

Using Thoughtful AI Adoption to Create Time for Mission-Driven Work

November 19, 2025



Hello!



Remy Reya

Director of AI & Thought
Leadership, Compass Pro Bono



- **What I've led at Compass Pro Bono:**
 - AI use case mapping/platform scoping
 - AI policy creation (staff & volunteers)
 - AI trainings, office hours, & troubleshooting
 - AI tool pilots & org. value assessments
- **My training background:**
 - Executive Certificate: Making AI Work (MIT)
 - AI Trainers Bootcamp (AI for Non-Techies)
 - Other AI trainings from HQforAI, Google, CNA
 - Applied experience consulting for nonprofits on AI
- **What I've done on my own time:**
 - Read several books on AI
 - Listen voraciously to AI podcasts
 - Keep up with dozens of AI newsletters/experts
 - Spend 100s of hours experimenting with AI tools

Today's micro-session (before our Q&A)

1. Why AI? (*re: AI ethics*)
2. Responsible AI implementation & culture-building (*re: rushing in*)
3. Best practices for using AI in your work (*re: falling behind*)

TODAY'S GOAL: you will walk away confident about how to create, or contribute to, a strong culture of thoughtful AI integration at your nonprofit (+ a micro-action ready!)

Intro

Why AI?

*defining the value-add
for mission-driven orgs*



generated with ChatGPT 4o

First: AI is here, and it's here to stay.

- 800M+ people use ChatGPT weekly (faster adoption than smartphones!)
- More than 90% of Fortune 500 companies use OpenAI products
- Amazon/Alphabet/Microsoft/Meta plan to invest >\$400B in AI this year

Plus, AI is already in your toolkit (whether you realize it or not): 

- Gmail's Smart Inbox / Smart Compose → AI-powered
- Google Search results → AI-driven ranking & AI summaries
- Salesforce, monday.com, MailChimp, etc. → AI features baked in

And the growth isn't slowing down. (In fact, it's accelerating exponentially.)



However...

Some Say AI Is the
Greatest Invention of
All Time. I Don't Get It

People
life. Si

OPINION
GUEST ESSAY

Press Pause on the Silicon Valley Hype Machine

May 15, 2024

It's Time for a 2025 AI Heat Check: Is it
Delivering or 'Overhyped'?

'Foolhardy at best, and deceptive and
dangerous at worst': Don't believe the hype
— here's why artificial general intelligence
t the billionaires tell you it is

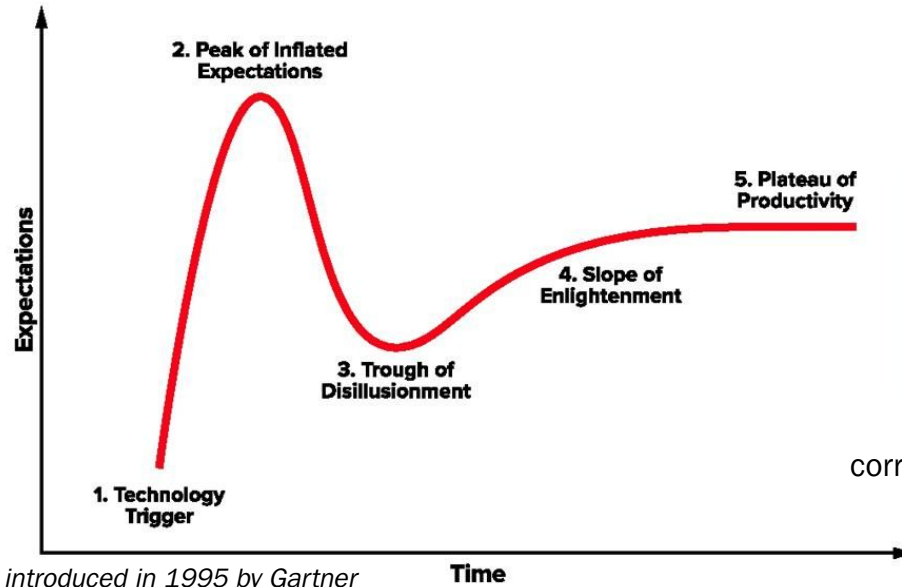
M. Bender, Alex Hanna published June 4, 2025

is why AI may be overrated

1:30 AM ET

We are living through this:

Gartner Hype Cycle



← tl;dr on almost every claim about AI, the truth is likely somewhere in the messy middle...

...which means that thoughtful, correctly-paced AI integration is critical.



What's possible when AI is harnessed responsibly?

Case Study: Compass Pro Bono



Spring/Summer '24

Groundwork (prep):

- Use case IDing
- AI tool scoping
- AI workshop (HQ)
- AI policy creation (staff/volunteers)

Oct '24 – Feb '25

Iteration (trial period):

- AI tool rollout
- AI Slack channel
- AI “office hours”
- Experimentation
- Use case sharing

Mar '25 & Beyond

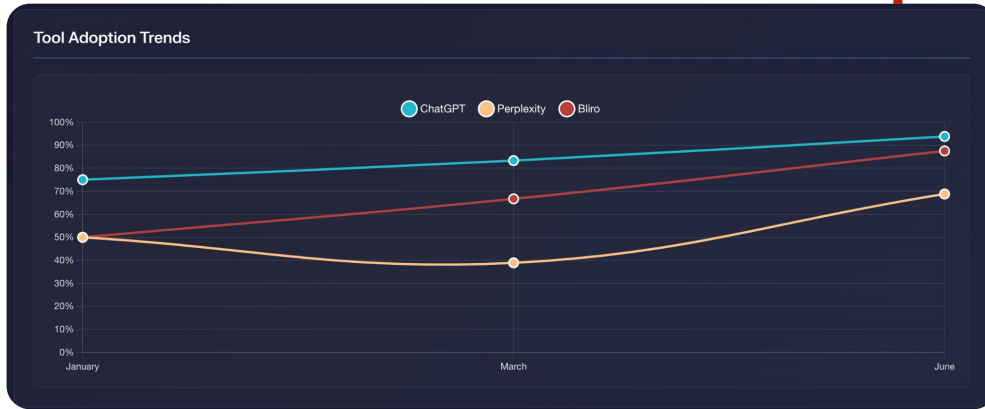
Scale (growth period):

- Regular team surveys
- Weekly AI debriefs
- New AI tools
- AI staff + intern roles
- Grant applications



What's possible when AI is harnessed responsibly?

Tool adoption (Jan '25 – June '25):

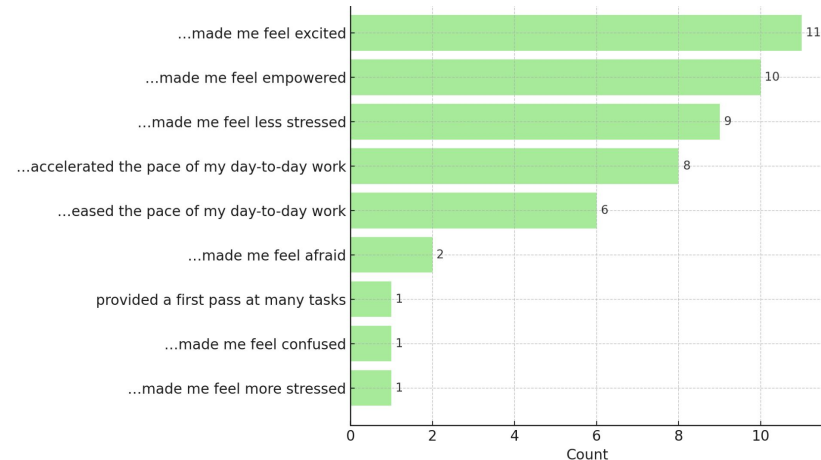


generated with Perplexity Labs

100% of our team now uses AI regularly.

Feelings toward AI (June '25):

So far, using AI at Compass has... (June 2025)



What's possible when AI is harnessed responsibly?

Self-Reported Individual Time Savings using AI (avg.):

October '24: Launch → January '25: 4-5 hours/week → June '25: 10-12 hours/week

Examples of AI use cases at CPB:

- **All:** Meeting note-taking →
- **Data:** Volunteer survey analysis →
- **Brand:** Media pitches, conference apps →
- **Comms:** Social media/email content →
- **Programs:** Volunteer matching help →
- **Operations:** IT policy drafting →
- **Fundraising:** Prospecting research →

Where can those 10-12 hours go?

- **All:** Taking action on meeting notes
- **Data:** Follow-up interviews with volunteers
- **Brand:** Creating thought leadership *content*
- **Comms:** Engagement with community
- **Programs:** Final-pass curation of teams
- **Operations:** CPB-specific provisions
- **Fundraising:** Prospect cultivation



Two elephants in the room

*What about
the cost?*



*What about
the cost?*



- NP Discounts
- License-Sharing
- **Framing:** AI as an efficiency multiplier

“If AI could save each of our team members 5 hours/week, how much \$ would that be worth?”

- Evolving Tech
- Visibility > Secrecy
- Ethical Use Policies
- Literacy → Efficiency

AI is here to stay. Understanding it allows you to steer it in alignment with your values; abstaining entirely does not.

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(Check the appendix for a more detailed breakdown of these topics!)



And, importantly:

Everyone here is considering using AI to advance a mission.

How different would the world look if your organization (and every nonprofit like it) could move 2x as fast without needing 2x the budget?

How different would our sector look if we could actually “right-size” our people’s workloads and reduce burnout/turnover among nonprofit staff?

Used properly, AI could be part of that.



Our Responsible AI Integration Framework



1.0: Groundwork

Champions

Norms

Mindset

Use Case Mapping



2.0: Iteration

Habit-Building

Experimentation

Lesson-Sharing



3.0: Scale

Training

Knowledge-Building

Customization



4.0: Agency

Automation

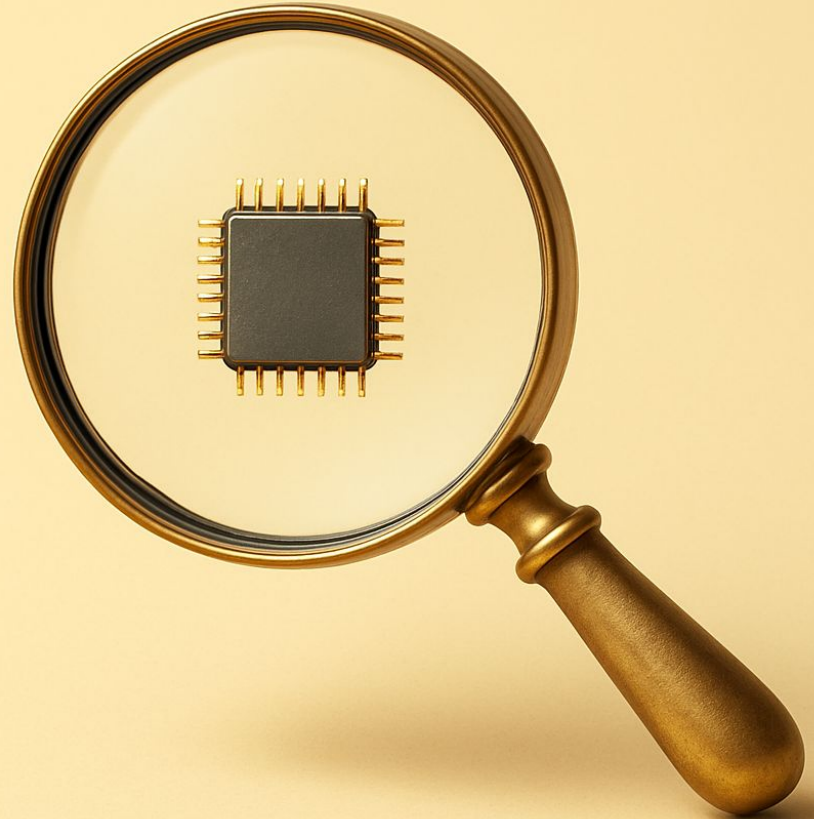
Task Deployment

Decision-Making

Phase I: Groundwork

1: Identify Use Cases

(what are we actually using AI for?)



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Activity: Divvy up your day-to-day

Forget about AI and automation for a minute.

Think about a project or task you have to work on often.

Break it down into 3-5 discrete steps.

Label each **step** and **transition** (between steps) as one of the following:

B Needs my brain, not my hands (e.g., determining grant opportunity fit)

H Needs my hands, not my brain (e.g., moving spreadsheet data to CRM)

B H Needs my brain & hands (e.g., cutting words from a grant application)



Activity: Divvy up your day-to-day (ex.)

Example Task: Applying for a grant



1) Find grant opportunities



2) Add grant details to spreadsheet, calendar



3) Draft & proofread grant application



4) Submit application & log in Salesforce



5) Update Salesforce when notified of status

⇒ brain-heavy upfront, less later



Activity: Divvy up your day-to-day

B Good candidate for AI augmentation // **H** Good candidate for automation

When you do this exercise, notice:

- 1) Our work rarely stays solely on our own plate (by design).
- 2) Most tasks needs your brain and your hands...but not both at every step.
- 3) You probably spend a lot of time on things that don't *really* need your brain.

The goal is to use AI & automation to strike an intentionally-calibrated balance between brain-work and hands-work.



Use Case Mapping – clarifying the “what”

we scoped:

← **platforms**

&

use cases →

*...then matched
them up.*

	A	B
1	Category	Use Case
2	Optimizing efficiency in rote tasks/manual labor	Analyzing program data for trends (like sentiment analysis of survey data)
3	Optimizing efficiency in rote tasks/manual labor	Creating visualizations of program data trends
4	Optimizing efficiency in rote tasks/manual labor	Answering frequently-asked questions from volunteers/clients (when fed repository of help guides/FAQ resources) – external chat bot
5	Optimizing efficiency in rote tasks/manual labor	Answering frequently-asked questions from program staff (when fed repository of help guides/FAQ resources) – internal chat bot
7	Jumpstarting creative work	Drafting grant applications
8	Jumpstarting creative work	Drafting donation solicitation language
9	Jumpstarting creative work	Drafting marketing language for emails, social media
10	Jumpstarting creative work	Drafting graphics/visuals for emails, social media
11	Jumpstarting creative work	Drafting graphics/visuals for internal/external presentations
12	Jumpstarting creative work	Drafting OT engagement letters (when fed client application, scoping call notes, and engagement letter template)
13	Jumpstarting creative work	Drafting “playbooks” based on existing process documents
14	Identifying new opportunities (research)	Identifying viable grant opportunities
15	Identifying new opportunities (research)	Identifying conferences/meetings we may want to attend
16	Identifying new opportunities (research)	Identifying awards we may want to apply for
17	Identifying new opportunities (research)	Identifying thought leadership platforms we may want to seek out
18	Identifying new opportunities (research)	Identifying sources of subsidized interns/fellows for added capacity (incl. university programs)
19	Identifying new opportunities (research)	Identifying tech platforms that can eliminate friction and streamline our work
20	Identifying new opportunities (research)	Identifying professional or volunteer orgs/associations/groups we may want to network with in order to expand or diversify our volunteer pool providing volunteers examples of templates, research qs, meeting agendas, etc... from prior projects in same service line
21	Jumpstarting creative work	Knowledge base - identify toolkit files with xyz, searches through them
22	Jumpstarting creative work	summarizing volunteer interviews or research
23	Jumpstarting creative work	drafting grant reports
24	Optimizing efficiency in rote tasks/manual labor	drafting case studies
25	Optimizing efficiency in rote tasks/manual labor	Doing preliminary volunteer-client matching, before we check
26	Optimizing efficiency in rote tasks/manual labor	Donation data entry (some of which is already automated)
27	Optimizing efficiency in rote tasks/manual labor	Internal scheduling tasks
28	Optimizing efficiency in rote tasks/manual labor	

Phase II, III: Iteration/Scale

2: Prompt Like a Pro

*(how do we use our
LLMs effectively?)*



generated with ChatGPT 4o

Using AI Well: The CRAFT(ING) Framework

“Context engineering” for LLMs is like managing a high school intern.

Context	//	What would someone need to know to do this well?
Role	//	What kind of expert would be most helpful?
Action	//	What exactly do I need done?
Format	//	What kind of output do I need?
Target Audience	//	Who needs to see this when it's done?
~~		
Iterate	//	What immediate feedback do I have on this output?
Nudge	//	What tweaks would make it 10% better?
Guide	//	What's needed to get past the finish line?



Lesson-Sharing – normalizing AI use

AI learning should be a team sport.
One person's roadblock becomes everyone's lesson; another person's win becomes everybody's inspiration.

Exercise: Set up a Channel or Hub

Act on one (or make up your own):

- *Set up a Slack/Teams channel for AI testing + sharing.*
- *Create a shared Google Doc/Notion page for AI learnings.*
- *Add AI Show-and-Tells to a recurring team meeting.*



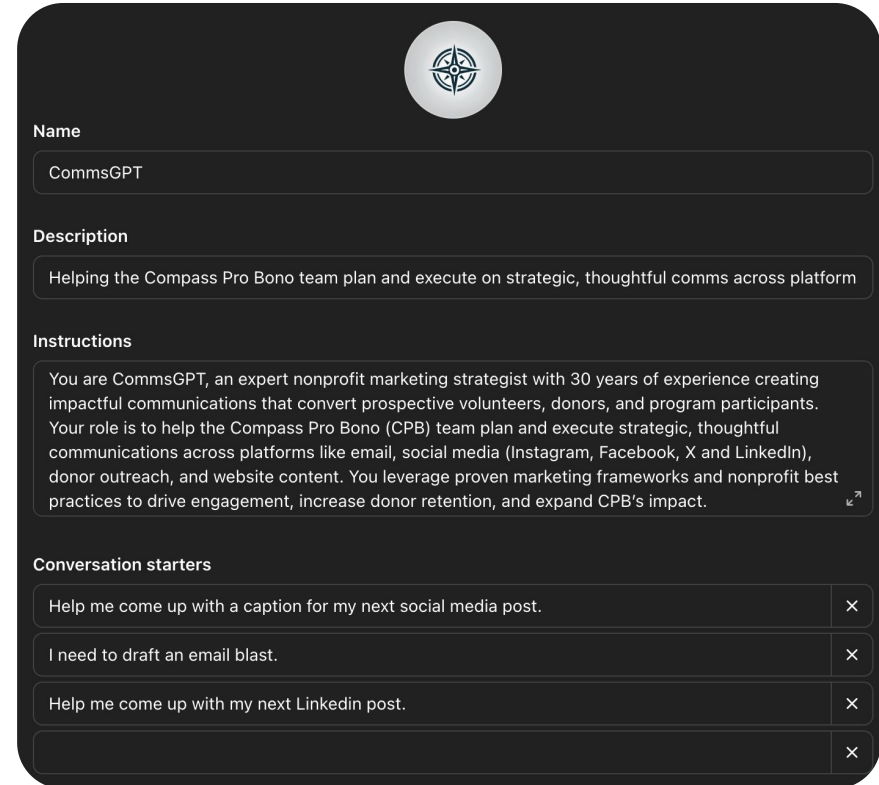
Knowledge-Building & Customization

AI is a pattern replication tool.
The more context it has...
The more you direct its attention...
The more structured your ask...
...the better the output will be.

**

Tip: Set up Custom GPTs for different org functions.

- Comms GPT
- Grant App GPT
- Impact Story GPT
- Training Script GPT
- Media Pitch GPT



The screenshot shows a dark-themed interface for a custom GPT named 'CommsGPT'. At the top is a circular icon with a compass rose. Below it, the 'Name' field contains 'CommsGPT'. The 'Description' field contains the text: 'Helping the Compass Pro Bono team plan and execute on strategic, thoughtful comms across platform'. The 'Instructions' field contains a detailed prompt: 'You are CommsGPT, an expert nonprofit marketing strategist with 30 years of experience creating impactful communications that convert prospective volunteers, donors, and program participants. Your role is to help the Compass Pro Bono (CPB) team plan and execute strategic, thoughtful communications across platforms like email, social media (Instagram, Facebook, X and LinkedIn), donor outreach, and website content. You leverage proven marketing frameworks and nonprofit best practices to drive engagement, increase donor retention, and expand CPB's impact.' Below the instructions is a section titled 'Conversation starters' with three example prompts, each with a close button (X): 'Help me come up with a caption for my next social media post.', 'I need to draft an email blast.', and 'Help me come up with my next LinkedIn post.' There is also an empty text input field at the bottom with a close button.

Name

CommsGPT

Description

Helping the Compass Pro Bono team plan and execute on strategic, thoughtful comms across platform

Instructions

You are CommsGPT, an expert nonprofit marketing strategist with 30 years of experience creating impactful communications that convert prospective volunteers, donors, and program participants. Your role is to help the Compass Pro Bono (CPB) team plan and execute strategic, thoughtful communications across platforms like email, social media (Instagram, Facebook, X and LinkedIn), donor outreach, and website content. You leverage proven marketing frameworks and nonprofit best practices to drive engagement, increase donor retention, and expand CPB's impact.

Conversation starters

Help me come up with a caption for my next social media post. X

I need to draft an email blast. X

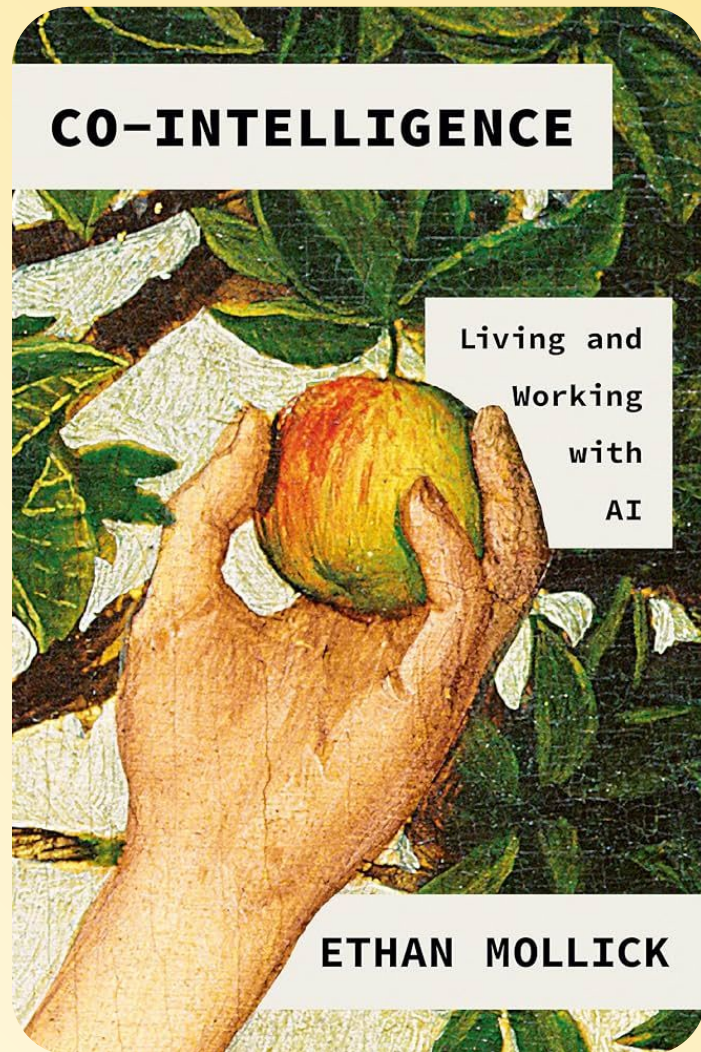
Help me come up with my next LinkedIn post. X

X

Phase IV: Agency

3: Create Co-Intelligence

*(how are we thinking
about deploying AI
responsibly?)*



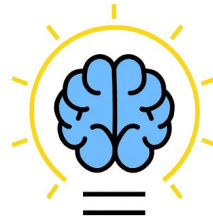
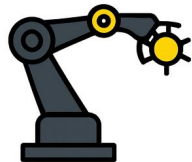
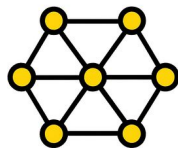
AI vs. Automation vs. Human Brains

AI's strengths: pattern recognition + replication »

Automation's strengths: execution of rote/mechanical processes ↻

Our strengths: creative design, critical thinking, relational work ⇔

Goal: co-intelligence (we embrace AI/automation's strengths + lean into ours)



Understanding Loops (not the Froot kind, sorry)

Human-above-the-loop (HATL)



Human-above-the-loop (HATL): Humans define strategy for AI/automation – policy, governance, DOs and DON'Ts, etc.

Human-in-the-loop (HITL)



Human-in-the-loop (HITL): AI/automation advance processes *to a point*, humans make critical decisions to push them past the finish line

Human-on-the-loop (HOTL)



Human-on-the-loop (HOTL): AI/automation advance processes & make decisions, humans monitor *process* for quality & intervene if needed

Human-behind-the-loop (HBTL)



credit: GPT-5 (1st try)

Human-behind-the-loop (HBTL): AI/automation advance processes & make decisions, humans monitor *outputs* for quality & adjust system

Example: Personalizing fundraising letters

Human-above-the-loop (HATL)



Human-above-the-loop (HATL): We decide how AI and automation should fit into our fundraising strategy based on our mission/values.

Human-in-the-loop (HITL)



Human-in-the-loop (HITL): AI helps us pull together donor info and suggests draft language, then we customize and send the letters.

Human-on-the-loop (HOTL)



Human-on-the-loop (HOTL): AI creates personalized letters and sends directly to donors; we monitor in real time and jump in if needed.

Human-behind-the-loop (HBTL)



Human-behind-the-loop (HBTL): AI creates personalized letters and sends directly to donors; we check quality after the fact & take action.

credit: GPT-5 (1st try)

Norms – articulating the “how”

Exercise: WILLS and WON'Ts

Come up with 1 WILL and 1 WON'T to succinctly capture your AI approach.

For example:

- I **WILL** use our org's enterprise accounts to log into AI tools.
- I **WON'T** use AI to make decisions related to employment (incl. hiring, discipline, suspension, termination, promotion, demotion, or salary).

People already use AI, even when they're “not supposed to.”

As leaders, the onus is on us to choose transparency over secrecy and to create policies that ensure mission-aligned use of AI (preserving security *while* reducing friction in staff AI use).



You will need to answer the question: Where do our humans sit in the loop?

Be intentional about this choice.

(And pace the progression in a way that builds trust, instead of breaking it.)



4: Staff POV

*(What it's like
to receive!)*

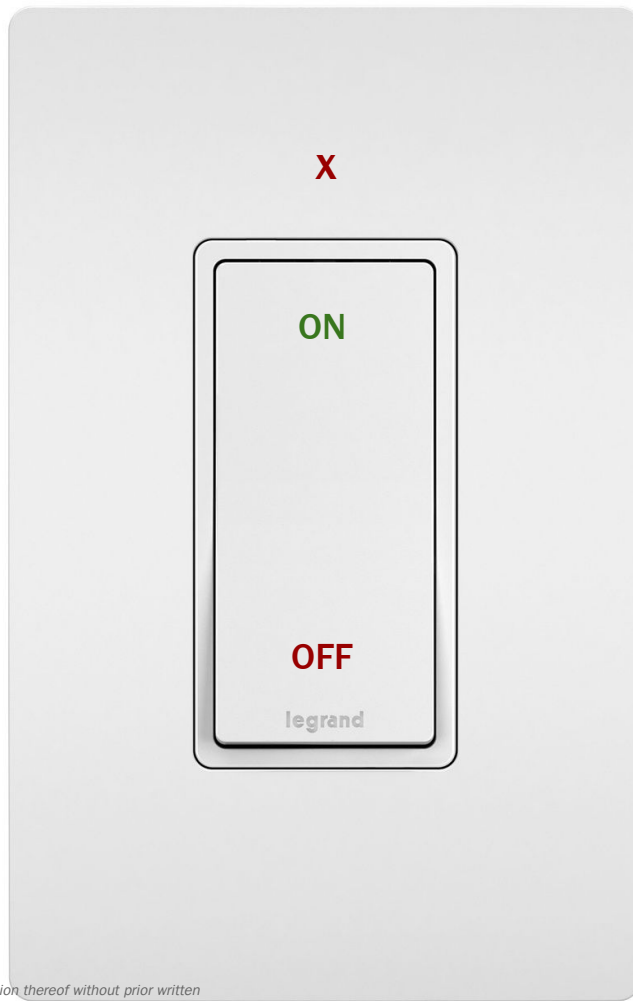


Beverly Ross
Program Director, DC



Think of AI integration as a dimmer switch.

You don't need to be “all in” or “all out.” Treat AI as a tool whose presence in your work you can—and should—iteratively assess and ratchet up/down responsively.





One last note:
***Don't stumble
onto AI's impact
treadmill.***

Nonprofit staff are already stretched thin. Before “10xing your impact with AI,” give people back time to be human.



Some suggested resources...

NTEN: [Nonprofit AI Resource Hub](#)

→ videos on AI evaluation, governance, and integration at nonprofits

Some books to go deeper...

- Ethan Mollick's [Co-Intelligence](#) (primer)
- Stuart Russell's [Human Compatible](#) (deep)
- Karen Hao's [Empire of AI](#) (ethics, industry)

Vanderbilt: [Generative AI for Leaders](#)

→ self-paced learning modules focused on using and championing AI as a leader

CPB: [Facilitated Retreats & AI Sprints](#)

→ “low bono” AI support tailored to the organization’s needs + comfort with AI

compassprobono.org/ai



...and a few more we curated for you!



AI Resources for Nonprofits (curated by *Compass Pro Bono*)

AI Workshop Materials + Replay (from March 2025)	📌 Slide Deck (PDF) 📌 Recording (w/ transcript + chat replay)
BONUS Resources	📌 [TEMPLATE] AI Platform Guidance for Staff – a templated version of a resource we created in-house for the Compass Pro Bono team. 📌 [TEMPLATE] Sample AI Policies/Guidelines for Staff – there are plenty of AI policy templates out there. For example, here's a very short set of guidelines from Rich Leimsider, and here's a longer, full policy template from NTEN. FastForward offers this AI Policy Builder for nonprofits, too. 📌 [TOOLS] Helpful Baseline AI Platforms – we use ChatGPT, Perplexity, and Bliro (nonprofit pricing information linked for each). <i>If you try out Bliro for AI-powered</i>

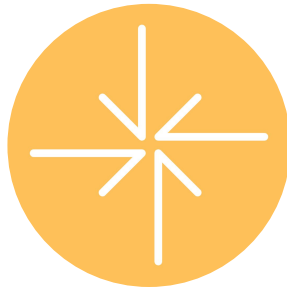
To get them, just fill
out the micro-form
at the end!



Questions? Reach out!

**We'd love your feedback on this workshop!
Please take a moment to fill out the survey
when it pops up on your screen post-Q&A.**

*(Once you fill it out, you'll get our AI
resource library and a link to book
time on Remy's calendar to talk AI!)*



Compass Pro Bono

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 Beverly Ross

APPENDIX



Let's talk about dollars and cents

How to make AI affordable (and justify the expense to your team/board):

- 1) Take advantage of free trials and free courses. (I'll share some later!)
- 2) Apply for nonprofit discounts. (*if you can't find one, reach out to the company*)
- 3) Reframe the conversation to **AI as an efficiency multiplier**: "If AI could save each of our staff 5 hours per week, how much \$ would that be worth?
 - a) *Unlike* many other softwares, AI's impact can cut across nearly all functions.
 - b) **Center the work-time benefits**: How much time are you saving on admin tasks? How much space could AI open up for your staff to focus on the work that *needs* their brains?



Digging into the ethics of AI

Concerns	Realities
Environmental Impact: AI models use a lot of computing power (which draws on a lot of energy/water).	Impacts of individual use are <u>negligible</u> . The real issue? <u>Data centers</u> . What we really need is <i>pressure</i> on, Microsoft, Google and others.
Job Loss/Displacement: AI's capabilities have already led to mass layoffs at major companies opting for automation.	AI proficiency might become a required skill set for your work. AI is <u>best used</u> to <i>supplement</i> human expertise—not erase it.
Bias & Hallucinations: AI inherits biases from training data; it can generate misleading, inaccurate, or offensive content.	AI literacy is critical. AI-generated content is already <u>everywhere</u> . Understanding AI lets you spot biases and rein it in where needed.
Security & Privacy Risks: AI can expose sensitive data and create cybersecurity vulnerabilities for organizations.	Policies, guidance, and enterprise access reduce these risks. <u>People already use AI</u> . We just have to choose transparency or secrecy.
Copyright Issues: AI-generated content raises concerns about intellectual property and who should be able to use what.	Regulations are catching up. AI copyright laws are <u>evolving</u> , and many companies are cementing <u>content partnerships</u> with AI orgs.
Overreliance: People using AI tools can begin to depend on them for the completion of their work over time.	This is true of all new tech. Calculators, computers, and CRMs all changed how we work. As users, our job is to verify and qualify.

USING AI WELL:

The CRAFT(ING) Framework

BASE PROMPT: *ChatGPT, write me a caption for Giving Tuesday.*

A

F

C

- C  Context
- R  Role
- A  Action
- F  Format
- T  Target Audience

Analysis: Our prompt suggests an action (write a caption) and a general format (caption), but lacks meaningful context. We'll probably get a fairly generic Giving Tuesday caption as a result.



USING AI WELL:

The CRAFT(ING) Framework

MODIFIED PROMPT (v1): ChatGPT, write me a caption for Giving Tuesday that helps our volunteers understand how their \$10 donation turns into \$20.

A

F

C

T

- C  Context
- R  Role
- A  Action
- F  Format
- T  Target Audience

Analysis: We've added meaningful information about our target audience and framing, which should get us closer to a solid output. We still lack specificity in the context, role, and format.



USING AI WELL:

The CRAFT(ING) Framework

MODIFIED PROMPT (v2): *You're a veteran nonprofit social media specialist. Write*

a concise, bulleted caption for Giving Tuesday that helps our volunteers

understand how their \$10 donation turns into \$20.

- C  Context
- R  Role
- A  Action
- F  Format
- T  Target Audience

Analysis: We've now given our LLM a more precise format and a persona, which should help direct its attention toward relevant reference or training data. This should get us 80% of the way.



USING AI WELL:

The CRAFT(ING) Framework

MODIFIED PROMPT (v3): *You're a veteran nonprofit social media specialist. I've*

attached our past captions and LinkedIn analytics for reference; using our tone and

what resonates with our volunteers, write a concise, bulleted caption...

- C**  **Context**
- R**  **Role**
- A**  **Action**
- F**  **Format**
- T**  **Target Audience**

Analysis: Now that we've shared examples of past captions, the LLM can replicate patterns we already value. Bonus points for LinkedIn analytics (to show what resonates with our audience).

