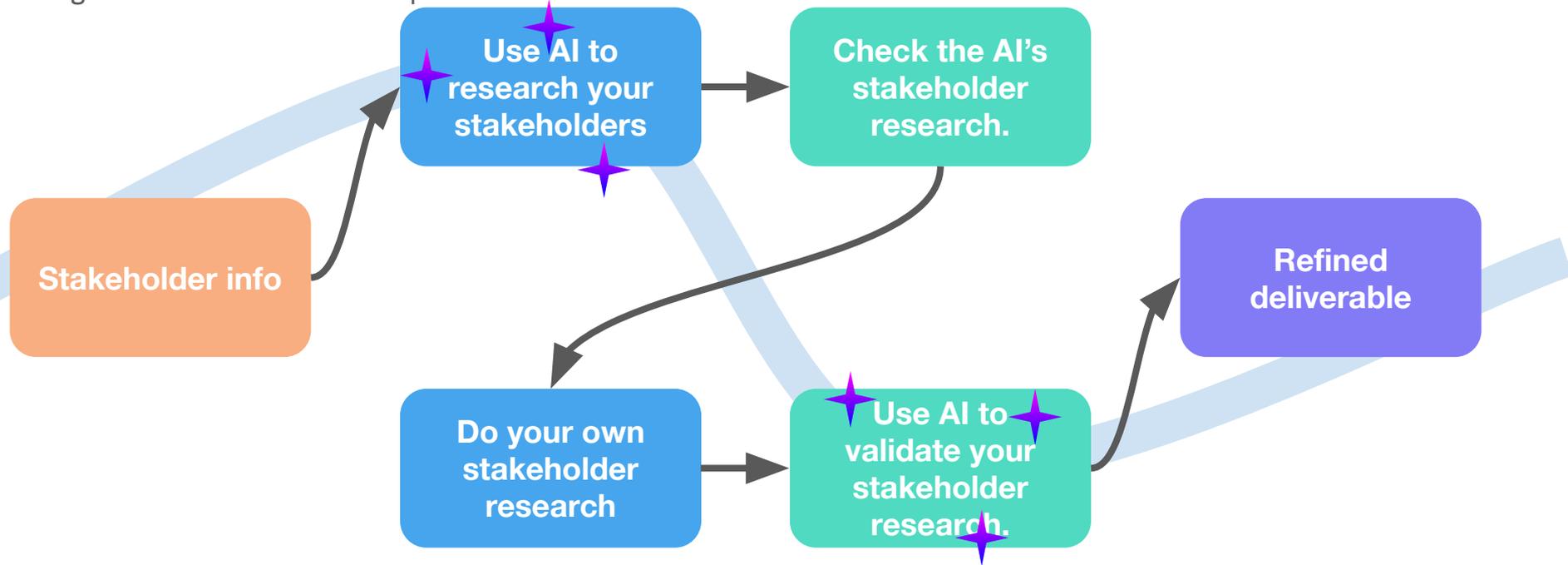
Using what I've told you so far about my initiative, let's dig into the stakeholders for this next initiative. Please draft a thorough analysis of the stakeholders I've identified: [\[list\]](#)





# AI Does Great Stakeholder Analyses

Using what I've told you so far about my initiative, let's dig into the stakeholders for this next initiative. Please proofread my stakeholder analysis to spot any omissions or errors, and suggest changes where needed. Be specific.





# Activity - Use AI for Stakeholder and DEI Analysis

1. Using either a hypothetically “real” program or your notthisagain.org madlib from the earlier activity, run a brief stakeholder analysis (1 or 2 stakeholders) for the initiative using AI.
2. In one case, write a very short summary of some made-up research and refine it using AI.
3. In the other case, use AI to do the rough draft.

Alternative: You can also use real world examples from your own organization in lieu of our silly but illustrative madlibs.

## Reflection

**Which AI method aligns best with your current grant writing, and how could you adapt it to meet your nonprofit's needs?**

**Save any prompts you used that really worked well for you.**

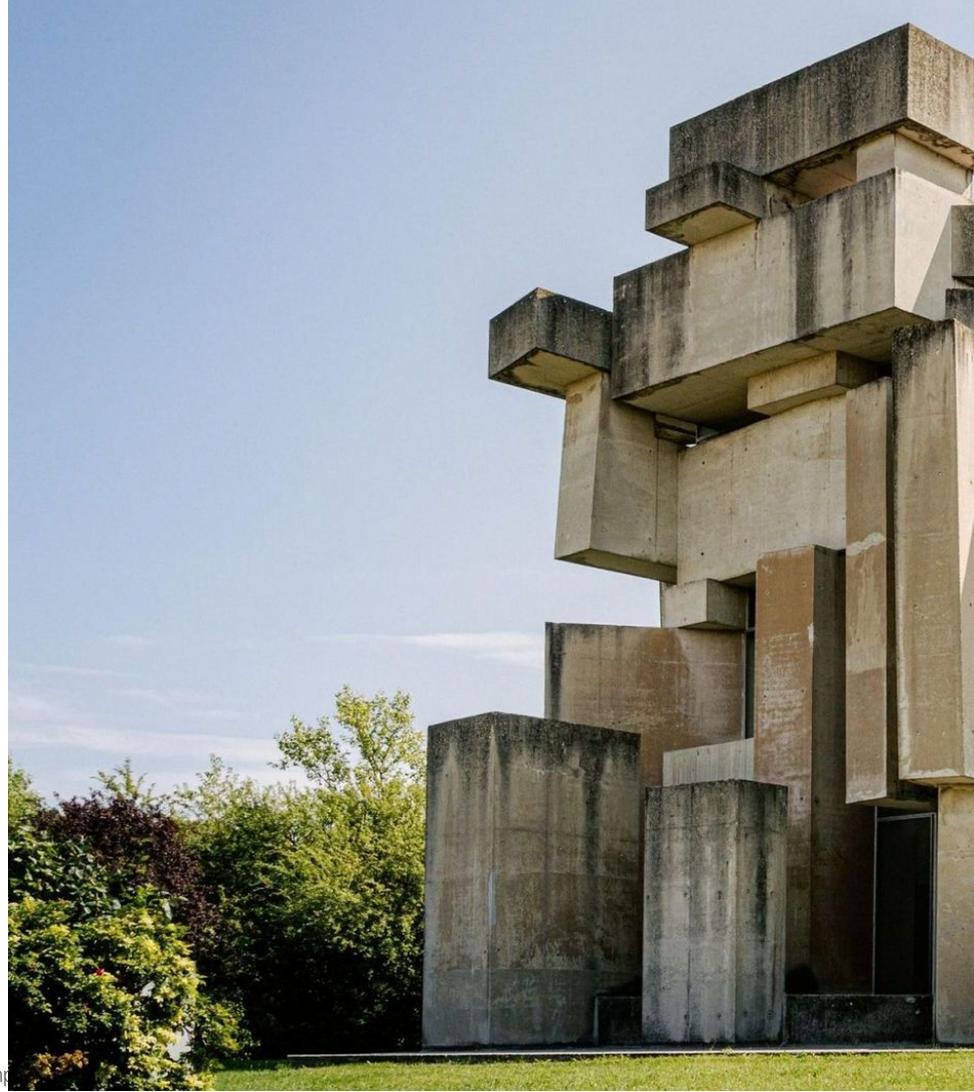


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# Messaging and Capabilities



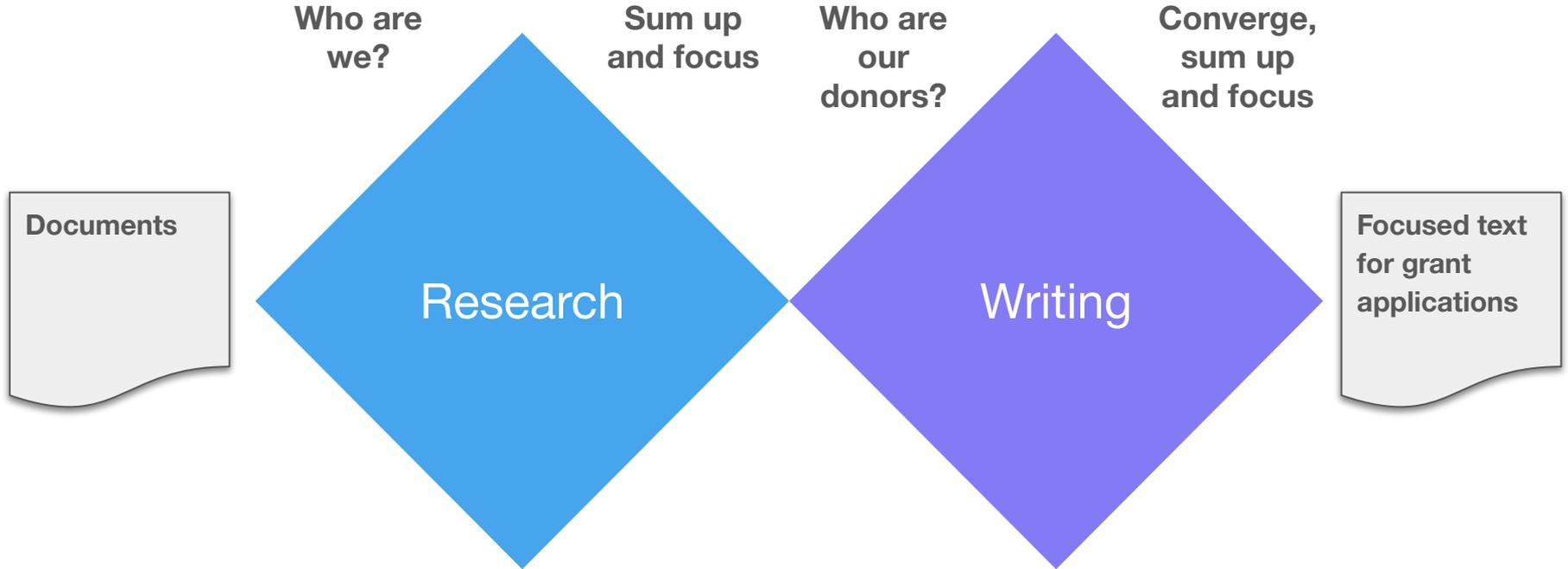


# In this Section

1. AI reads your impact reports so you don't have to
2. Sell your capabilities like a boss
3. AI is a donor research rock star
4. Adapting donor messaging with AI
5. Activity - Donor profile summary

**TLDR:** AI can help you get to know your org's capabilities better and find the best way to tell others about them, especially donors. Use AI to quickly improve on your message where it counts most.

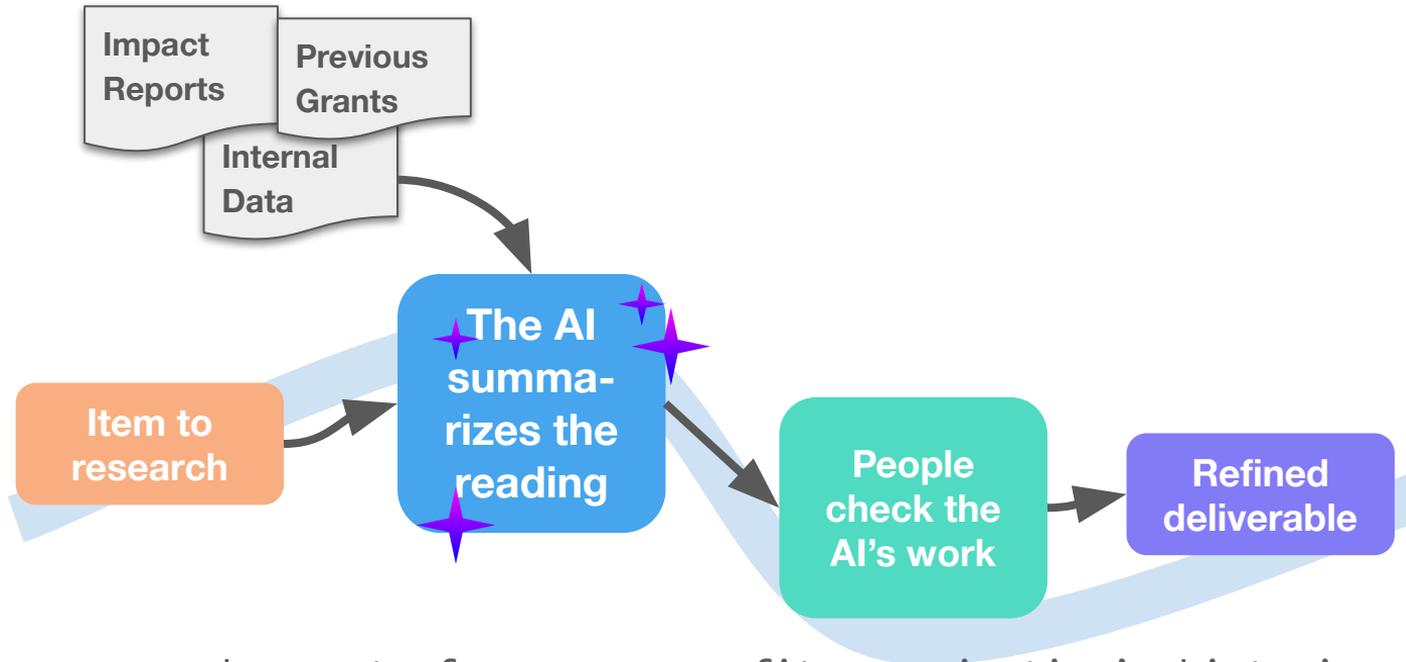
# Building a Focused Message





# AI Reads Impact Reports So You Don't Have To

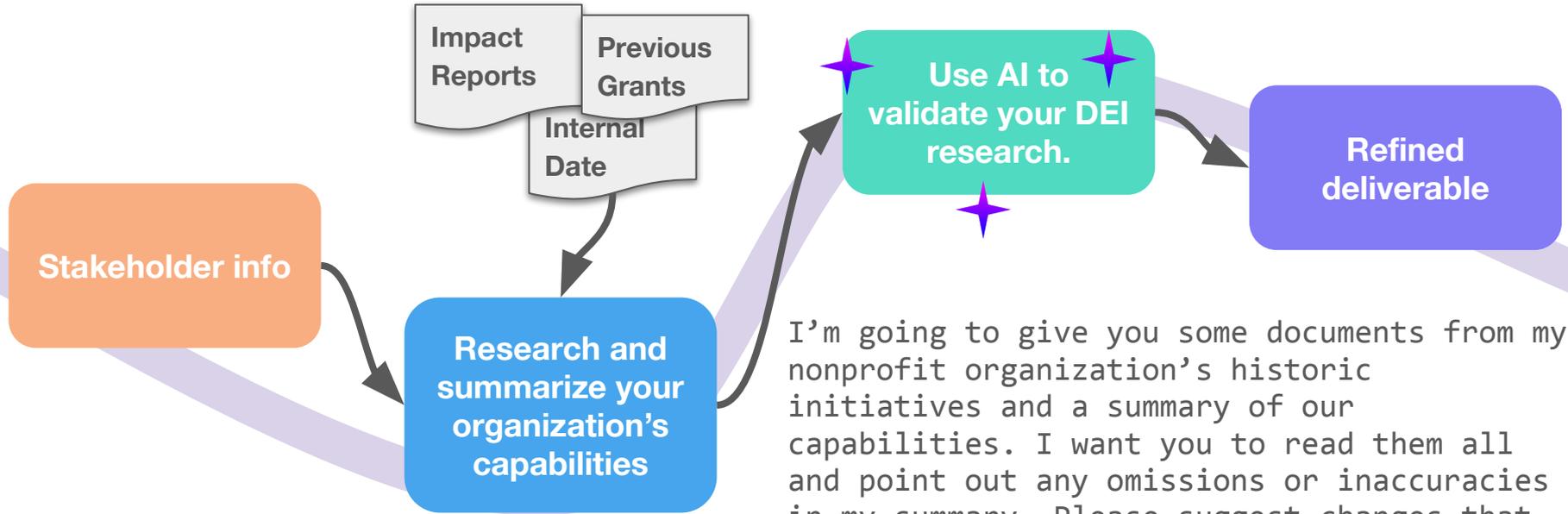
Assemble existing documents and sources to upload when prompting.



I'm going to give you some documents from my nonprofit organization's historic initiatives. I want you to read them and give me three alternate versions of a two-paragraph summary of our capabilities, citing supporting examples from the documents.



# AI Sells Your Capabilities Like a Boss



I'm going to give you some documents from my nonprofit organization's historic initiatives and a summary of our capabilities. I want you to read them all and point out any omissions or inaccuracies in my summary. Please suggest changes that would strengthen this summary for the purposes of the grants described earlier. Be specific.

# AI is a Donor Research Rock Star

**Priorities** and  
focus areas

**History** and  
patterns of  
funded projects

**Guidelines** &  
formats for  
applying

**Timeline** &  
process for  
decisions

**Reputation** and  
network,  
affiliations, etc.

**Sensitivities**  
and risk  
vulnerabilities

I'm applying for a grant from the SO AND SO FOUNDATION to do THIS ONE THING. Tell me about their history and how that intersects my program's purpose and goals in the attached doc (or pasted below).



# Adapting Donor Messaging with AI

## Donor Profile Summary

Priorities

History

Guidelines

Timeline

Reputation

Sensitivities

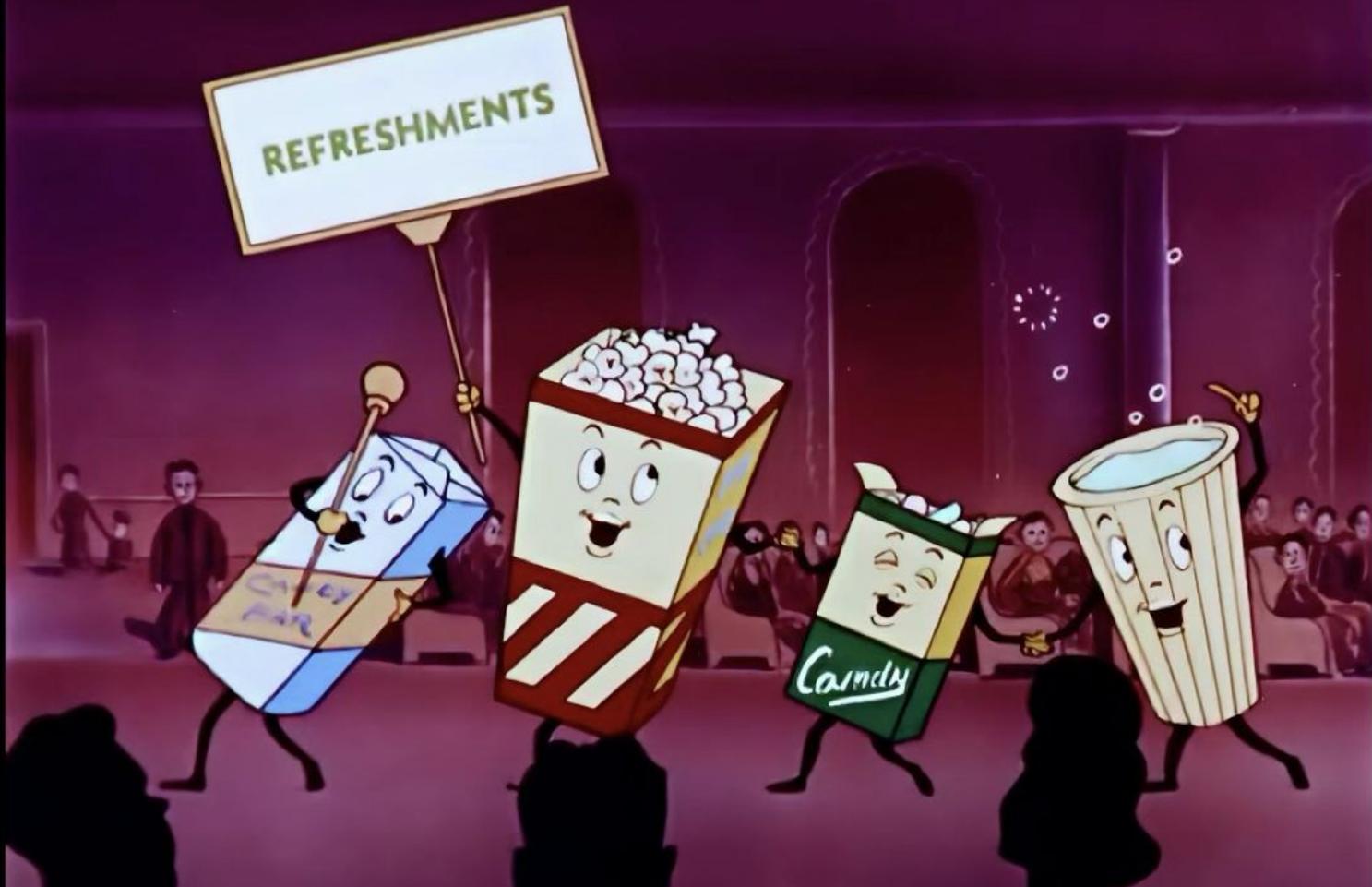
**Sample grant application question:** How is your organization well-positioned to be successful? You may include relevant partnerships, staff expertise, ongoing work, etc.

**Your  
program  
goals and  
vision**

**Messages  
adapted to the  
donor**

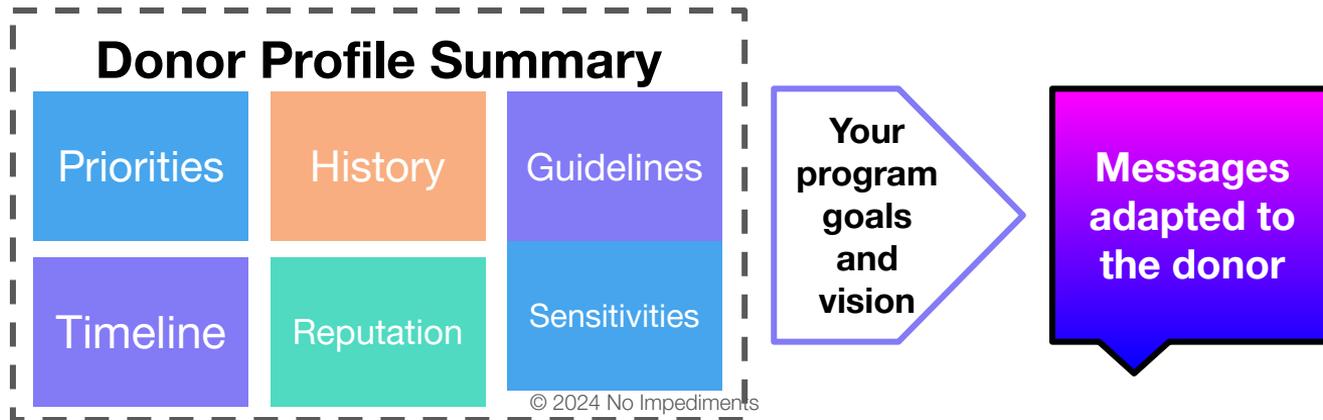
I've attached summaries of my program goals and vision; my organization's capabilities; and my donor's profile. Please use these attachments to adapt my program summary to the donor profile and this application question: "[insert here]". Make the output about 250 words.

REFRESHMENTS



# Activity - Donor Profile Summary

- Pick a funder you may plausibly reach out to.
- Use AI to research all 6 dimensions of their donor profile, as well as any other areas of interest for your proposal.
- Then use the AI to summarize this research into a tight 3 paragraph, 100-word donor profile.
- Use the AI again to adapt a description of a real program in your organization to the donor's profile.
- Then adapt that material to answer specific grant application questions. Examples are available if you need any.



# Discussion & Reflection

**What surprised you most in this process?**

**What constraints frustrated you most?**

**How else might you apply these methods?**

**Who else could benefit from learning this?**

**Save any prompts you used that really worked well for you.**



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# Summary

We've taken a few tough bits of the grant writing process and sped them up with AI tools.

You've developed an intuitive sense for how to refine and condense AI outputs, and incorporate them into the next stage in your research.

These skills will help you throughout the process, not just in the areas we tried.

They can also help you with other back-office functions in your org:

- Job descriptions
- Process docs
- Monitoring plans
- Status updates



FREE



PARKING

20

AVENUE

NE  
AVE



# Chris Leonard



No Impediments

Building high-performing teams around complex problems for clients and causes of all shapes and sizes

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Executive Coaching ♦ Training ♦ Facilitation ♦ Workflow Design ♦ Workforce Planning ♦ Program Management